A Companion to Mexican History and Culture

BLACKWELL COMPANIONS TO HISTORY

This series provides sophisticated and authoritative overviews of the scholarship that has shaped our current understanding of the past. Defined by theme, period and/or region, each volume comprises between twenty-five and forty concise essays written by individual scholars within their area of specialization. The aim of each contribution is to synthesize the current state of scholarship from a variety of historical perspectives and to provide a statement on where the field is heading. The essays are written in a clear, provocative, and lively manner, designed for an international audience of scholars, students, and general readers.

A Companion to Mexican History and Culture

Edited by

William H. Beezley

This volume is dedicated to my co-author, colleague,
and close friend, Colin MacLachlan
and as always to Blue.

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Notes on Contributors

Claudia Agostoni is a historian and full time researcher at the Instituto de Investigaciones Históricas of the Universidad Nacional Autónoma de México (UNAM). Her research interests are the history of public health and health education during late nineteenth and early twentieth centuries. She has published articles on the social history of medicine and public health, and is the author of *Monuments of Progress. Modernization and Public Health in Mexico City, 1876–1910* and editor of *Curar, sanar y educar. Enfermedad y sociedad en México, siglos XIX y XX* . She has also co-edited *Los miedos en la historia*; *De normas y transgresiones. Enfermedad y crimen en América Latina*, and *Modernidad, tradición y alteridad. La ciudad de México en el cambio de siglo (XIX–XX)*. She is currently working on the social history of smallpox vaccination in Mexico.

Elena Jackson Albarrán is Assistant Professor of History and Latin American Studies at Miami University of Ohio. She researches children's popular culture in revolutionary Mexico, and she currently is working on a book entitled *La historia de la infancia* with Susana Sosenski.

Christon I. Archer is a specialist in the epoch of Spanish domination and the War of Independence in Mexico. He is also working on Spanish exploration in the Pacific Ocean with a focus on the eighteenth century Spanish voyages to the Northwest Coast. His books include, *The Army in Bourbon Mexico. 1760–1810* (Albuquerque: University of new Mexico Press, 1977); *The Wars of Independence in Spanish America*, ed. (Wilmington: SR Books, 2000); *The Birth of Modern Mexico, 1780–1821*, ed. (Wilmington: SR, 2003); and *A World History of Warfare* (Lincoln: University of Nebraska Press, 2003). Archer has written many articles and book chapters. At present, he is working on a project focused on the Royalist Army of New Spain and the transitions to Mexican nationhood, and a book titled *the Eagle and the Thunderbird: Spanish/Indigenous Relations on the Northwest Coast, 1774–1795.*

Linda Arnold is Professor of History at Virginia Tech, and is the author of *Bureaucracy and Bureaucrats in Mexico City, 1742–1835*, *Política y justica: la Suprema Corte mexicana, 1824–1855*, and numerous articles and book chapters. In addition to having catalogued major judicial record sets in the Mexican national archive and the Federal District

archive, at the invitation of Mexican archivists, she has produced electronic catalogues in searchable PDF format for the Mexico City archbishop's archive, the Mexican national archive, the Federal District archive, the defense archive, and the Supreme Court's historical archive and interactive CD-ROM and DVD sets in PDF of the colonial documents in the Mexico City archbishop's archive, the nineteenth century Supreme Court collection in the national archive, and the collection of 1825-1925 laws and decrees in the Federal District.

Liza Bakewell is Director of The Mesolore Project, Assistant Professor of Research at the Center for Latin American and Caribbean Studies at Brown University and NEH Associate Professor in the Humanities, Colgate University. Her publications include *Madre: Perilous Journeys with a Spanish Noun*; *Mesolore, www.mesolore.net* (co-authored); *Looking High and Low: Art and Cultural Identity* (co-edited); and *Object Image Inquiry: The Art Historian at Work* (co-authored). Her research focuses on the Spanish language, linguistics, contemporary Mexico, women's studies, material culture, aesthetics, and virtual learning communities.

William H. Beezley is the pioneer in Mexican cultural history, and is Professor of History at the University of Arizona., Co-director of the Oaxaca Summer Institute in Modern Mexican History, and Distinguido Profesor Visitante at El Colegio de México. His publications on Mexico include *Judas at the Jockey Club*, *The Oxford History of Mexico*, edited with Michael C. Meyer, *El Gran Pueblo* with Colin M. MacLachlan, and, recently, *Mexican National Identity: Memory, Innuendo, and Popular Culture*. His current research involves a reassessment of José Vasconcelos as Minister of Education in Revolutionary Mexico, and Malbec Wine in Argentina.

Dina Berger is Associate Professor of History at Loyola University Chicago. She is the co-editor of *Holiday in Mexico: Critical Reflections on Tourism and Tourist Encounters* with Andrew G. Wood and author of *The Development and Promotion of Mexico's Tourism Industry: Pyramids by Day, Martinis by Night* . She is currently working on the history of transnational civic associations in Mexico, particularly the Texas-based Pan American Round Table.

Christopher R. Boyer is Associate Professor of History and Latin American and Latino Studies at the University of Illinois at Chicago. His scholarship concentrates on the social and environmental history of Modern Mexico. His first book, *Becoming Campesinos: Politics, Identity, and Agrarian Struggle in Postrevolutionary Michoacán*, explains how the Mexican land reform influenced peasant culture in the 1920s and 1930s and he is currently finishing a second book on the social history of forest management in Mexico between 1880 and 1991, which will be published in 2011. His articles have appeared in the *Latin American Historical Review*, *Historia Mexicana*, and the *American Historical Review*, among others. He is also co-editor of a University of Arizona Press book series on Latin American environmental history.

Jürgen Buchenau is Professor of History and Director of Latin American Studies at University of North Carolina, Charlotte. His prior books include *In the Shadow of the Giant: The Making of Mexico's Central America Policy, 1876–1930*; *Tools of Progress: A German Merchant Family in Mexico City, 1865-Present*; *Mexico Other Wise: Modern Mexico in the Eyes of Foreign Observers*; and *Plutarco Elías Calles and the Mexican Revolution*.

Steven B. Bunker is Assistant Professor of History at The University of Alabama. He is the author of the forthcoming *Becoming a Consuming People: Creating Mexican Consumer Culture in the Age of Porfirio Díaz, 1876-1911.* He also has several publications on consumption, crime, and the French community in Porfirian Mexico.

Roderic Ai. Camp is presently the Philip McKenna Professor of the Pacific Rim at Claremont Mckenna College. He serves as a member of the Advisory Board, Mexico Institute, Woodrow Wilson Center for International Scholars, Smithsonian Institution. He is a frequent consultant to national and international media, including the *New York Times*, the *Wall Street Journal*, National Public Radio, and BBC. He is the author of twenty books on Mexico, six of which have been designated by *Choice* as outstanding academic books. His most recent publications include: *Politics in Mexico, the Democratic Consolidation* and *Mexico's Military on the Democratic Stage*. He is the recipient of an Honorary Doctorate in Humane Letters from St Olaf College for his scholarship and teaching on Mexico.

Susan M. Deeds is Professor of History at Northern Arizona University. She is a co-author (with Michael C. Meyer and William Sherman) of *The Course of Mexican History*, 9th ed. (Oxford University Press, 2010). She has authored *Defiance and Deference in Colonial Mexico: Indians under Spanish Rule in Nueva Vizcaya* (University of Texas Press, 2003), and many articles examining the ethnic, social, and cultural history of colonial Mexican north in the seventeenth and eighteenth centuries.

Deborah Dorotinsky has a B.A. in Cultural Anthropology fromU.C. Berkeley (1985), an M.A. and a Ph.D. in Art History from theUniversidad Nacional Autónoma de México (2003). She is a full timeresearcher in the Instituto de Investigaciones Estéticas, UNAM and professorof Historiography of Art, History of photography and Visual Culture and-gender topics in the Art History Graduate Program in the same university.She has published extensively in Spanish on the topics of visual imagery andethnic identity, indigenismo and photography and of late on visual cultureand gender in Mexico, 1920-1950. She was Academic Coordinator of the VisualCulture and Gender area in the Gender Studies Program (PUEG) in UNAM(2008-2010). She coordinated with Renato González Mello *Encauzar la mirada:** Arquitectura, pedagogía e imágenes en México 1920-1950",*México, UNAM,2010. She is the proud mother of two girls andd member of the Collage ArtAssociation.

William E. French is Associate Professor of History at the University of British Columbia. He is the past director of the Latin American Studies Programme at that institution and Co-director of the Oaxaca Summer Institute. He is the author of *A Peaceful and Working People: Manners, Morals, and Class Formation in Northern Mexico* and co-editor, with William Beezley and Cheryl E. Martin, of *Rituals of Rule, Rituals of Resistance: Public Celebrations and Popular Culture in Mexico* and, with Katherine E. Bliss, of *Gender, Sexuality, and Power in Latin America since Independence.* He has published articles in the *Hispanic American Historical Review* and the *Canadian Journal of Latin American and Caribbean Studies* and contributed to the *Oxford History of Mexico.* He is currently completing a book on love letters, diaries, and courtship in nineteenth- and twentieth-century Mexico.

Paul Garner (Ph.D. Liverpool 1983) is Cowdray Professor of Spanish in the Department of Spanish, Portuguese and Latin American Studies at the University of Leeds, UK. He is

the author of *La Revolución en la Provincia: Soberanía estatal y caudillismo serrano en Oaxaca 1910–20* and *Porfirio Díaz: A Profile in Power*. He was Senior Editor of the *Bulletin of Latin American Research* and is currently the Editor of the book series *Iberian and Latin American Studies* (University of Wales Press). In 2007–08 he was a Leverhulme Research Fellow (UK), and a Visiting Professor in the Centro de Estudios Históricos at the Colegio de México. His book *British Lions and Mexican Eagles: Business, Politics and Empire in the Career of Weetman Pearson in Mexico 1889–1919* will be published in 2011.

James A. Garza is an Associate Professor at the University of Nebraska-Lincoln. He is the author of *The Imagined Underworld: Sex, Crime and Vice in Porfirian Mexico City* (2008). In 2007, his article "The Long History of Mexican Immigration to the Rural Midwest' (2006) was selected by the *Journal of the West* as its best article of the year.

Paul Gillingham holds an Andrew W. Mellon Postdoctoral Fellowship in the Humanities at the University of Pennsylvania. He has published widely on state formation and nationalism in Mexico. He is the author of *Cuauhtémoc's Bones: Nationalism & Forgery in Mexico* (University of New Mexico Press, forthcoming in 2011) and the co-editor of *Soft Authoritarianism in Mexico, 1938–1968* (Duke University Press, forthcoming.)

Byron Ellsworth Hamann is a doctoral candidate in the Department of Anthropology and the Department of History at the University of Chicago. His research focuses on writing, religion, and material culture in medieval Europe, prehispanic Mesoamerica, and the early modern transatlantic. He is currently finishing a dissertation centered on inquisitorial documents from sixteenth-century Valencia and Oaxaca entitled "Bad Christians, New Spains: Catholics, Muslims, and Native Americans in a Transatlantic World." He is co-author of *Mesolore, www.mesolore.net*.

Timothy J. Henderson is Distinguished Research Associate Professor of History at Auburn University Montgomery. He is the author of *The Worm in the Wheat: Rosalie Evans and Agrarian Struggle in the Puebla-Tlaxcala Valley of Mexico, 1906–1927*, *A Glorious Defeat: Mexico and its War with the United States*, and *The Mexican Wars for Independence*. He is also co-editor (with Gilbert M. Joseph) of *The Mexico Reader: History, Culture, Politics*.

Susan Kellogg is Professor of History and Director of the Latin American Studies Program at the University of Houston. She is the author of *Law and the Transformation of Aztec Culture* and *Weaving the Past: A History of Latin America's Indigenous Women from the Prehispanic Period to the Present*. She is co-editor (with Ethelia Ruiz) of the forth-coming *Negotiation with Domination: New Spain's Indian Pueblos Confront the Spanish State* and is undertaking a project comparing conquest in four areas of Mesoamerica.

Víctor M. Macías-González is Associate Professor of History at the University of Wisconsin, La Crosse, where he directs the Institute for Latina/o and Latin American Studies. His research interests are gender studies, and the material and social culture of greater Mexico's long nineteenth century. He has published over a dozen articles and book chapters on manuals of etiquette, paintings, bath houses, masculinity, interior decoration, and beauty queens. Macías-González is presently revising a book manuscript on the Mexican aristocracy in the age of Porfirio Díaz, and has co-edited, with Anne Rubenstein, a volume on masculinity in modern Mexico.

Patricia Massé has a Masters degree in art history from the Universidad Nacional Autónoma de México. She is an investigator for the Instituto Nacional de Antropología e

Histora (INAH) in the National Photographic Archive (la Fototeca Nacional) in Pachuca. She has written *Simulacro y elegancia en tarjetas de visita. Fotografías de Cruces y Campa, 1998; Cruces y Campa una experiencia mexicana del retrato tarjeta de visita* (2000), y *Juan Antonio Azurmendi. Arquitectura domética y simbología en sus fotografías* (2009).

Diana Montaño is a Ph.D. candidate at the University of Arizona.

María L. Olin Muñoz is an Assistant Professor of History at Susquehanna University where she holds a Weber Fellowship in the Humanities. She is the co-editor of *Populism in 20th Century Mexico: The Presidencies of Lázaro Cárdenas and Luis Echeverría* and a contributor to the project, "Native Peoples of the World." She is currently working on a book manuscript that examines the role of indigenous communities and their leaders in reshaping official indigenous policies in Mexico after 1960.

Stephen Neufeld is Assistant Professor of Latin American History at California State University, Fullerton. A native of Calgary, Canada, his research interests have happily brought him to warmer climes, first to the University of Arizona for a Ph.D., and then to southern California. His continuing work focuses on the daily lives of soldiers and officers and their role in society and role of the military in the construction of the Mexican nation.

Daniel Newcomer is Associate Professor of Latin American History at East Tennessee State University in Johnson City. He is author of *Reconciling Modernity: Urban State Formation in 1940s León, Mexico* (Nebraska: 2004). His interests include popular and alternative cultures and their relationship to state formation. His current research explores the development of the beer brewing industry and its contributions to national identity in nineteenth-century Mexico.

Servando Ortoll holds a Ph.D. in historical sociology from Columbia University and is currently a research professor at the Centro de Investigaciones Culturales-Museo of the Universidad Autónoma de Baja California. He is the author and editor of more than 10 books and over 50 articles on Mexican social and political history. Currently, he is investigating Chinese migration to Sonora and Baja California and writing a biographical novel of Victoriano Huerta.

Ricardo Pérez Montfort Ricardo Pérez Montfort is a Research Fellow at the Centro de Investigaciones y Estudios Superiores en Antropología Social (CIESAS), Professor in the Postgraduate Division of the Faculty of Literature and Philosophy, UNAM, and Professor of History, Centro de Investigaciones y Docencia en Humanidades del Estado de Morelos. His research and publications focus on the cultural history and history of photography of Mexico in the nineteenth and twentieth centuries. In addition to hosting a public radio program on literature and music in Latin America, he has written 18 books and over 70 articles. His most recent work is *Cotidianidades, imaginarios y contextos: Ensayos de historia y cultura en México, 1850–1950*.

Pablo Piccato is Associate Professor at the Department of History and Director of the Institute of Latin American Studies, Columbia University. His research and teaching focuses on modern Mexico, particularly on crime, politics, and culture. Among books and articles published in the US and Latin America, his work includes *City of Suspects: Crime in Mexico City, 1900–1931*, *Actores, espacios y debates en la historia de la esfera pública en la ciudad de México* (co-edited with Cristina Sacristán), *True Stories of Crime in Modern Mexico* (co-edited with Robert Buffington), *Tyranny of Opinion: Honor in the*

Construction of the Mexican Public Sphere and a forthcoming article in *Social History*: "Public sphere in Latin America: A map of the historiography." He is working on poet Salvador Díaz Mirón, and on Mexican civil society's responses to crime.

Gretchen Pierce is an Assistant Professor of Latin American and World History at Shippensburg University. Her dissertation, "Sobering the Revolution: Mexico's Anti-Alcohol Campaigns and the Process of State-Building, 1910–1940" (2008), examines the temperance movement and State formation in Mexico from the national, state, and popular perspectives. It argues that both projects were contested and participatory.

Susie Porter is Associate Professor at the Department of History and the Gender Studies Program, University of Utah, and is author of *Mujeres y Trabajo: condiciones de trabajo y discursos públicos en la ciudad de México, 1879–1931*, co-editor of *Mexican History: A Primary Source Reader*, with Nora Jaffray and Edward Osowksi, and *Orden social e identidad de género. México siglos XIX y XX*, with María Teresa Fernández Aceves and Carmen Ramos Escandón. Her current research explores middle-class culture in Mexico. She also teaches leadership workshops in the Spanish-speaking community in Salt Lake City.

Monica Rankin is an Assistant Professor of History at the University of Texas at Dallas. Since she completed her Ph.D. in Latin American History from the University of Arizona, she has written *¡México, la patria! Propaganda and Production during World War II* (University of Nebraska Press, 2009) and *Encyclopedia of Latin American History and Culture: The Search for National Identity, 1820s-1900* (Facts on File, 2010). She has also written several chapters and articles that make her a pioneer in the history of Mexican diplomacy, gender, fashion, and identity in the 1940s. Her current research continues to examine these issues. She is a Director of the Oaxaca Summer Institute, where, notably, La Casona del Llano Restaurant has named "la sopa Mónica" in her honor.

Matthew Restall was educated at Oxford and UCLA, and is Edwin Erle Sparks Professor of Latin American History at Pennsylvania State University. He studies colonial Yucatan and Mexico, Maya history, the Spanish Conquest, and Africans in Spanish America. His articles and books include *The Maya World*, *Maya Conquistador*, and *Seven Myths of the Spanish Conquest*. Most recently he has published two edited volumes—*Beyond Black and Red* and *Black Mexico*, two co-authored volumes—*Mesoamerican Voices* and *Invading Guatemala*, and *The Black Middle: Africans, Mayas, and Spaniards in Colonial Yucatan*. He is a former NEH and Guggenheim fellow, editor of the *Latin American Originals* series, and co-editor of *Ethnohistory* journal.

Terry Rugeley is Professor of Mexican and Latin American History at the University of Oklahoma. He is the author of five books, including *Of Wonders and Wise Men: Religion and Popular Cultures in Southeast Mexico, 1800–1876* and *Rebellion Now and Forever: Mayas, Hispanics, and Caste War Violence in Yucatán, 1800–1880*. Dr. Rugeley divides his time between Norman, Oklahoma, and Mérida, Yucatán. He is currently working on a history of Tabasco's nineteenth-century civil wars.

Robert Schwaller received his Ph.D. at the Pennsylvania State University. His dissertation "Defining Difference in Early New Spain" compares the ideological development of socio-racial categories with the lived experiences of *mestizos* and *mulatos*. He published "'*Mulata, Hija de Negro y India*:' Afro-Indigenous Mulatos in Early Colonial Mexico" in the *Journal of Social History*.

Kathryn A. Sloan is Associate Professor of Latin American History at the University of Arkansas. She is the author of *Runaway Daughters: Seduction, Elopement, and Honor in Nineteenth-Century Mexico*. She has published essays in *The Americas* and anthologies of works on girlhood and masculinity. She is currently working on a synthesis of Latin American women's history for the Greenwood series Women's Roles through History.

Ageeth Sluis is an Assistant Professor of Latin American History and Gender Studies at Butler University. She is the author of "*Bataclanismo!* Or, How Female Deco Bodies Transformed Postrevolutionary Mexico City" in *The Americas* and "Journeys to Others and Lessons of Self: Carlos Castaneda, Heterotopia, and Indigenous Masculinity at the End of the Mexican Revolution" in the *Journal of Transnational American Studies* (forthcoming). She is completing *Deco Body/ Deco City: Spectacle and Modernity in Mexico City, 1915–1939* that examines the relationship between changing gender norms, embodiment, aesthetics, architecture and urban reform in Mexico City. She has conducted research in Mexico City, Rio de Janeiro, and Buenos Aires.

Gabriela Soto Laveaga is Associate Professor of History and Director of Latin American and Iberian Studies at the University of California Santa Barbara. She has published on population policies, the emergence of the country's steroid hormone industry, and traditional medicine in Mexico. Her first book *Jungle Laboratories: Mexican Peasants, National Projects, and the Making of the Pill* explores the local impact of the global search for medicinal plants through the case study of Mexican barbasco, the precursor to the mass production of synthetic steroid hormones. She is currently working on a new project on state repression, healthcare, and physician strikes in Mexico.

Elisa Speckman Guerra is a researcher at the *Instituto de Investigaciones Históricas UNAM*, and a member of the *Sistema Nacional de Investigadores*, the Mexican Academy of Penal Sciences, and the Mexican Academy of Sciences (AMC), she is the author of *Crimen y castigo* and *La Barra Mexicana de Abogados*, and co-editor of six books on the subjects of law, justice, criminality, legal culture, and social and cultural history. Among others prizes, she has received the AMC's prize for research in the humanities.

Michele M. Stephens received her B.A. in History from Rutgers College, New Brunswick, in 1999. She completed her M.A. in History, with emphases in Latin American and United States History, at California State University, Los Angeles, in 2004. Ms. Stephens is currently a Ph.D. candidate in Latin American History at the University of Oklahoma, examining the impact of the state on the Huichol Indians of Mexico during the nineteenth century.

Emily Wakild is Assistant Professor of History at Wake Forest University. She has taught courses or studied in Ecuador, Cuba, Guatemala, Mexico, Chile, and Peru. She has recently published articles in *Estudios Mexicanos/Mexican Studies* and *Environmental History*, and has a forthcoming article with Christopher Boyer in the *Hispanic American Historical Review*. She was awarded a Fulbright fellowship for her dissertation research and is now completing a book length study of the creation of Mexico's National Parks that examines the convergence of social reforms and nature protection. Her research interests include the social and environmental history of revolution in Latin America, the comparative history of conservation, and cultural understandings of climate history.

David Yetman holds the title of research social scientist at the Southwest Center of the University of Arizona, and has a Ph.D. in philosophy, but his writing career has been largely devoted to field work in Latin America. He has traveled on foot, horse, motor scooter, auto, and plane in Mexico for the last fifty years and has written extensively on Sonoran people, landscapes, and plants. His studies of indigenous people include extensive travels and life among Guarijíos, Mayos, and Seris. A specialist in the ecology and ethnobotany of columnar cacti, his books include *Mayo Ethnobotany*, *The Organ Pipe Cactus*, and *The Great Cacti, Ethnobotany and Biogeography of Columnar Cacti*. Since 2001 he has been the host of the Public Broadcasting System television documentary series "The Desert Speaks."
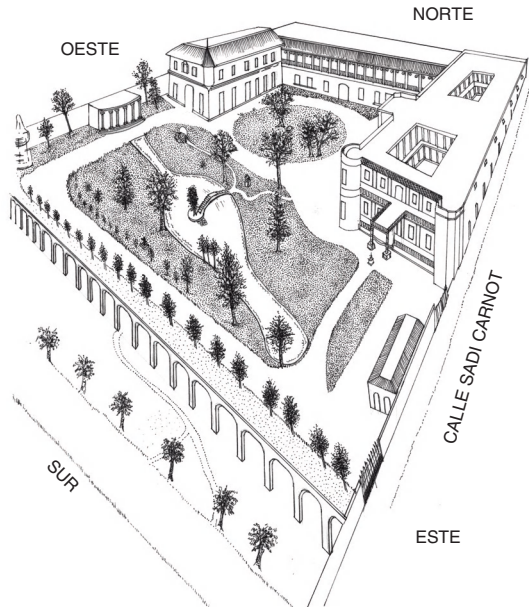
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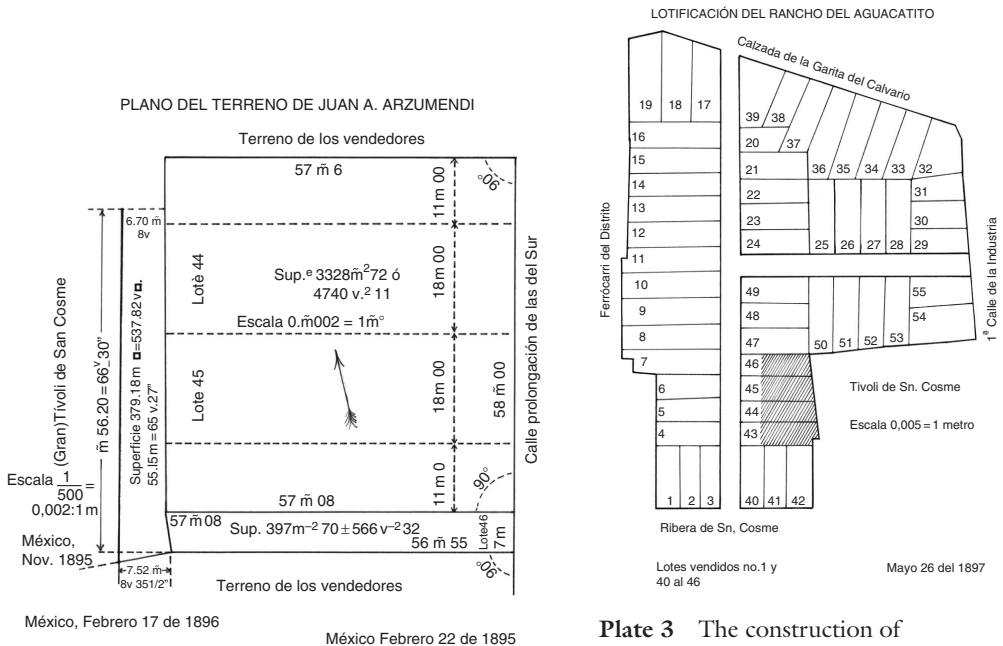
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Plate 19   Nicolás León, "Meassurement of the ear, according to Bertillon" in Cátedra de Antropología Física Del Museo Nacional de Etnografía, Arqueología e Historia. Antropometría, México, Imprenta del Museo Nacional 1911. Biblioteca del Instituto de Investigaciones Nicolás León, Biblioteca del Instituto de Investigaciones Antropológicas – UNAM.

Al fondo, tipo de mujer otomí. Exposición Etnográfica de la Universidad Nacional.

Plate 20 Raúl Estrada Discua, "Otomi mother" a view within the show Exposición Etnográfica, November 1946, Palacio de Bellas Artes, Mexico City. Instituto de Investigaciones Sociales, UNAM. Instituto de Investigaciones Sociales – UNAM.

Plate 21 Raúl Estrada Discua, "Mame indian, Tuxtla Chico, Chiapas" *Archivo México Indígena*, cat.#1365, Instituto de Investigaciones Sociales, Universidad Nacional Autonóma de México 1939–1946. Courtesy of Instituto de Investigaciones Sociales, UNAM. Instituto de Investigaciones Sociales – UNAM.

Plate 22 Raúl Estrada Discua, "Zapotecs from the Sierra, hats" *Archivo México Indígena*, cat. #4550 Instituto de Investigaciones Sociales, Universidad Nacional Autonóma de México 1939–1946. Courtesy of Instituto de Investigaciones Sociales, UNAM. Instituto de Investigaciones Sociales – UNAM.

Plate 23 Luis Márquez Romay, photographs in *Revista de Revistas*, October 1, 1939. Biblioteca "Rubén Bonifaz Nuño" Nacional, Instituto de Investigaciones Filológicas, UNAM. Instituto de Investigaciones Filológicas – UNAM.
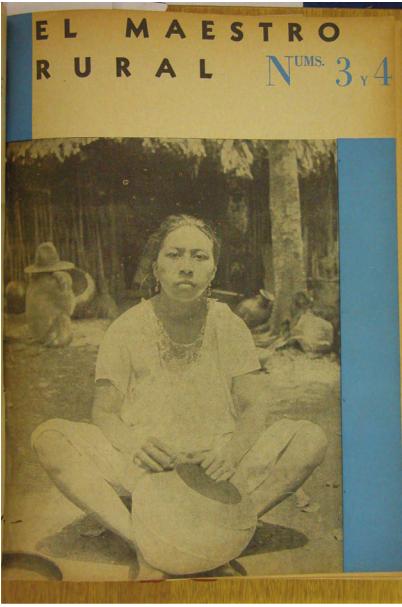
Plate 24 Manuel Álvarez Bravo, "India alfarera, Yucatán" *El maestro Rural*, Secretaría de Educación Pública, No. 3 and 4, 1937. Hemeroteca Nacional, Instituto de Investigaciones Filológicas, UNAM. © Colette Urbajtel/ Asociación Manuel Álvarez Bravo.

Introduction: The Dimensions of the Mexican Experience

This Companion recounts approximations. Here is the explanation: The Mexican experience, the lived history and culture of the peoples who have occupied and still occupy this land of diverse geography, biology, and ethnicity, has been recorded in captivating visual, aural, oral, glyphic, and written narratives. Modern historians have successfully recuperated only some of these rich, provocative, and dramatic accounts, usually with an emphasis on the rise of governing systems and their fall accompanied by destruction, death, and disappearance. Nevertheless, their remnants and glimmers become the echoes and ghosts that can be used to recreate an estimation of these past societies.

Approximations of the life that no longer exists are the best that can be accomplished, so that differences of opinion and interpretation abound about the appropriate emphasis, interpretation, and individuals. These differences themselves are fascinating, as they demonstrate the ancient Hindu story of the blind men and the elephant. In a delightful nineteenth-century poem about them, John Godfrey Saxe begins

> It was six men of Hindustan
> To learning much inclined,
> Who went to see the Elephant
> (Though all of them were blind),
> That each by observation
> Might satisfy his mind

Once he had described each effort at description and identification, Saxe concluded with a strophe about the debates:

> And so these men of Hindustan
> Disputed loud and long,
> Each in his own opinion
> Exceeding stiff and strong,
> Though each was partly in the right
> And all were in the wrong.

Like the learned Hindus, scholars have debated what this story means. Does it express the relativity or the inexpressible quality of complete, empirical knowledge, especially history? In this volume, the authors have dismissed both relative and inexpressive questions, and, as they provide their own narrative, have each discussed in detail the varying approximations. Rather than be concerned that each offers only an estimation of the past, we should delight in how the different accounts, when taken together, compose a mosaic that reveals a glimmer of the past as it was lived. Put another way, rather than dispute which description is the most correct, we should ask what view we get if we combine the approximations—and, with this insight, we are the richer for it.

Vanished peoples and extinct places make up history, and no matter how much the author attempts the scientific style or the social scientific jargon (often just literary analysis gone bad) or both, it remains a romantic endeavor. Far pavilions or day-old dreams, it makes no difference, describing each begins with a sense of romance (Levin, 1959). Knowing the variations of this romance make it richer and more interesting, so it becomes thought provoking. In sum, that is the goal of the authors of the chapters that follow: to review both amateur and professional approximations.

Efforts at systematic narratives about both Mexico's history and culture began in the mid-nineteenth century, but earlier history deserves mention. Although not a comprehensive narrative, the *Historia Antigua de México* (1974), published in Bologna, Italy in 1780–1781 by a Jesuit priest expelled from Mexico had a great influence on the thinking of early Mexican nationalists. The author, the criollo Francisco Javier Clavijero, in the course of his work identified unique characteristics that might be seen as a precursory description of national identity. The book was translated into English, German, and Spanish, and achieved a wide audience.

Nevertheless, national surveys attempting comprehensive narratives did not appear until decades later. Emperor Maximilian, in the hope that political animosity could be put aside within the arts and sciences, founded the Imperial Academy of Science and Literature in 1866. He thought the Academy might foster reconciliation of the deeply divided society. At one of the Academy's first meetings, Manuel Larrainzar, a politician and diplomat from Chiapas, presented an outline for the first general history of Mexico, from pre-Columbian times to the arrival of the Imperial couple. In the midst of a war between the Liberal forces of Benito Juárez and intervention troops of the French and Conservative forces of Maximilian, the time for such a general history that told a harmonious story of open-ended national development had not yet come. History and specifically public history rather became a battleground in which each contender fought to impose its own version of what Mexico had been, and hence of what it would be (Pani, 2011).

The first successful general history came in the now classic five-volume *Mexico a traves de los siglos* (1883) directed by Vicente Riva Palacio. He created a chronology with the following periods, each the subject of one volume: first, Ancient History and the Conquest, ending in August, 1521; second, the Viceroyalty, 1521–1808, that is, the colonial period; third, the War for Independence; fourth, Independent Mexico, 1821–1855; and fifth, The Reform, 1855 to 1876. Each volume, he divided further into chapters based on chronology, so that change and progress evolved across the text. In the first volume, for example, he identified major cultural groups such as the Toltecs, Maya, and Mexica, each building on previous cultures and evolving toward increasingly sophisticated societies. Although Riva Palacio included a good deal of economic and cultural information, his political narrative dominated the text, following indigenous, Spanish

and, finally, Mexican domination of the land through the actions of men, although some women do appear, as political beings.

This multi-volume survey served as the inspiration, in many ways, for another major achievement written by the Minister of Public Instruction for Porfirio Díaz's government. Justo Sierra wrote poetry and literature before turning to history with several efforts that resulted in his *Evolución política de México* (1910) that devoted over half its pages to the events affecting the national regime during the nineteenth century. Charles Hale, in 1970, stated unequivocally that it remained the unsurpassed one volume national history, not least of which resulted because Sierra "… had an eye for drama in history and especially for irony" (Hale, 1970). Sierra, with his history, wanted to educate the general population as part of his Positivist, secular campaign to make the nation more modern. His basic organization identified the indigenous era, the colonial period, and the independent nation, and he successful made these parts a narrative of evolution that combined the indigenous heritage with Spanish traditions to create the new independent culture and people—the mestizo. This approach unified Mexico's antithetical past (O'Gorman, 1969).

Sierra's interpretation stood in the early twentieth century, in part because the revolution disrupted historical undertakings as much as it did everyday life. Only in 1937 did José Vasconcelos write another survey, the rather mean spirited *Breve Historia de México*, prepared after he had already abandoned his optimism for both social change and ethnic integration. After World War II historians again tackled the writing of a general synthesis of the national history. The increased professionalization of the discipline came with the founding of the Colegio de Mexico, the establishment of research seminars there, and the training of professional historians. The success of the *Historia Moderna de Mexico* directed by Daniel Cosío Villegas and focused on the era 1867 to 1911, soon inspired the *Historia de la revolución*, in 23 short monographs. Luis González in *El Oficio de Historiar* offered an introductory, useful, and interesting guide for historians that included specific examples delineating narrative style and periodization (González, 1988). The training, and his volume, resulted in the Colegio's jointly authored undertaking *La historia general de México*, now in its third revised edition. These volumes have different approximations of the Mexican past largely as a result of the different authors who were assigned chapters in the different editions, but the most recent volume also contains a revision of the chronology, with expanded geographic and cultural chapters.

English-speaking readers in the nineteenth century at first became familiar with Mexico only through the history of its dramatic episodes or by parenthetical digressions of travel writers. The two most famous examples of these approaches are the classics by the U.S.-Scots woman Fanny Calderón de la Barca, written first as letters and a journal, then published as *Life in Mexico* (1843), and by William Hickling Prescott the superb *History of the Conquest of Mexico, with a Preliminary View of Ancient Mexican Civilization, and the Life of the Conqueror, Hernando Cortes* (1843). Both books became best selling volumes in the United States and Great Britain.

General narratives in English for Mexico did not appear until the twentieth century. The first comprehensive account was *The History of Mexico* (1938) by Henry Bamford Parkes. With historical training at Oxford University and a Ph.D. in history from the University of Michigan, Parkes brought a professional approach to his investigations and an anecdotal style that organized the narrative around colorful individuals and melodramatic events. He wrote a number of other national histories and political biographies, and he became recognized as a historical author rather than a Mexican historian. Lesley

Byrd Simpson soon appropriated Parkes's approach and modified it to be slightly more scholarly in his widely read *Many Mexicos* (1941). His readable and rather concise history, elaborated, for example, the story of Antonio López de Santa Anna's lost leg, so that it became a part of the common narrative, either through readers of the book or through efforts by professors to utilize this and other of Simpson's anecdotes to give some zip to their lectures. Equally enduring has been his thesis: that because of the tremendous cultural and political diversity within the region, there is not one, but Many Mexicos. This has become an article of faith, explicitly or implicitly, shaping general narratives until today, used to explain regional diversity and state differences. Both volumes remain in print (last revisions, Simpson 1960, and Parkes 1972) and both continue to have general and classroom sales, despite being badly outdated.

As these various Mexican and foreign authors over the past century and half have made an effort to understand both the evolution of politics and the lives of the people, they have, for the most part, adopted the creation of the national government and the national identity as the over-riding theme, or at least the primary or most prominent pattern of events. Take, for example, the most successful one volume history in English, Michael C. Meyer's narrative, written with his notable coauthors William Sherman and Susan Deeds, entitled *The Course of Mexican History*. The basic structure has remained through nine editions of the book, although the narrative has changed by widening its perspective. The historical plot, like the Mississippi River, has rolled and at time roiled through the nine editions, picking up all matter of detritus and silt. The authors rely on the political narrative, but have added to it economic and social considerations, with a chapter for each era on cultural—that is, usually artistic and literary—production. The organization reviews Mexico's past as a political, governmental experience and uses the chronology common when Meyer first wrote his class lectures of the 1960s that became the text. This periodization divided into lecture-length chapters remains. So, the periods move from the earliest indigenous peoples to the arrival of the Spanish and their colony (divided into chapters on Conquest, Hapsburg New Spain, and the Bourbons). Chapters then move from independence through 1848, 1849 to 1876, 1876 to 1911, 1910 to 1940, 1940 to the present. Of course, the last period has changed over the last twenty years. Overall the Meyer approach represents a decidedly Liberal, professional analysis compared to earlier accounts.

Other general texts that have come and gone that have offered different chronologies, at least for the years since independence. In *El Gran Pueblo*, Colin MacLachlan and William Beezley argued that 1938 represented an end to the revolution, if the revolution was defined as programs—especially worker organization in the city and public health campaigns, educational missions, and land reforms—aimed primarily at the countryside. In that year Cárdenas shifted government support to an industrial, productionist approach to national modernization. Although there is a slight difference in the period, both this textbook and *The Course of Mexican History* interpret the revolution as a popular movement, whose major goal, through social and economic programs, was designed to create an egalitarian, inclusive society providing jobs, education, and health care to all, and success based on a meritocracy of individual achievements. The authors of both texts gave a prominent place to the revolution and used it to explain efforts at the re-invention or re-creation of a national identity.

In a number of monographs, another group of historians have begun to argue that the revolution was nothing more than a political conflict that ended in 1920. Several of these authors, motivated it seems by an understandable dissatisfaction with the official party,

the Partido Revolucionario Institucional (Institutional Revolutionary Party or PRI) and its national politics and administrative programs, especially after the middle 1970s, read backwards from this point to assume that the party from its creation in 1929 had always been the same; they have selected 1920 as the end of the revolutionary violence, and therefore the end of the revolution. In fact, this interpretation that the revolution ended in 1920 suggests a variant of the Great Man argument, because it rests on the emphasis that just one of the major revolutionaries, after a lethal game of musical chairs, remained: The ultimate winner, Obregón took the presidency, while the other three contenders, who had chosen sides and fought a civil war from 1914–1916, were dead (Zapata and Carranza) or retired (Villa). In an approach that is something like fixing the end of the Soviet revolution as when Stalin takes power, earlier versions of this particular argument rest on the Marxist analysis of revolution and on the illusion that a proletarian revolution was a possibility. This wistful interpretation, especially in light of the literary turn, might be called "uchronic." Science fictions critics coined the term "uchronia" to express an "amazing theme in which the author imagines what would have happened if a certain historical event had not taken place." The word represents a companion to utopia that focuses on a nowhere place with its concern for time (chronos), thus a nowhen event (Portelli, 1991, pp. 99–100, 299, citing Pierre Versins). In other words, these interpreters declare the end of the revolution in 1920 because it did not develop as they desired or expected; in many ways it is an expression of "if only" history or perhaps the most Mexican of all phrases that begins "Hubiera ...." This scholarship implies possibility over actuality. Among many of these authors, there exists an ideological belief that things could have been different, with better leadership, for example. They depict, in the words of Alesssandro Portelli, a history of "... the revolution as a single, traumatic and violent confrontation rather than as a slow and deep process of social change" (1991, pp. 100, quote 105).

Other historians have fixed the end of the revolution following the 1968 massacre at Tlatelolco or later, when the daily life created by the revolution abruptly changed following the 1982 peso devaluation (Lomnitz, 2003) and the ensuing national economic crisis. This question of when the revolution ended remains unresolved and the different interpretations divide the historical analyses of the twentieth century. As a result the division of the century into periods remains a significant analytical point of contention.

The chapters that follow have been written by congeries of authors from Mexico, the United States, Canada, and Great Britain. In many cases, the authors have established their reputations closely associated with the theme or period they write about. Thus Susan Kellogg skillful reviews the Ancient Indigenous Cultures, examining historical, ethno-historical, and archaeological scholarship that has recently reshaped our knowledge of this era. Mathew Restall, known for his monographs devoted to the Spanish conquest, joins with one of his recent graduate students, Robert Schwaller, to evaluate this period and its literature. Chris Archer, who long ago carved out a field combining military and political history of the independence wars and early republican politics, brings that expertise to bear on the literature of the era. Linda Arnold, celebrated for her digitalization projects of Mexico's Supreme Court and Congressional archives, has worked for sometime on the U.S.–Mexican war and its sources, and her essay for the first time puts that information in print. Erika Pani, Paul Garner, Jurgen Buchenau, Daniel Newcomer, and Rod Camp have each built on their well known previous work to write essays that broaden their interpretations and evaluate other scholars' publications of the French intervention and empire, the Era of Benito Juárez and Porfirio Díaz, the Sonoran revolutionaries, anti=government campaigns, and

recent democratic politics. Crime and punishment has been the focus of Elisa Speckman Guerra for some time and, in this volume, she reviews the law and law enforcement for the years of Porfiriato and the revolution. Dave Yetman, well known as both a print and television natural historian, again focuses on his passion, Mexican Cacti.

In other cases, the editor has challenged authors to write about a different period or theme, with the idea that a fresh pair of eyes might discover a different view. Some examples include Susan Deeds, known for her work on the Hapsburg seventeenth century, switching with Linda Curcio-Nagy, who regularly writes on the Bourbon eighteenth century; Bill French, much of whose work focuses on the Porfiriato and gender topics, deftly considers the sweep of daily life from independence to the present. Readers will certainly be aware of Mark Wasserman's important summary of nineteenth- century everyday life (2000), but Bill identifies and evaluates a surprisingly large literature for the entire period in both English and Spanish. James Garza, also a Porfirian scholar, turned from his usual interests of crime and justice to look at natural disasters and science in the nineteenth century. Katherine Sloan, still another Porfirian expert, moved from gender in Porfirian Oaxaca to evaluate the secularization of society through the implementation of the 1857 Constitution that climaxed in the Penal Code of 1871. Susie Porter, known for her studies of gender and women workers leading to the 1931 labor law, took up the challenge to evaluate the Cárdenas presidency; Paul Gillingham, whose monographic research offers an intensive study of Guerrero state politics in the 1940s, considers non-revolutionary and non-political factors that have shaped the twentieth century, especially the demographic patterns of population increase and urbanization,

Other authors have written essays that offer previews of new endeavors. Tim Henderson, who has recently published on both Independence and the United States–Mexican War, in his chapter for this volume looks at the major contemporary issue of immigration to the United States and places it in historical context in a condensed sample of his next book. Bill Beezley, now working on a reevaluation of José Vasconcelos as Minister of Public Education (1921–1924), here explores this ministry's programs and their relationship to other campaigns for mass education, national folklorization, and indigenous incorporation throughout the hemisphere. Ariel Rodríguez Kuri has been researching the years after World War II, especially the 1960s, and his essay for this volume offers a concise portrait of his forthcoming book on the era. Rod Camp's essay condenses the pertinent themes and analyses of his new, essential work, *The Metamorphosis of Leadership in Democratic Mexico* (2010). In a wide-ranging cultural essay, Ricardo Pérez Montfort gives an outline of the next in his series of studies on popular culture, national folklore, and the mass media.

Scholars just entering the profession have contributed essays on the general topic of their dissertations, bringing to bear the latest scholarship through their recently done literature reviews, on themes that are new or newly considered. These authors include Gretchen Pierce on the revolutionary anti-Alcohol campaign, Steve Neufeld on the military, Elena Jackson Albarrán on children in the revolutionary era, and Maria Múnoz on the indigenous movement of the 1970s. Steve Bunker, drawing on his recent dissertation on Porfirian consumer society, soon to appear as a monograph, and Víctor Macías González, an established gender historian, tackled in two chapters the broad general theme of consumer culture throughout the Mexican experience.

Chapters weaving in and out of the other essays represent three particular themes unique to this volume: the indigenous experience, examining Indian communities beyond treatment as victims or insurgents, the visual representation of episodes of

everyday life, and the prevalence of the environment. One major historical contour, too often ignored or set to run parallel to the political accounts, examines the history of the indigenous people. Of course, these indigenous peoples form the basis of the pre-colonial accounts, but following the conquests Indians largely disappear from the principal narrative. Land and labor discussions serve as metaphors for the indigenous experience, while other metonyms include evangelization that expressed their cultural place in the colony, with court suits and agrarian rebellions that reveal their reactions to colonial impositions. The indigenous past, except by the merest implications, remains outside the general history. Several scholars in this volume have focused on the indigenous experience to bring it into the overall narrative. Susan Kellogg, Matthew Restall, and Rob Schwaller have integrated discussion into their chapters of the latest work on the indigenous world. These include for the Aztecs, Susan Schroeder and several others who have used Nahual documents to reconstruct daily life and, for the Maya, especially in Yucatán, Matthew Restall describes his work and that of others. These are excellent, if expected evaluations, while other essays provide a different focus on indigenous life and communities. These include Liza Bakewell and Byron Ellsworth Hamann's evaluation of the *Codex Zouche-Nuttall* (c. 1450) and analysis of the *Lienzo de Tlaxcala* (c. 1552) through their monumental digital project called Mesolore. Their chapter, as it discusses their on-line project, provides an introduction to a richer view of the pre-conquest and colonial era, and explores in wonderful detail the context of the indigenous life described in these documents. For the nineteenth century, general Indian history and the Maya in particular, Terry Rugeley and Michele M. Stephens provide an introduction that, among its many themes, raises intriguing questions about the Caste Wars, everyday indigenous life, and Indian–Mexican interactions. In "Ethnographic Images of the Nineteenth and Twentieth Centuries," Deborah Dorotinsky not only integrates indigenous experience into the general historical narrative, but also explores the efforts to photograph the vanishing indigenous societies. She offers in this way a discussion of critical visual sources for peoples for whom few records exist. Maria Múñoz, in her essay on Indigenous Mobilizations after 1940, offers a gateway to the twentieth-century indigenous history outside of the national, political framework. She demonstrates that the 1994 insurrection by the Zapatista Army of National Liberation (EZLN) was no sudden departure from previous events, nor an isolated incident, but can be traced back at least to the First National Congress of Indigenous Peoples, 1975. The work of all these scholars can be read as a general introduction to the nation's indigenous history.

A discussion of the visual history of the nation can be followed through several chapters interwoven throughout the text. These include the stunning images of Mesolore by Liza Bakewell and Byron Ellsworth Hamann, the striking photographs of indigenous peoples in the essay by Deborah Dorotinsky, and the other specifically visual chapter, "The House at 33 Sadi Carnot: Photography and Domestic Architecture in Porfirian Culture," by Patricia Massé. Bill French includes in his chapter a discussion of the critical importance of images (lithographs, drawings, and photographs in the nineteenth century, and these in addition to photojournalism for the twentieth century) as sources for daily life. Moreover, several authors include visual images that make a critical contribution to their analyses. These include the essays of David Yetman on cacti and Elena Jackson Albarrán on revolutionary children. These visual accounts deal with still photographs, but an emerging approximation of the Mexican experience can be found in the growing number of documentaries, several done for commercial television. Both Dorotinsky and Beezley mention documentaries, but as of yet there is no systematic

review of them. Even though Enrique Krauze's production company, now called El Nuevo Siglo, has produced some 200 documentaries and other directors are active as well. A recent example appeared on the Public Broadcasting Service in the summer, 2010. In "The General," director Natalia Almada examined the presidential career of Plutarco Elías Calles. As his great, great grand daughter, she inherited audio recordings, preserved by his daughter, Almada. She brings them to life in the documentary and uses them with visual images to evaluate his legacy in Mexico today.

The environmental chapters demonstrate Mexico's physical, biological, and ecological diversity, and these are discussed in Chris Boyer's examination of regionalism, David Yetman's evocation of the Cactus Metaphor, James Garza's discussion of nineteenth century natural disasters, and Emily Wakild's review of twentieth-century environmental studies.

Moreover, this volume includes unique chapters. Servando Ortol and Pablo Piccato examine for the first time the writing of the now classic *Historia Moderna de Mexico*, that stands as the monument to the professionalization of the historical discipline and the emergence of the Colegio de México as a premier research institute. In this fascinating account of the multi-volume history of Liberal dominance (1867 to 1911) under Benito Juárez and Porfirio Díaz, there emerges an intellectual portrait of Daniel Cosío Villegas, the editor of the volumes, and a description of the funding of Mexican scholarship provided by the Rockefeller Foundation. Gabriela Soto-Laveaga and Claudia Agostoni have written a chapter that examines, especially for the twentieth century, the history of science, technology, and medicine. They offer readers an overview that brings together both the conclusions and interpretations found in their outstanding publications and places their work in the context of the scholarship of other scholars as well. Their essay provides a beginning point for research on scientific, medical, or technological topics.

Even in those chapters examining traditional subjects, one finds surprises. Monica Rankin and Dina Berger in their examination of foreign policy provide a wealth of new information for the years from 1934 to 1958, moving beyond just Mexican–U.S. relations. They draw on their new work and also studies by Amie Kiddle, Daniela Spencer, and others. Jurgen Buchenan, in what appears to be a traditional chapter on the Sonorans and revolutionary government, revises our understanding of the Calles and the Maximato regimes, particularly the presidency of Abelardo Rodríguez. Ariel Rodríguez Curi adds an innovative expansion to the interpretation of post-World War II society and politics. The volume concludes with an essay in which Ageeth Sluis looks at the prominent and emerging questions that merit investigation. Many of the authors provided suggestions as well, and she brings them together in a coherent statement.

The authors, as they have reviewed historical narratives, analyses, interpretations and stories, in some cases have discussed what might be judged from today's perspective as "… errors, inventions, and myths" in the existing accounts, but in general they represent discrepancies of interpretation. (Think Hindu scholars and the elephant.) At the same time, different sources and conclusions open additional lines of research. Even noting these differences as defects does not discredit the work, but rather emphasizes the difficulty of the enterprise and reveals the nature of the sources, the assumptions being made, and questions being asked by various generations of historians as they shape historical narratives. Moreover, these differences, and even mistakes and flaws, can also be seen as guides to something more than evidence: as Alessandro Portelli suggests, they can sometimes lead "beyond facts to their meanings." (1991) Here, reading against the grain, looking between the lines, listening to the silences, imaging the scene, and assuming the error was, consciously or unconsciously, deliberate likely will bring us closer to ambition, desire, love, pleasure, faith, bravery,

cowardice, and delight. As we find these and other emotions, we can perhaps understand "the need to trust" and "the capacity for wonder" (Byatt, 1990, p. 180), all characteristics that gave individuals humanity in the past, as they do today.

The diverse voices in this volume at first seem only to create a shrill cacophony, but approached closely they quickly form a chorus that captures many of the rhythms, harmonies, and solos, with occasional improvisational riffs, that offers rich approximations of Mexico's history and culture. Each of the chapters, after they have been read once, will demand re-reading and re-consideration because the authors have offered more than historiography and more than new interpretative essays. Taken together their work provides a statement of the history and cultures that recognizes and celebrates Mexican diversity. Although seen through various approximations, they take a preeminent place in the national patrimony.

William H. Beezley
Medellín, Colombia

A note on sources. The authors of the following essays come from a multiplicity of disciplines and nations with equally diverse systems of citations. Rather than imposing one style of references, the editor has incorporated the citations of each author, some of whom have adopted a standard social science system. The different citation forms make explicit the interdisciplinary nature of the authors and their essays, and allows the authors to accomplish different things in their references.

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PART I

The Mexican Experience

Living the Vida Local:
Contours of Everyday Life

WILLIAM E. FRENCH

Caught up, since the final decades of the twentieth century, in the desire to write about those previously considered inarticulate, using various forms of "history from below" or following the twists of the cultural turn; historians of Mexico, as historians elsewhere, have given their attention to popular culture, ordinary values, and common practices. This has led them to take up, among other subjects, Judas burnings on Holy Saturday; the popular or "folk" versions of liberalism, citizenship and Catholicism; manners and morals; civic celebrations and village bands; and the spaces and places of everyday life, all as arenas of contestation and negotiation, and many increasingly inflected by the insights and methodologies informed by histories of gender, sexuality, ethnicity, and national imagining. Cultural history—as much a means of professional self-definition as a coherent approach or commonly accepted set of assumptions—while fundamentally concerned with many aspects of what may be described as the quotidian and essential in providing the tools to put into question the seemingly self-evident nature of this category, cannot claim to be the only source of inspiration for the extensive concern, evidenced in both the past as well as in the present, with daily life in Mexico. As much as from cultural history, scholars continue to find in the nineteenth-century novels, travel accounts and historiographical path forged by historians in Mexico, inspiration to help shape the present configurations of the field. Perhaps it is only fitting, therefore, to begin tracing the contours of everyday life in the various forms of foundational fictions that date to the nineteenth century.

Before turning our full attention to these works, it is important to recognize that, in combining attention to everyday life with an ulterior motive, in this case didacticism, novelists were hardly unique. Travelers in the nineteenth century too, in celebrated accounts like that of Fanny Calderón de la Barca, often provide unparalleled descriptions of the everyday while simultaneously managing to make clear their abhorrence of much associated with life that was a little too daily, too associated with the lower classes, as when a *lépero* happened to intrude upon her writing. Framed variously as examples of the exotic, the picturesque, the other, or simply the bizarre, episodes of *Life in Mexico*—from the

sounds of street vendors, the architecture of haciendas, gambling houses, and humble abodes, to women's fashion, education, and manners and morals, to views of the urban landscape as well as the scourge of rural bandits—come alive in such texts. Nor can those historians of the first half of the nineteenth century, crafting out of the past histories suitable for their vision of the new nation replete with categories like "the people," the "masses," and "citizens" that they hoped to bring into existence with their very narratives, be exempted from the charge of marshaling evidence from everyday life in support of their politics. Indeed, how could it have been otherwise? It might be worth reminding ourselves at this point that all texts, whether novels, travel account or histories written from archival sources, pose problems not only in teasing out the contours of everyday life but also in constructing, often in very different ways, what is even meant by that term.

Writers of novels in nineteenth-century Mexico, beginning, not coincidentally, with the formation of the nation itself, took as some of their main subject matter the description of local customs, seeing in them both the epitome of what was original and particularly Mexican as well as the raw material out of which suitable national beings might be molded. Two novels, together spanning the course of the nineteenth century, bracket the epoch of *costumbrismo*, that genre of writing concerned with custom and everyday life as a means both of expressing place and forging national character. The first, *El Periquillo Sarniento* or *The Mangy Parrot*, written by José Joaquín Fernández de Lizardi, appeared in 1816 during the revolution for independence and was published in installments at the rate of two chapters per week. It gathered conveniently in one location many of the themes that would become dear to the hearts of those intent on teaching through the rhetoric of moral reform. The qualities they desired in citizens of the nineteenth century included a Manichean vision of the world divided between virtue and vice; a commitment to utility or usefulness as measured by a constant preoccupation with being productive, finding a trade, and not ending up a burden to society by becoming yet another *letrado* (lawyer); and the admonition that people be judged by their acts and deeds, that is to say, by their internal qualities rather than by external signs or trappings such as clothes or manners, their social status or position. *El Periquillo* is, nevertheless, resolutely focused on the low, the customs of the streets as well as the argot of gamblers, criminals, highwaymen, and the poor, in short, the everyday. Accompanying *El Periquillo* on his journey through Mexico and its customs and even to the Philippines, as well as from rogue to respectability, readers, in addition to learning about food, drink, habits, manners (ill and otherwise), and conviviality, receive an education in such things as mourning customs, household inventories, gaming practices, the legal system including life in prison, various occupations, the abuses inflicted by the Church on indigenous participants in Holy Week celebrations, and the shortcomings of contemporary institutions of education.

So popular was *El Periquillo* that the book was reprinted a number of times through the 1820s, 1830s, and 1840s, incorporating at first engravings, and then, beginning in 1842 and subsequently, a new form of representing daily life: the lithograph. In fact, as María Esther Pérez Salas shows in *Costumbrismo y litografía en México: Un Nuevo modo de ver* (2005), *costumbrismo* was one of the most important genres for integrating text and image, thus reinforcing visually the romanticism, nationalism, and, at times, the didacticism and morality of literary texts. In the case of *El Periquillo*, lithographers turned their attention to graphically interpreting the action and events that Fernández de Lizardi had crafted with his prose, especially those critical moments in the book having to do with fights between men and the fainting of women, along with the duels, dinners, and

dangers, all the while managing, she concludes, to maintain with the illustrations the same high quality as found in the narrative itself.

A form of visual national imagining that came to prominence in the first half of the nineteenth century, lithography built on colonial precedents like *casta* painting and the sculpting of wax figurines while drawing from contemporary transnational artistic and literary currents associated with romanticism and *costumbrismo* in France, Spain, and elsewhere. A close relationship between lithography and national themes and imagery developed in the 1840s, reaching its most compelling expression in *El Museo Mexicano*, a literary magazine published by Ignacio Cumplido and directed by Manuel Payno and Guillermo Prieto, especially in this periodical's attention to the portrayal of "national types" and customs (to which we return later in this chapter). Attention to "types," usually tradespeople, servants, street vendors, and other figures that had been elaborated in various artistic forms during the colonial period, or were the subject of travelers' accounts, or both, became an important subgenre of *costumbrismo*, leading to the publication, in installments beginning in 1854, of *Los mexicanos pintados por sí mismos*, an illustrated and textual portrait of 35 "types," beginning with "El Aguador," ("The Watercarrier") a fixture of life in Mexico City at that time, and also featuring "La China," a female figure whose manner of dress would evolve, as we will see, into the symbol of Mexico itself. Although idealized, romanticized, even some times exoticized and eroticized, while at other times sanitized or invested with nostalgia, such images, always framed within the dominant discourses of ethnicity, gender, and class of the time, provided visual testimony to the country's uniqueness within a well-established genre of representation shared by many nations, while at the same time offering glimpses of everyday clothing, food, and drink; the tools of various trades; the setting, whether it be urban or rural; and of the tastes and proclivities of their bearers.

Helping to imbue *costumbrismo* with its nationalist hues and an early contributor to the development of the subgenre of "national types," Manuel Payno worked closely with lithographers as early as the 1840s to elaborate such figures as the Aguador (noting the importance of this figure to daily life not only as the deliverer of water but also in controlling the animal population, serving as a source of information on the availability of servants and wet nurses, and helping amorous couples by delivering their love letters). Payno wrote *Los bandidos del Río Frío*, the novel that, for some, serves as the endpoint of *costumbrismo* as a genre. A pot-boiler that kept people on the edge of their seats waiting for more; an imaginative yarn based on true crimes and real events in the history of the republic; a foundational fiction whose characters knit Mexicans together both through their common speech, customs, and habits and in their movements across the length and breadth of the country; and a meditation on past and future by means of an insistent focus on inheritance, birthright, destiny and fate, both of the characters that trample across its pages as well as of the country they inhabit, *Los bandidos,* published in monthly installments in periodicals as it was written between 1889 and 1891, lends itself to many readings. Whichever interpretation one prefers, the novel is, as Anne Staples has argued, second to none as a source of information on customs, the intimate life of families, geographical descriptions, domestic relations, political life, and the character and habits of a broad range of social groups, in short, on nineteenth-century *vida cotidiana* (Staples, 2001).

Payno also continues to develop his earlier interest in "types" that we have seen dating to the lithographs and literary periodicals of the 1840s and 1850s. The novel is, in fact, set in this earlier period, taking up the actual operation of a criminal ring by a certain Colonel Yáñez, a high-ranking official during the time of Santa Ana. That the novel

draws on actual figures and real events from the nation's past has, in part, been responsible for its allure to historians, who have both written about the novel as "virtually true" or as a form of "parahistory" and, in at least one instance, found it a long-term source of fascination in attempting to identify its characters with the "real-life" figures to whom they correspond. Such "real" or, at least potentially real, figures also come, under Payno's direction, to embody not only unique characteristics that typify the region from which they come but also, simultaneously, through the alchemy of metonymy, to bring into being that very region. The chapter in the novel discussing the yearly trade fair at San Juan de los Lagos is particularly revealing in this regard. After enumerating the products from which various regions are known—prized mules from Tamaulipas, sheep with thick white wool from New Mexico, sweet potato candies from Querétaro, among others—Payno turns his attention to the traits, qualities, and characteristics as well as to regional markers like clothing that distinguish the women who dared to make this trip. Here, a woman of the northern frontier, skin white as alabaster with abundant black hair, dressed in a tight-fitting blue suit that reached to her collar, came face to face with, among others, a stout china *poblana*, bedecked in double or triple petticoats with *rebozo* on her shoulders and her arms bare, the first composed and cool and the latter more lively and zestful, two of many regional types on display. So avowedly were they the essence of a particular place, as well as its most compelling representation, they seemed, according to Payno, to be from different and distant countries, as removed from each other as Paris from Berlin, yet fashioning through the bringing together of these unique parts, the single whole of the nation.

It is precisely this description of the fair at San Juan de los Lagos that Guadalupe Monroy draws upon to write her contribution to the *Historia Moderna de Mexico*, the multi-volume work published in the 1950s that served to reestablish history as a modern discipline in Mexico. In "Compensatory Pastimes" a section in the third volume dealing with the Restored Republic, Monroy has no interest in contributing to a discussion of "types," but rather in setting out the range of diversions available to various publics, from the glory of the theatre during the empire of Maximilian to the popular big tops (*carpas*), seamy theatres (*teatruchos*), circuses, and puppet shows of Mexico City and the local fairs of the countryside during the 1860s and 1870s. In these popular urban locales, she argues, the broader public—comprised of poor and working people—took great pleasure in such things as the rhyming verses (*décimas*) that clowns would direct at women, mothers-in-law, social vices, to those unhappily married, and even at politicians. In the smaller towns of the countryside, like that of San Juan de los Lagos, the arrival of a fair would, as in the great opera *Sonámbula*—performed by Angela Peralta the "Mexican songbird," that captivated more cultivated audiences of that time—lead to an awakening "as if from a deep sleep," thus providing a small consolation for the daily monotony of work in the mines or fields.

In the themes its contributors took up, as well as in the approaches they adopted, the *Historia Moderna de México* built on the previous work of the *costumbristas* and others in the nineteenth century while pointing toward the future by setting out much of the research agenda of those both in Mexico and abroad that subsequently became interested in cultural history and daily life. As discussed by Daniel Cosío Villegas, general editor of the work, in the forewords to the various volumes written in the mid-1950s, the *Historia Moderna* was envisioned as a six-volume work, three each on the Restored Republic and Porfiriato, with each of the three organized around political life, economic life, and the social life of their respective period. Cosío Villegas pointed not only to the

lack of attention that had been paid to the Restored Republic but also to the general decay of interest in history in general, a consequence of the Revolution and the resulting need to focus on urgent national problems in the present and the immediate future. Seeking to rewrite the still-dominant Porfirian narrative that saw nothing but chaos before Díaz arrived to impose order and progress, Cosío Villegas positioned the Restored Republic instead as an era of transition between the formative years and what he referred to as the "ordered" and ultimately "funereal" regime of the Porfiriato. As for that later epoch, its defining characteristic was that of "individualization," that is, the replacement of the shapeless and static mass of the group or class with the emergence of the individual—isolated, particular, and with his or her own will—no longer simply a part of some larger entity.

Resulting, in part, from the spread of the means of mass communication, the individual was both brought into being through, as well as being the consumer of, new forms of writing, one of the techniques of which was adopted by Emma Cosío Villegas in her contribution to the volume in this collection on the Restored Republic entitled "Daily Life." Moving through the spaces of the city taking in all encompassed by her gaze, much like *cronistas* such as Manuel Gutiérrez Nájera in the burgeoning press and their works of fiction, Emma Cosío Villegas describes the traditional plates of delicious home cooking and then follows families from their breakfasts to their strolls in the morning air in the Alameda. Her chapter—divided into sections dealing with life outdoors; house, food, and store; *paseos*, civic festivals, and restaurants; dances; and Holy Week and religious festivals—chronicles such things as courtship practices, accomplished through the strategic use of *rebozos* and *sombreros*, popular decorations and preparations by which means people made official celebrations their own, and the emergence of the particularly national female figure of the *china*, "brown-skinned, with dreamy eyes, red mouth, fresh and sensual, flexible and well formed in body, lover of independence and wholesome in every sense," the proud expression of which was her traditional attire.

Although the subsequent volume of the *Historia Moderna* dealing with the Porfiriato does not have a section on daily life, the third part of that work, entitled, in Spanish, "Moral Social" (Social Well-Being), takes up many of these same themes. In sections on "Friendship and Love," "The Sin," and "Penitence," gender is introduced into history and added to the discussion of daily life, as in the description of the proper attributes of a *señorita decente*, including, along with skills in artificial flower arrangement and training in drawing and piano, competence in household tasks, the ability to comply with the principles rites of Catholicism, and being "fashionable." Women's work, including prostitution, is also considered, as is the increase in abduction (*rapto*) as a means of accomplishing the formation of couples, all as part of a broader discussion of what the author characterizes as the growing crisis of decency (*pudor*) during the era. Nor is masculinity overlooked as a subject of study, with attention paid to duels, bandits, and criminality all within a context that considered what it meant to be "*muy hombre*." A subsequent section of the volume, Part Five, entitled "The Leisure Hours," focuses on sports and the circus, bullfights, opera and good music, and, of course, the frivolous genre, especially puppets, including the company associated with the famous Rosete Aranda family, described as "the most popular spectacle, and, of course, the most genuinely national one."

Along with including specific sections dealing with daily life, the *Historia Moderna* also featured the work of a historian whose subsequent writing, focusing resolutely on the local and everyday, did much to establish microhistory as a field of inquiry not only

in Mexico but also more generally. Luis González y González, in his extensive contribu-
tions to the volume on the Restored Republic, sketched out the broad parameters
framing the entire study, beginning with a consideration of the relationship between
Man and the Earth, in the first part of the volume, followed by a discussion in parts two
and three, respectively, first of the indigenous subsoil and subsequently the social scale,
with emphasis on *campesinos* and the urban proletariat. Some of the themes treated in
these sections included the effects of the land on the people and the identification of four
principal elements influencing life in more urban areas, those of the market, the church,
the town hall (*casa municipal*), and the gathering of abodes into groups or communities.
As for life in the countryside, *campesinos*, according to González y González, recognized
three places as their own—the particular locality where they had been born, the colonial
past, and the world beyond the grave. Distinct from structures in the cities, the cabins of
the poor, Catholic churches, and the big houses of the haciendas organized human life.

   Many of these themes were furthered elaborated in his later works, perhaps the best
known of which, to both Spanish- and English-speaking readers, is *Pueblo en vilo* (*San
José de Gracia*, in English) published in 1968. Here the intimate relationship between
nature and human life continues to predominate, leading González y González to focus
on such things as the mountainous landscape, isolation, weather and other annual cycles,
and the prominence of a snowstorm and a volcanic eruption in defining the meaning of
life for entire generations. He documented the impact of the arrival of the market econ-
omy and money, and the founding of a town that not only had an impact on the daily
lives of *rancheros* and the everyday work carried out by women (and on masculine pre-
rogatives), but also contributed to the rise of political passions. Change over time in this
community was not only associated with natural events but was also marked generation-
ally as well as by class. As put into practice by this author, microhistory not only narrates
the local and everyday for its own sake, but uses them as tonics to nationalist narratives
and histories, decentering such official formulations by seeing such events as the
Revolution, in one example, as an outside imposition rather than an event shared equally
throughout the nation to which different generations had distinct reactions. In a similar
fashion, the author views the Cristero Revolt, that did not figure prominently in the
historiography of the time, as a response to the violation of deeply held beliefs and daily
practices.

   In the last section of his book, concerned with the 25 years of change preceding its
publication, González y González delivers on the promise of microhistory, making
apparent the close intertwining of everyday life with the broader structural and economic
changes underway in the community. While framing the narrative as one of increasing
class conflict, with the upper crust pitted against the underdogs, out-migration, and
acculturation or modernization both of selves and homes—captured pithily in his asser-
tion that people were beginning to be "offended by the odor of armpits," (p. 233)—the
analytical punch of these categories comes from the close attention to the everyday.
"Class," for example, as much an economic category expressed in relationship to owner-
ship of land, is experienced in gendered terms, including the diminution of patriarchy
and the improvement in the conditions of women—manifested in changing attitudes
and practices concerning love including the decline of female abduction or rapto, work,
birth-control, education, and power within the family. All of these practices and divisions
are mediated through language, especially proverbs and sayings, to which González y
González pays considerable attention, as have many cultural historians subsequently.
New forms of mass communication, especially radio and television, also figure as variables

in their own right, leading people to become more interested in watching *Cantinflas* than seeing the rare appearance of a Bishop in their community. Both a history of changes in everyday life and their expression through language and mass mediation, as well as an argument about the "transition" (nearly completed, according to the author) in class relations, gender, modernity, and feelings of national belonging, *Pueblo en vilo* both disrupts national narratives and establishes daily life as essential to an analysis of power.

If the "transition" to more uniform versions of modernity and national identity had almost been completed in San José de Gracia by the late 1960s, the relationship between everyday life and nation building has continued to occupy historians to the present day. In fact, under the impetus provided by the linguistic turn, with its concomitant shift from social to cultural history of various inflections including a growing interest in the discursive construction of gender, race, sexuality, national and other identities, the interest has grown, even as the category of the "everyday" has taken on new meanings and been asked to shoulder different and at times even contradictory analytical burdens. More than the local details that belie the national narrative of the official history, the everyday, in the hands of some, has been seen as a powerful location for creativity and critique, through practices like the folk humor of derisive *décimas* of the big top discussed above, where the official portrayal of the world can be teased out for inspection and modified or found wanting and new perspectives and even language itself can be generated. At the same time, others have returned to the themes of daily life set out by those contributing to the *Historia Moderna*, finding in the foods, fiestas, and fandangos the stuff of the national. While, at times, the predominant concern has been with the role of official celebrations and ceremonies in imagining the nation, others have found in everyday habits, routines, and ways of being the embodiment of the national.

In his work on the relationship between cuisine and the formation of national identity, Jeffrey Pilcher samples both everyday fare as well as festive, even patriotic, dishes. Whereas in *!Que Vivan Los Tamales!: Food and the Making of Mexican Identity* (1998), he explores the forging of a national cuisine through cookbooks published in the nineteenth century, as well as the blending of elite and popular tastes and the inclusion of regional dishes in what he refers to as the "revolutionary culinary nationalism" of the twentieth, in *The Sausage Rebellion: Public Health, Private Enterprise, and Meat in Mexico City, 1890–1917* (2006), he charts the struggle of shoppers to preserve their access to freshly slaughtered meat in the face of changing technology and business practices. Whether concerned with *puros frijoles*, an everyday mainstay, or *chitos* with *salsa borracha*, the festive food consumed by the poor on saint days—especially that associated with the Virgen de Guadalupe on December 12—or *mole poblano*—Mexico's national dish—Pilcher attends not only to shared tastes but also to differences in access to food imposed by class, gender, and ethnicity. He highlights a new analytical category, that of the consumer, an identity that is at the center of the recent work of Steven Bunker. In *Creating Mexican Consumer Culture in the Age of Porfirio Diaz* (forthcoming), Bunker explores the cultures of consumption, their relationship to modernity, its spectacles and discourses, and how individuals and groups utilized these cultures to construct individual and group identities to situate themselves and others in the rapidly changing context of daily life in turn-of-the-century Mexico. John Lear too has seen in consumption demands an important component in the mobilization of working people in revolutionary Mexico City, where women workers especially established links between work and community.

Perhaps no single historian has been more central in exploring the relationship between everyday life and national imagining and in setting the research agenda in this

field, through his own publications, the co-editing of work with other scholars, as well as in the training of graduate students (having supervised some 27 doctoral dissertations at last count, including those of both Jeffrey Pilcher and Steven Bunker mentioned in the previous paragraph), than William H. Beezley. In *Judas at the Jockey Club and other Episodes of Porfirian Mexico*, one of the pioneering works in Mexican cultural history published in 1987, "traditional" Mexico and those imbued with the Porfirian persuasion—that ethos of modernization taken up by many of the elite—confront each other in a number of everyday venues, including the bull ring, at sporting events, at work, and in longstanding celebrations like the Judas burnings from which the book takes its title. Seeing in travelers' accounts a means of accessing descriptions of everyday life, such as food, clothing, housing, celebrations, and family arrangements that those living in the society often took for granted and therefore often failed to remark upon, Beezley finds in such activities—in addition to a great deal of merriment—potent zones of meaning making, identity formation, and, especially, social critique. While the Judas burnings sponsored by the Jockey Club on Holy Saturday in 1893 had taken the form but not the spirit of the carnivalesque, those of 1908 in one of the capital's more popular and plebeian neighborhoods certainly brought into being a world that was substantially more topsy-turvy, mocking the aging dictator and his policies through the burning of richly symbolic figures like a devil, a wild boar, and a billy-goat. If this potential for a world turned upside-down was seen as fast dwindling in the face of encroaching modernization, a growing body of literature, inspired in large part by Beezley's work, has taken two parallel approaches. One, stressing precisely the opposite, finds the political in the popular almost everywhere, while engaging with, modifying, and critiquing the terms within which the discussion of culture and everyday life takes place. The other, seeing power as only one among several interpretive possibilities, finds in the everyday a broad popular repertoire that people might draw from to imbue the ordinary events of their lives with drama, color, and excitement.

Two compilations of collected essays, both published in 1994, attested to the gusto with which the cultural turn was being taken, establishing the popular and the mundane as central to discussions of power and meaning while reconceptualizing the political itself as inextricably enmeshed with everyday life. In *Rituals of Rule, Rituals of Resistance*, co-edited by William H. Beezley, Cheryl E. Martin, and William E. French, lewd songs and dances, workplace practices, life on the street, theater and other performances, and village bands, among other activities, all become targets of the moralizing and disciplinary efforts of church officials, factory owners, municipal regulators, police, and national policymakers. A common theme linking the ceremonial and more everyday rituals, comprising one of the major concerns of those contributing to the volume, is their centrality as performances that assert and contest power. As the field of possible sites for constituting and contesting identities, meanings, and power expanded, seemingly without limit, in the work of those contributing to *Rituals* and others, so too was power itself coming to be seen in the everyday construction of gender, sexuality, race, and national belonging.

Nowhere was this more apparent than in the essays gathered in *Everyday Forms of State Formation*, co-edited by Gilbert M. Joseph and Daniel Nugent, also published that same year. Reworking understandings of hegemony and utilizing the insights of theorists such as James Scott, on the one hand, and Philip Corrigan and Derek Sayer as developed in *The Great Arch*—their work on English state formation as cultural revolution—on the other hand, contributors to this volume probed ways to conceptualize the relationship

between popular culture and the national regime; seeing "the state" less as a thing and more manifested in categories, ideas, and subjectivities working from within, with the ways the world was made sense of at the level of the everyday.

Contributing to this emphasis on the constructed character of such analytical concepts as subjectivity, as well as helping to provoke a reconsideration of some of the categories taken up by historians interested in the popular and the everyday, approaches associated with the history of gender and sexuality began influencing the debates in cultural history at this time. Discussed extensively in a number of other venues (as in the 1999 Special Edition of the *Hispanic American Historical Review* dedicated to the New Cultural History), the work of gender historians from the early 1990s helped emphasize the contentious nature of many aspects of daily life, seeing culture as "argument" rather than as fixed or universal, with gender rights, patriarchy, and honor, among other things, actively contested rather than fixed in stone, and intimately enmeshed in any discussion of power. As Ana María Alonso argued in *Thread of Blood: Colonialism, Revolution and Gender on Mexico's Northern Frontier* (1995), it was necessary to move beyond a focus on institutional or formal politics to pay attention to the "politics of everyday life," to the effects of this power on bodies and selves in order to understand resistance, her topic of study. In my book, *A Peaceful and Working People,* published the following year, contestation over everyday habits of work, manners, and morals comprised the practices upon which the framework for rule was both asserted as well as measured and found wanting. In these works, as in many others, previously coherent and bounded categories like "culture" came under stress while the quotidian became the site where power was played out, in struggles over bodies and selves, in the imaginings of genders, ethnicities, sexualities, and national and other identities. In the Introduction to *Gender, Sexuality and Power in Latin American since Independence* (2007), Katherine Bliss and I take stock of much of this literature, seeking to explain what has been at stake in this writing as well as the ways in which the questions it has generated have become central to almost any analysis of history.

Since the mid-1990s, "everyday life" as an analytical category or focus has helped to shape the contours of a veritable whirlwind of historical writing, work that both continues to draw upon and develop the insights of historians of gender with conceptualizing power, and those of popular culture with understanding meaning-making, social critique, and personal agency, and that extends these insights into new areas of study and in new directions. In *Fragments of a Golden Age*, an important edited collection published in 2001, editors Gilbert Joseph, Anne Rubenstein, and Eric Zolov and their contributors not only usher in post-1940 Mexico as a field of historical study but do so by showing how the numerous "contradictions and nuances" embedded within the daily life of the period, seen in such activities and forms of mediation as mass consumption, tourism, illustrated magazines, movies, wrestling, rock and the televisual, together accrete a critical mass sufficient to topple the familiar narrative through which the post-1940 period had heretofore been explained. The volume builds on, as it highlights, the contributions made by those individual historians involved in the project, including those of Rubenstein and Zolov who, in *Bad Language, Naked Ladies and Other Threats to the Nation* (1998) and *Refried Elvis: The Rise of the Mexican Counterculture* (1999), chart, respectively, the role of comic books and rock and roll in daily life and in shaping understandings of modernity, citizenship, gender, mass mediation, and identity. Their work, alongside that of a number of others gathered in the volume, including Jeffrey Pilcher, Alex Saragoza, Seth Fein, Steven J. Bachelor, and Mary Kay Vaughan, as in their

own publications, convincingly establishes the increasingly transnational context within which such daily lives were and are being lived. Arguably the most important new direction is that the nation state is no longer presumed as the unquestioned unit of analysis nor as the undisputed framework for the writing of history.

If the transnational offered one new conceptual framework within which to situate daily life, the everyday also proved instrumental in the creation of new sub-genres of historical writing and in breathing new life into already established ones. In the realm of political history, for example, concern with formal institutions and practices has given way to a more expansive definition of what constitutes the political with the inclusion of culture and the everyday as part of any discussion of power and the state. In *Peasants, Politics and the Formation of Mexico's National State: Guerrero, 1800–1857* (1996), Peter Guardino places peasants at the center of state formation and struggles over the definition of the state in the early nineteenth century. Jeffrey Rubin attempted to do just that the following year, in *Decentering the Regime: Ethnicity, Radicalism and Democracy in Juchitán, Mexico* (1997). That is, he tried to decenter the regime as well as the existing historiography written about it by linking everyday experiences of work, family, gender, and ethnicity, with all their ambiguities and contradictions, with politics and social movements, especially the rise of Coalición Obrera, Campesina, Estudantil del Istmo (COCEI) in Juchitán, Oaxaca. That same year, Mary Kay Vaughan's *Cultural Politics in Revolution: Teachers, Peasants and Schools in Mexico, 1930–1940* (1997) stressed the negotiations between state and local actors over the meaning of such things as nation, modernity, citizenship, and history as a means of decentering—if we might borrow Rubin's term—the concept of state itself. Likewise, Adrian Bantjes in *As If Jesus Walked on Earth: Cardenismo, Sonora and the Mexican Revolution* (1998) stresses not only the centrality of negotiation between local and national actors, but also the diversity and extent of local participation in a politics premised upon everyday ethnic, regional, and religious considerations.

Explorations of popular devotion have been at the center of a revival of interest in the history of religion and popular religiosity. Here, the work of Paul Vanderwood has been pioneering, both in its choice of subject matter as well as in the manner of its presentation. In *The Power of God Against the Guns of Government: Religious Upheaval in Mexico at the Turn of the Nineteenth Century* (1998), Vanderwood situates the Tomóchic revolt of 1891 within the context of religious revivalism and millenarian revolt swirling around the figure of Santa Teresa de Cabora and everyday life in Porfirian Chihuahua. With colloquial language, invented dialogue, and evocative detail, the author not only attempts to capture a flavor of the times and place, but does so in a language more attuned to the contemporary vernacular or everyday. In a subsequent work, *Juan Soldado: Rapist, Murderer, Martyr, Saint* (2004), Vanderwood returns to the terrain of popular belief, this time in order to understand how a "despicable criminal" can become a "revered saint" (p. 200). Here he stresses the creative and continuing reinvention of the cult of devotion around this figure, full of personal touches and rooted in local circumstances, drawing not only on personal testimony but also on the experience of his own visit to Cemetery Number One in Tijuana in the year 2000 on June 24, the day in which the largest number of devotees come to pay their respects. This same creative recombination of already existing aspects of everyday Catholic practice and local structures of belief and organization is also apparent in the founding of lay devotional movements in rural Oaxaca during the late nineteenth and early twentieth centuries. As Edward Wright-Rios shows in *Revolutions in Mexican Catholicism: Reform and Revelation in Oaxaca, 1887–1934*

(2009), it was precisely this grounding in existing liturgies, traditions, vocabularies, pilgrimages, healing based on images, and organizational structures associated with *mayordomías* that enabled one such movement, that associated with the Lord of the Wounds in Tlacoxcalco, to endure when others—like that around La Virgen de Ixpantepec whose appearance in a grotto to a young Chatina seer, Dionisia (or Nicha), led her to be referred to as the second Juan Diego—did not. In both cases, the central role of a leading female figure allows Wright-Rios to also explore the construction of what he refers to as "female pious agency." All recent work owes a debt to Pamela Voekel who, in *Alone Before God: The Religious Origins of Modernity in Mexico*, anticipates the recognition of the centrality of religion to culture and the everyday.

The history of crime and criminality is also being rewritten, drawing new attention to both everyday practices and contexts as well as to the discursive construction of both crime and criminals. In her work, most notably *Crimen y castigo* (2002), Elisa Speckman offers not only a history of changes in criminal legislation and its implementation between 1872 and 1910 but also a close look at the literary portrayal of criminals, of the increasingly pervasive practice of turning crime into text for the diverse and growing publics being written into existence by those contributing to the dailies, penny press, broadsheets, and flyers. Robert Buffington also highlights the work accomplished by the discursive division of Mexicans into criminals and citizens in his aptly named work, *Criminal and Citizen in Modern Mexico (2000)*, stressing the centrality of constructions of race and gender to the process of national imagining. Likewise, in *City of Suspects* (2001), and in his contribution to *Crime and Punishment in Latin America*, edited by Ricardo Salvatore, Carlos Aguirre, and Gilbert M. Joseph and published that same year, Pablo Piccato directs his gaze toward the daily lives of the urban masses, seeing not only everyday life but also the perspectives of the popular classes as essential to the discursive construction of crime and criminality. It was as if, as James A. Garza states in *The Imagined Underworld* (2007), crime and order needed each other.

Inhabitants of Mexico City (and readers everywhere) have also been fortunate in having as their champion in print a historian who has found in detective fiction a powerful genre for ventilating official narratives, while writing the city itself, along with its more popular residents, into existence as historical actors and agents in their own right. Featuring the hard-boiled, one-eyed, Basque-Irish-Mexican detective Hector Belascoarán Shayne, author Paco Ignacio Taibo II, in novels like *Cosa fácil*, originally published in Spanish in the 1970s but more recently available in English, engages with many manifestations of the popular, the language and slang of *chilangos*, their foods and pastimes, with wrestling, *mariachis* and the media; finding in late night radio, for example, a means of forging a community of people who are empowered to act as subjects in their own lives rather than to exist as victims of corruption, crime, or the chaos of the modern city.

No single author has been more important in giving expression to such rituals of chaos, or been more influential in interpreting their history, than Carlos Monsiváis. Chronicler, commentator, columnist, cultural historian, and co-conspirator, Monsiváis has for more than 50 years written extensively for radio, magazines, daily newspapers, and periodicals; contributed essays and introductions to the work of others; and authored a series of books touching on subjects that cover the gamut of everyday life, ranging from Porfirian poetry to live sex shows in contemporary Mexico City, not only paying careful attention to the various genres of representation—be they letters (*El género epistolar: Un homenaje a manera de carta abierta*, 1991), poetry, boleros, radio, cinema, melodrama, or telenovelas (*Escenas de pudor y livianidad*, 1981)—but also crafting one

of his own by means of his column in *Proceso* through combining various "voices" in a single text to offer devastating critiques of the iterations of the powerful or, at least, those who presume to be. Although daily life is caught up in almost all of Monsiváis's writing (and vice versa), his recent study of a movie idol, seemingly so far from the everyday in its preoccupation with the fantasy world portrayed on the big screen, nevertheless offers insights essential to understanding the relationship between modes of representation and the reality they simultaneously reflected and brought into being. In *Pedro Infante: Las leyes del querer* (2008), Monsiváis turns his focus to the "Golden Age" of cinema, more than 30 years of movie production following the nation's first "talkie" filmed in 1932, seeing in this outpouring not only a source of information on the everyday—the profound as well as superficial beliefs of these decades, including modes of living, manners of speech, notions of beauty and of vulgarity, such as humorous sexual innuendo—but also the creation of a vigorous popular culture, the adoption of melodrama, and the framing of a visual panorama of the nation as a single entity, one not based on laws, politics, Catholic morality, or History, but one that emerged from the collective enthusiasm for what Monsivais identifies as the visual and aural fantasy that contained landscapes, customs, modes of speaking, dress, and traditional attitudes that in some way recalled those of Mexico. For the purposes of this chapter, what Monsiváis illustrates is how the categories of "the people," "the public," and, perhaps, by logical extension, "the everyday," are themselves nothing other than inventions or constructions, part of a *México fílmico* in which "the people" imitated the "hallucinations and chimeras emitted in its name, and the fantasies reproduced the behavior of its imitators" (p. 76), all the while marrying commercial success with a sentimental nationalism premised upon idealized visions of family, morality, and gender roles.

Indeed, it is not by accident that Monsiváis has been a major contributor to new publications on the history of gender and sexuality, much of it concerned with the everyday. His chapter in *The Famous 41: Sexuality and Social Control in Mexico, 1901* (2003), co-edited by Robert McKee Irwin, Edward J. McCaughan, and Michelle Rocío Nasser, reflects on the paucity of knowledge about gay life in Porfirian Mexico as well as on the politics linking past and present persecution of homosexuality. In fact, most of the contributors to the volume concern themselves specifically with the discursive production of various kinds of knowledge about sexuality. Robert Buffington's chapter on homophobia and the working class stands out in this regard, as well as the chapter by Cristina Rivera-Garza on doctors and inmates of the General Insane Asylum, La Castañeda, during the late Porfiriato. Here, Rivera-Garza builds on her earlier dissertation and novel *Nadie me verá llorar* (1999), translated as *No One Will See Me Cry* (2003), in which the voices of prostitutes and those considered insane fully participate in the creation of medicalized discourses about themselves and their bodies. Her work highlights the fragility of these dominant discourses while revealing the everyday to be not so much how things really were but as contradictory, contested, and discursively constructed. The same attention to the body as a site of debate, contestation, and performance characterizes Gabriela Cano's contribution to *Sex in Revolution: Gender, Politics, and Power in Modern Mexico* (2006), edited by Jocelyn Olcott, Mary Kay Vaughan, and Gabriela Cano (with the Foreward by Carlos Monsiváis). Here, Cano offers the poignant example of Amelio Robles, a transgender individual whose construction of a masculine body image and social identity with the cultural resources at hand was subsequently co-opted in the service of discourses stressing the importance of women to the Revolution. In this case, the "everyday" is not so much a site or a place, but the cultural resources that can be

brought to bear in order to "perform" gender and sexuality, or, as was the case after Amelio's death, to appropriate such performances and re-inscribe them within dominant paradigms.

Contributors to *Sex in Revolution* have also been among those at the forefront of writing the history of women through the lens of everyday life. This has partly been the result of the insight articulated by Joanne Hershfield in *Imagining la Chica Moderna: Women, Nation and Visual Culture in Mexico, 1917–1936* (2008), that is, that the burden of everyday life has seemed to weigh particularly heavily on women. Drawing from extensive interviews and oral histories, Heather Fowler-Salamini offers a grassroots perspective on the gendered process of working-class formation in the coffee export industry in revolutionary Veracruz. Rejecting their portrayal in the pejorative terms of stereotypical constructions of femininity, female coffee sorters used their own narratives to stress their honor as well as their work ethic, locating respectability in their simultaneous roles as good wives and mothers as well as sustainers of their families. Also in this volume, Kristina A. Boylan and Jocelyn Olcott write, respectively, on Catholic women's activism and women's political mobilization in the wake of the Revolution, especially around the issue of suffrage and the representations this generated. This forms part of a broader project of exploring women's activism and the gendered nature of revolutionary citizenship set out in Olcott's book, *Revolutionary Women in Postrevolutionary Mexico* (2005). Women's multiple responses to the Revolution as well as what this process may have meant to them has also been considered in *The Women's Revolution in Mexico, 1910–1953*, (2007), edited by Stephanie Mitchell and Patience Schell. Another author stressing the reciprocal relationship between material, everyday realities, and the discursive representation of working women is Susie Porter, who, in *Working Women in Mexico City: Public Discourses and Material Conditions, 1879–1931* (2003) explores the impact of industrialization and revolution on women, women's work, and constructions of gender.

Drawing from the insights of these works on the history of women, as well as from those on the history of the family, one strand of recent writing has focused attention on the emergence of new discursive categories, such as that of the adolescent, and taken up the question of the history of children and childhood directly. Ann S. Blum, in *Domestic Economies: Family, Work, and Welfare in Mexico City, 1884–1943* (2009), finds in social reproduction—which she defines as the "creation, sustenance and socialization of new generations"—a means of bringing together a number of approaches to the history of women, family, gender, medicine, public health, and labor that scholars like Katherine E. Bliss in *Compromised Positions* (2001) and Claudia Agostoni in *Monuments of Progress* (2003) have helped pioneer. Such a concept also provides Blum with a way of bringing everyday life and the multitude of changing discourses swirling around childhood and the family into the same analytical framework. She draws on sources generated by a wide variety of institutions and organizations, including the Casa de Niños Expósitos, the Hospicio de Niños, and Mexico City's juvenile court, to show not only how the contested and controversial concept of the "revolutionary family"—premised as it was on traditional gendered divisions of labor as well as a class-based hierarchy of work within the household—became central to imagining modern national identity, but also the ways in which such constructions clashed with popular understandings and practices concerning work, childhood, and the family, especially the essential expectation that labor would figure centrally in the construction of family bonds. The family is also prominent in Ana Lidia García Peña's, *El fracaso del amor: Género e individualismo en el siglo XIX mexicano*

(2006), a work concerned with the gendered consequences of the liberal campaign to create modern individuals, one that resulted in an increase in everyday violence against women as well as their juridical marginalization. As with much of the recent literature, the book is attentive to language—to discourses of gender, the individual, the family, and to the rhetorical construction of victimhood, seduction, and masculine honor—as well to the contestation of these tropes and the mobilization of such language by men and women of the time in pursuit of their own ends.

While *costumbrista* novelists and lithographers of the nineteenth century found in the contours of everyday life the "types" out of which a national identity might be crafted, the relationship between popular forms of expression—the people's foods, fairs, and fandangos—and national imagining has continued to draw the attention of scholars of the past up to the present. Perhaps no one more so than Ricardo Pérez Montfort, whose numerous essays on popular expressions and cultural stereotypes, gathered in several books published over the last 20 years, have helped set the agenda for research in this area. Defined as a contested term, as a series of representations, values, and characteristics identified through spoken language, music, in dress as well as food, in productive as well as leisure activities, a stereotype can be both generated and adopted by the group producing it on the one hand, or imposed as a form of hegemony linked to state power and forms of mass mediation on the other. As Pérez Montfort shows, the relationship between the two forms has a history, one which, as he traces, led to the emergence, or even invention, in the 1920s and 1930s, of the *charro* and the *china poblana* dancing the *jarabe tapatío* as the dominant representations of Mexicanness from among a great many possible regional figures, the result of the political discourse of the time, along with the interactions of various elite and popular actors as mediated first through popular theater and then, more importantly, through film. Along the way, readers of his work not only learn a great deal about popular celebrations, foods, music, and representations from which such stereotypes were drawn, but also come to see everyday life as a form of politics with popular groups as actors in their own right, agents in the generation and shaping of such things as vernacular nationalism.

Perhaps no single activity was more important in making such folktypes or stock characters known across the country than the public performance of puppets, one of the principal preoccupations of William H. Beezley in *Mexican National Identity: Memory, Innuendo, and Popular Culture* (2008). Eschewing formal theory and embracing a good story (as is generally his wont), Beezley focuses on the popular and the performative—puppets, almanacs, children's games, lottery cards, independence celebrations—to ground in the "small deeds, rumors, and everyday matters" the stuff of national identity formation. In many ways, the book fulfills the promise of the earlier literature on rituals and celebrations of national imagining discussed above, this time by insisting that the local, the popular, the personal, in short the everyday, provided the repertoire, the images, the melodrama, and the memories for the emergence of a broadly shared national identity, one often at odds with the standardized and generic version promoted by the nation's elites. In the popular version, Beezley argues, images and performances functioned as mnemonic devices that recreated specific acts in specific places in the past, while actual individuals, such as Hidalgo, stood in metonymically in these shows for the people, their hopes, their dramas, and their experiences, in this joining of present and past, of national memory and identity. So visceral is this history that readers can almost taste the multicolored corn tortillas impressed with the national seal—such a part of Independence celebrations—touch the wooden press that produced them, hear Vale

Coyote, perhaps the nineteenth-century's most famous puppet *cantinflear* in his well-known discourse on this same event, or recall, upon seeing "el arbol de la noche triste," an image from one version of the lottery game, whatever one cared to from the repertoire of representations it called forth.

Corn, the tortilla press, and the lottery game are all objects that form part of the material culture of daily life, one of the main concerns of those contributing to a multivolume series on the history of daily life in Mexico recently published by El Colegio de México. Under the direction of Pilar Gonzalbo Aizpuru, the series' editor, the *Historia de la vida cotidiana en México*, over the course of five volumes published between 2004 and 2006, moves chronologically from the prehispanic to the end of the twentieth century and thematically from a concern with material culture to a consideration, in the final volume on the twentieth century, of normative values and attitudes through an engagement with the mass mediated images, especially photographs, that frame everyday life. The fourth book in the series, *Bienes y vivencias. El siglo XIX,* edited by Anne Staples, brings together contributors interested in various aspects of daily life taking place throughout the republic, from hygiene in Mérida (Raquel Barceló) to fiestas in Querétaro (Juan Ricardo Jiménez Gómez), from the social spaces of textile factories in Puebla and Tlaxcala (Coralia Gutierrez Alvarez) to divorce in Nuevo León (Sonia Calderoni Bonleux). Concern with the role of specific objects in material culture characterizes many of these contributions, thus situating them simultaneously within both an established historiography on material life—perhaps most powerfully articulated by Fernand Braudel in his book the *The Structures of Everyday Life*, with its emphasis on food, fashion, housing, and the pervasive repetitivity of things that are barely noticed as they constitute the everyday—and a renewed interest, as evidenced by Beezley above, in the ways people use things or material objects to make and communicate meaning, desire, and memory in the past (see the recent discussion in the *American Historical Review* [December, 2009] on "Historians and the Study of Material Culture"). Indeed, as Marie Eileen Francois, a contributor to *Bienes y vivencias*, explains in her own recently-published book, *A Culture of Everyday Credit: Housekeeping, Pawnbroking, and Governance in Mexico City, 1750–1920* (2006), just as Braudel established the links between capitalism and material culture, liberalism and the growth of the republican state in Mexico were interwoven with material culture. Her study of pawning enables her to see not only how women of distinct social classes managed, by means of maneuvering within the culture of everyday credit, social reproduction at all levels of society, but also how the role of the state changed over time, returning, by the revolution, to one that had animated it at over a hundred years earlier—that of aiming to guarantee popular access to credit.

Staples also situates the volume within the broader trajectory of Mexican historiography, specifically that established by both the *Historia Moderna de México* and the microhistory of Luis González y González discussed above. Like the latter, *Bienes y vivencias* seeks to present many histories rather than the one history of the official narrative while, like the former, Staples finds in everyday life evidence of the emergence of a new construct, not the individual freed from the routines and constraints of larger collectives but, through changes in material culture, the integration of daily life with the new concept of belonging to a national community. The volume is also united by a common preoccupation with sources, specifically focused on the question of the relationship between genres of writing and representations of the everyday. In her chapter, for example, Staples interrogates the assumptions that shaped the narratives of those historians writing in the first

half of the nineteenth century, assumptions that led them to a focus on what they hoped to see and a studied avoidance of what was being lived out on a daily basis before their very eyes. In another chapter, Leticia Mayer and Cristina Mayer probe the relationship between the novel and reality as it pertains to representations of crime in Durango. In yet another, Jesús Gómez Serrano explores what he refers to as the "cosmopolitan provincialism" of Aguascalientes, at times expressed in the poetry of Lopez Velarde and others, where the embrace of "progress" nevertheless failed to change the quaint provincialism of that city. Finally, Arturo Aguilar Ochoa finds, in one of the most important presses—that of Ignacio Cumplido in Mexico City during the first half of the nineteenth century—a world of work suspended between tradition and modernity as well as the daily circumstances under which publishing took place.

The concern with narrative modes of representing daily life moves from the wings in *Bienes y vivencias* to take center stage in the final book in the series comprising the *Historia de la vida cotidiana en Mexico*. Divided into two volumes edited by Aurelio de los Reyes, *Siglo XX, Campo y ciudad and Siglo XX, La imagen, ¿espejo de la vida?*, the final book is the product of its times—born from one of the means of mass communication: print—its chapters are organized with many others of them in mind, taking as their focus the press, radio, cinema and television, with archives, oral histories, images, film, and photographs not only as their sources but their subjects as well. Moreover, de los Reyes is adamant not only as to the centrality of cinema and the image in portraying daily life in the twentieth century (much like the novel was in the nineteenth) but also about the book's ability to be apprehended in a cinematographic manner. Although many readings are possible, he declares, each chapter an image or snapshot in its own right, when read in sequence splice together the movement of daily life across the twentieth century for our visual consumption. As if to punctuate de los Reyes' insight, numerous images are scattered through each chapter, some—as in chapters on daily life in popular neighborhoods during the Porfiriato by Elisa Speckman and on rural peasant life during the revolution under Zapata by Felipe Arturo Avila Espinosa—to illustrate conclusions that have been drawn from sources such as judicial archives and oral history testimonies. Others—as in the case of the portrayal of the social life of the elite between 1920 and 1940 in newspaper social pages by Maria del Carmen Collado Herrera, or that dealing with primary school textbooks written in indigenous languages (for the tzeltal of Chiapas, the tarahumara of Chihuahua, and the nahuatl of Guerrero), mostly in the 1990s, by Cecilia Greaves L., or that on the cartoons or comic strips (historietas) of the first half of the twentieth century by Thelma Camacho Morfín—serve as the sources from which to draw conclusions concerning daily life. Subsequent chapters, like that of Alberto del Castillo Troncoso, deal with images of childhood at the beginning of the century and the volume culminates in two photo-essays, one by Rebeca Monroy Nasr on photographs of everyday scenes revolving around various aspects of education after the revolution, and another, by Maricela González Cruz Manjarrez, on photojournalism in the Mexico City between 1940 and 1960.

Taking seriously the images in this last-mentioned photo-essay as the objects of study proves particularly rewarding, as they provide the viewer with access not only to multiple, often overlooked or even hidden, histories drawn from daily life, but also suggest how dominant visual discourses might cause such images to be read in certain ways. The images of photojournalist Nacho López utilized by Cruz Manjarrez in this chapter, for example, deploy a perspective that is highly critical of dominant institutions and power, taken as they are from the photo essay "Only the Poor Go to

Hell," shot in police stations and published in the illustrated magazine *Siempre* of June, 1954. In his extensive treatment of this photographer in *Nacho López: Mexican Photographer* (2003), John Mraz argued adamantly that the strength of López's work comes from his treatment of the poor, the dispossessed, the downtrodden as subjects, that is, as social actors in their own right and as agents in the creation of their own worlds, rather than as victims of their circumstances. By analyzing these images within the discursive contexts in which they were produced, Mraz proves able to reveal the criticism of the police, of ideas of justice, of the class system, that they implied. Such images, and others generated by portrait and other photographers with increasing regularity, have also been seen as constitutive of identity as well as critical of official representations of the world. In his book, *Visions of the Emerald City: Modernity, Tradition and the Formation of Porfirian Oaxaca, Mexico* (2006) and in his contributions to *De Oficios y otros menesteres: Imágenes de la vida cotidiana en la ciudad de Oaxaca* (2005), a book accompanied by a DVD of images of from Oaxaca's archives, Mark Overmyer-Velázquez argues that photographs, even those concerned with regulating and fixing identities, provided a means for Oaxaca City's inhabitants to imagine themselves as modern citizens and as active participants in the making of their world and to construct their own, multiple, images of modernity and their places within it. Taken together, these works illustrate not only how photographic images provide a lens, no matter how refracted, on daily life, but also on how such images came to form part of the contours of the everyday.

Finally, as few things are more common a part of everyday life than death, the extensive literature on this subject serves as an appropriate way to draw the present discussion to a close. Much of it will not be considered here, dealing as it does with a debate over the supposed essence of national character. Still, given the many ways that death has been mobilized as part of the national imaginary over the last two hundred years as well as the close association of the country itself within the global context with death, especially the celebration of Days of the Dead, it is not surprising that deathways, attitudes toward death, and the politics of death continue to command scholarly attention. In a forthcoming work on state funerals during the Porfiriato, Matthew Esposito in *Funerals, Festivals, and Cultural Politics in Porfirian Mexico* (2010), examines the creation of mindscapes and memoryscapes, and the centrality of memorialization and the commemoration of the dead to rule and statecraft in the late nineteenth century. Others, especially Anne Rubenstein, have found in the public rituals of mourning associated with the death of famous figures like Pedro Infante the making of political spectacle. Amanda López, in her recent dissertation "The Cadaverous City: The Everyday Life of the Dead in Mexico City, 1875–1930," provides the first ever examination of the everyday experience of death and dying in the capital city. In his provocative book, *Death and the Idea of Mexico* (2005), Claudio Lomnitz eschews the literature debating "lo mexicano" as well as that which sees in the political appropriation of death yet another invented tradition. Although both the state and popular culture (and, perhaps, by extension, "everyday life") figure prominently in his work, such categories are not reified and already formed before the fact, but are fluid and acted upon. In fact, Lomnitz's main goal is to show how the cultural construction of death shaped both the state and popular culture. In the process of doing so, Lomnitz illustrates how such things as the Days of the Dead, for example, moved from Church control, to popular celebration that resisted the modern Liberal regimes in the nineteenth century, to an officially promoted ritual of national identification in the twentieth. As with Lomnitz's other work, especially

the essays in *Deep Mexico, Silent Mexico: An Anthropology of Nationalism* (2001), one of his main contributions is conceptual, especially in putting categories like popular culture and everyday life into question. This tactic has also yielded valuable results when used with other heretofore commonly accepted categories. Christopher Boyer, for example, has premised his book *Becoming Campesinos* (2003) on showing how the meaning of *campesino* emerged out of the interaction of agrarian militancy and revolutionary ideologies of the 1920s and 1930s.

We have taken quite a jump in moving from nineteenth-century *costumbrista* literature to recent writing on the formation of cultural stereotypes, to increasing preoccupation with images, the visual, and the discursive production of the everyday through new means of mass communication, often in transnational contexts, in more recent times. Surveying this trajectory, one can conclude that, from being pressed into service by members of the lettered city to help forge the nation—that is, as part of an official history in the nineteenth century—focus on everyday life in the twentieth has often been seen, in however negotiated and contested a fashion, as precisely the opposite; as a means of finding in the ordinary and the mundane an antidote not only to the official national programs but also to an emphasis on institutions, great men, and impersonal forces as the most important agents of historical change. Influenced as well by a historiography that increasingly views "culture" as an argument and that has been ever-more concerned with bodies, selves, and subjectivities, the coherence implied by the term "everyday life" has given way to a conceptualization of the everyday as contradictory, contested, and discursively produced, that is, with the constructed character of the category itself. The influence of historiographical trajectories in Mexico continues to help shape writing in the present, especially in the renewed emphasis on material culture and the use of objects to communicate meaning, desire, and memory, and in the attention to the relationship between genres of writing and the representation of the everyday. While influenced by broad currents that have swept across historiographies in many parts of the world, especially the impact of British Marxist historians from the 1950s and 1960s, as well as those associated with the Annales school, the history of mentalites, and the cultural turn, writing on everyday life in Mexico has taken place within a very particular context, one in which popular participation in revolution has shaped the political agenda in profound ways, both in terms of popular demands for change as well as in the manner in which the claims to rule and political legitimacy, often in the name of "the people," have been expressed. If, as Michel de Certeau suggests in *The Practice of Everyday Life*, dominant discourses must be seen as part of the strategies of rule while everyday life serves as the tactics, the literature on everyday life demands that attention be paid to the specifics of both as well as to the relationship between the two.

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On the Street Corner where Stereotypes are Born: Mexico City, 1940–1968

RICARDO PÉREZ MONTFORT

I

Throughout the 1940s, 1950s and 1960s it was common in Mexico City's movie theaters for one or more newsreels filmed in black and white to be projected on the screen before the scheduled movie. These mini-newscasts, also referred to as "shorts," included all kinds of features on contemporary events, such as the inauguration of the Lázaro Cárdenas Dam, the meeting between Presidents Miguel Alemán and Harry S. Truman, the launching of Sputnik I, the popular dance called the twist, and Indianapolis car races. These features were alternated with what might be called "visual essays" that typically described something from everyday life at that time. A work activity or pastime, a folk art tradition, or a particular place in Mexico's geography all served as topics for these mini-documentaries in which images were combined with some instrumental music— like the early André Kostelanetz or Xavier Cougat orchestra pieces—and a commentator's voiceover.

One of these cinematographic essays produced in the late 1950s spoke of three classic monuments in Mexico City and their histories. The three symbols, as told in the *official*, nonsensical voice of the narrator, " …are like Mexico's yesterday and today, the history of stone and water, in bloom and with hope for the future. … " The images showed various angles of Miguel Noreña's statue of Cuauhtémoc that was created in the midst of the "academic indigenism" of the 1880s. Then it featured Manuel Tolsá's equestrian sculpture of Charles IV erected toward the end of the 18th century and the early 19th century, which has served as a fundamental urban reference point, with the popular name of "El Caballito." And finally the short presented a filmed sequence of the "La Flechadora" fountain, better known as Juan Olaguibel's "Diana Cazadora," which because of its "daring" nudity, had caused something of a scandal when it was exhibited as a public monument in the mid-1940s.[1] These three monuments, all located at different roundabouts on Paseo de la Reforma, designed to lighten the still-minimal vehicle traffic at intersections along this spacious avenue, had been created in different time

periods and for different reasons. They seemed to sum up the roots of the "Mexican *mestizo* culture" proudly disseminated through post-Second World War national "developmentalism."

In this way, through the visual and symbolic interpretation of that particular cinema-feature, Mexico or "Mexicanness" was presented as a product of a great mixture of "pre-Hispanic culture" and "Spanish culture," leaning toward universality given the recognition of the values of the Greco-Latin West. With the combination of cinematographic language and hyperbolic text, what was reproduced in the feature was at that time a constant element in official discourse and to a significant degree in the discourse used by the rising middle classes in Mexico City. That element was nationalism which, although it continued to be preceded by the adjective "revolutionary," did not seem to conceal a profound underlying conservatism. This conservative nationalist discourse consisted of laying claim to so-called "Mexicanness" or "national pride" with a clear tendency toward establishing a type of "civil religion" in which all Mexicans were compelled to pay tribute to the flag, national symbols, and heroes, since those symbols and heroes were considered to be the "very soul of the homeland." Nationalism came to be confused with patriotism, and the latter often led to a somewhat crude version of values and symbols that provided the content for what came to be termed "patrioterism." "The National Hymn, as well as *Enseña Patria*, and all the patriotic symbols, should not be overly or indiscreetly used in public"— stated a semi-official publication in 1952—"since too frequent use diminishes the emotions they provoke and even transforms what should be a profound tribute from one's soul into a routine, tedious practice that can damage their meaning: THE SACRED NOTION OF HOMELAND, LOVE FOR THE BLESSED LAND THAT WITNESSED OUR BIRTH…".[2]

Nationalism had been one of the ideological hallmarks of the Revolution, and its search for the "essence" of "Mexicanness" extended from the revolutionary years of 1915 to 1920—in the midst of the reconstruction of the country and its institutions—to the early 1960s when what was termed "developmentalism" was consolidated. As with all such expressions, Mexico's nationalism was filled with historic references, dogmas and absolute truths, and tended toward a more determined way of confronting what is "foreign" and "unrelated to Mexican reality."

In Mexico City, national institutions opted to sanction and boast of the nation's "own values" and aspects "…that are the pride of all Mexicans." Nevertheless, since the very founding of this city, it had accommodated in its complicated geography an infinity of inhabitants with very different origins from those proposed by the individuals who simplified the concept of "Mexicanness."[3] In the 20th century it was not only the combination of the famous "two races"—the Indian and Spanish—that comprised the enormous social spectrum inhabiting the metropolitan area. Even when there were efforts to disregard what is now referred to as the "third race," the black component of the population was also timidly emerging into the native racial spectrum of what was considered "Mexican." In addition, other European nations like France, the future Germany, England, Italy, Hungary, Poland and Greece, as well as some suppliers of non-European migration like Lebanon, Russia, China and Japan, together with various Central and South American countries, all added their complex facets, in a fairly constant rhythm, to the already numerous indigenous and Iberian Peninsula peoples. Another significant current was composed of citizens from the United States, the emerging northern neighbor that seemingly had nowhere else to go but to continue advancing south, while

Mexicans continued to inhabit the north. In short there were many racial and national origins of the increasingly intense human concentration in Mexico City.

By the early 20th century the population in Mexico City referred to as "foreign" reached a total of just over 13,000 inhabitants. After the 1920–30 revolutionary period, the number of "foreigners" had increased to around 45,000. The official figures for the decade of the 1950s showed an apparent decrease in this population to only 25,000, but a change in criteria defining 'foreignness' was surely responsible for the reduced number. Nevertheless, in general terms and following the global tendency toward an increase in the population of foreigners, the number for Mexico City by the mid-1960s appeared to come close to 70,000.[4] Those conducting censuses restricted themselves to a particular definition of "foreigner" throughout those years. This definition could pertain to someone who, while living in Mexico, had not finished the cumbersome procedure for becoming a naturalized citizen as well as those who did not have any intention of doing so and simply maintained their original citizenship. Another possible definition for "foreigner" that is a bit broader might correspond to all those who—within or outside the country— did not accept or simply rejected the "essence" of what is "Mexican."

Nationalist zeal was particularly aggressive against some foreigners—primarily those from Spain, the United States, and China—during the revolutionary period from 1910 to 1920.[5] The situation did not improve significantly between 1920 and 1940. Violent actions against Chinese and Spanish—in the latter case, especially those belonging to religious orders—continued during the Calles era (1924–28) and the Cristero Rebellion (1926–29). The offenses committed against foreigners from the United States and Britain during the Cardenist presidential term (1934–40) indicated that radical nationalism was still alive and well.[6] The expressions of xenophobia tended to diminish as the 1940s neared. The period just before the Second World War and during the War itself brought a substantial migration of "foreigners" to Mexico. Their presence and a certain conciliatory interest within Mexican society—apparently in response to a call for "national unity"—served to ease anti-foreign attitudes somewhat.[7]

Among the city's "new" non-Mexican inhabitants, there were many for whom becoming Mexican was the only option for their immediate safety. The refugees from the Spanish Civil War who arrived in the city in the late 1930s and early 1940s offer one example. The exact number of Spanish who were *trasterrados* is not known, but their numbers oscillated between 8,000 and 12,000. Contrary to what is believed, it was actually a minority who found asylum in the universities or scientific and humanist centers. In reality the intellectuals were few in comparison to the workers and technicians, housewives, children and young people. Nevertheless, the intellectuals were so important that from the 1940s to the 1960s a number of generations of Mexicans were influenced by physicians, philosophers, chemists, artists, writers, physicists, journalists, engineers—the list goes on—who were Spanish refugees and who made Mexico the country where they went about their everyday activities. For some of them, life became filled with nostalgia, and fixed on returning home, while others attempted to develop an idea of what it meant to "be" Mexican. Some of them managed to understand and to "court" their new environment in such a way that they contributed a great deal to identifying and developing an appreciation for this "Mexicanness." Some examples were Max Aub, José Moreno Villa and José Gaos, to mention only three particularly important figures in the area of the humanities. There were others of course who became obsessed with the defects they found in their new place of residence, and who jumped at the first opportunity to leave.[8]

II

By the period 1940 to 1968, other inhabitants of the city—children and grandchildren of those who emigrated to Mexico at the end of the previous or beginning of the current century—were making their way through city streets and houses with a certain "foreign-ness" that had the potential to give them a stamp of distinction that would set them apart from Mexicans. Because of the strange fascination that locals had for names of a French, Italian, German or English origin, these members of society were actually given a privileged position. And this was even more true when the names had an element that suggested nobility, such as the famous "von" in the Von Wuthenau's or the Von Merck's. In a novel *Casi el paraíso*, published in 1956, Luis Spota narrates the story of an Italian imposter who passes for a member of the nobility in order to conquer fame and money in the midst of Mexico's corrupt post-Revolution political class. The author describes a night when the imposter attends a fiesta in the home of a "descendent of the Revolution:"

"…When Alonso Rondia drew back the great door that opened up to the vast marble-floored hall, two hundred pairs of eyes fixed their gaze on him and the Prince, and in a moment a hundred mouths fell silent.

My dear friends, Rondia declared, after clearing his throat. It's an extraordinary honor for me to welcome this night, in my humble home, a very dear friend of mine: Prince Ugo Conti, of Italy, and he turned to "his Highness." And, most honorable Sir, may you know that on this night the people of Mexico place their hearts at your feet…

…Someone started to applaud as if it were the climax of a scene in a theatrical production…".[9]

And so it seemed that the wealthy classes not only viewed favorably what came from abroad, but had a particular eagerness to take ownership of something that would identify them as "not national." Last names with a "foreign" resonance, specifically the last names that were without Spanish or Indian—concretely, Nahuatl—references, increased notably in the telephone directories of those years. In 1926, for example, the last name Graf appeared only once in the directory, but by 1946 it appeared 7 times, and by 1966 there were 14 people with this last name listed in the telephone book. A similar proportion followed the Slims, Reynauds, Smiths and Wongs. The Monroys, on the other hand, increased disproportionately: from 8 times in 1926, to 33 times in 1946 and 159 times by 1966.[10]

Just as the Indian neighborhoods and the areas under Spanish domain lent a certain appearance to the colonial city, we find that during the period of the 20th century reviewed in this chapter, the immigrant neighborhoods had an impact on the nature of various contexts in the metropolitan area. While it is true that the so-called "foreigners" managed to blend in when they found themselves in a diversity of contexts in the city during the first half of the century, it is also true that they did not fail to build their own districts or "neighborhoods." The original inhabitants with whom they coexisted in the Valley of Mexico gradually identified the rather well-defined physical and spiritual locations where they established themselves. For example, the Chinese settled near the streets of Dolores and Artículo 123 in the city's center; and the Jews congregated in areas near the city's main plaza, then in the Condesa neighborhood and finally—after prosperity had smiled upon them—in the exclusive Tecamachalco area. The latter even came to be known popularly as the "Tecamachalsky." The Japanese populated part of the extreme southwest of the city, from Las Aguilas to the highland valleys of Contreras.

The Germans initially took a liking to Tacubaya and eventually the tranquil areas of San Ángel and Guadalupe Inn; although some preferred the northern part of the city and the area bordering the state of Mexico. The wealthiest, whether Chinese, Jewish, Japanese, German, British, French, from the US, etc., did not hesitate to live next door to those who imposed the aristocratic lifestyle in the city's extremes: in the far south, around the Jardines del Pedregal, or on the northern outskirts at the La Hacienda Golf Club.[11]

Other wealthy foreigners, primarily French, British and of US origin, took up residence in the modern Polanco neighborhood and also around the old "Chapultepec Heights" area toward the western part of the city, currently known as Las Lomas. Some Lebanese who came into wealth also established themselves there, and managed to mix with the city's "men of wealth and lineage." All of this contributed to an increasing concentration of power and the highest-level decision-making in Mexico City with respect to the rest of the country. The last names prompting the most spectacular envy in social, economic, political and cultural circles during the 1940s and 1950s were clearly "foreign." Nevertheless, some of the lineages boasted by the "locals" managed to stay in the running. In the social pages of the *Excelsior*, *El Universal*, *El Heraldo de México* and *La Prensa* newspapers last names like Trouyet, Buchanan, O'Farril, Lenz and Jenkins competed with Alemán, Ruiz Galindo, Iturbide, Garza Sada, García Balzeca, López Moctezuma and Azcárraga Vidaurreta. And it was not uncommon to find combinations, as in the attendance list for a Christmas posada in 1949 at the Jockey Club and and in the *Registro de los Trescientos* (*The Register of the 300*—the social registry), where the Dondé-Escalante, García-Schondube, Grosbois-Cantón and Toledo-Stransky families were represented.[12]

Wealthy neighborhoods and "modern" styled homes were the natural scenes for the meeting of rich locals and foreigners. Along avenues like Alvaro Obregón, Insurgentes, and Reforma Centro, Presidente Mazaryk, Mariano Escobedo and Chapultepec, one could see Packards, Chevrolets, Fords, Opels, Volkswagens and Renaults driven by *juniors* and young women going from one café to another, one movie theater to another, from a house to an apartment. The route leaving the city's main plaza, turning onto México-Coyoacán Avenue, continuing along Universidad Avenue and ending up in San Ángel or San Jerónimo was the one taken by the most important politicians in the 1960s. In the north, Satélite City had become part of the capital city. An enormous spectrum of Mexicans who had recently joined the ranks of the middle class and who were *provincianos* or *fuereños*, meaning they were originally from outside Mexico City, established themselves in the residential areas that were expanding the urban sprawl to the point of taking over part of the state of Mexico. Expelled from rural Mexico—that seemed unable to withstand the constant crisis and neglect—and attracted to the city by the need for cheap labor prompted by industrialization processes, a large number of low-income families made the capital city their new home. To the north, to the south, to the east and to the west, the city was expanding as never before. During this long period, from 1940 to 1968, it seemed that fewer locals were walking the streets than first or second-generation *provincianos*. Centers or associations that were named according to the outside-Mexico-City origin of their members proliferated, especially once their members had managed to achieve a certain level of economic prosperity. Casino Veracruzano, La Residencia de los Jaliscienses en México, Asociación Civil Yucatánense and Centro Mexico-Oaxaqueño were four classic examples of organizations formed to bring together *provincianos* newly residing in the capital city.[13]

From the mid-1930s on, but especially during the 1940s and 1950s, the favorable areas for establishing large, medium and small-sized industrial establishments increasingly tended toward the northern and northwestern parts of the city. And next to them, the expansions of Satélite City, Hacienda de Echegaray and the new San Mateo neighborhood became the habitats for some particular professionals and government workers with a certain degree of employment security, small-scale business owners and buyers and sellers who enjoyed some benefits, salespeople in the services sector and budding politicians. Members of the social groups who "moved up the ladder" as a result of the so-called "Mexican miracle" managed to become home and car owners through a joint effort—shared without any real consciousness—involving the rest of the population. This "miracle" increasingly benefited newly-established politician-businessmen, primarily members of the club referred to as "Ali Baba and the Forty Thieves." This was the nickname popularly given to President Miguel Alemán and his closest collaborators. Among the many other businesses operated by these politician-businessmen was the task of "urban housing development."[14] Old landowners from the Porfirist era had attempted to save their properties from revolutionary agrarian land distribution by "reinventing" urbanization companies. This form of housing development led to some "more respectable" neighborhoods, and it was also the origin of some "second-rate" neighborhoods in the city. Opening up their housing supply to a rising middle-class market, the housing developers linked to Aléman launched into the northern, western and southern parts of the city. With the passing of an overlapping generation of old and young "businessmen" with strong political ties, the southern rocky part of the city was conquered, to establish the new path toward money there. And arriving there—with all its foreign and mixed last names—was the complex "Mexican" aristocracy that continued to be intertwined with personalities that were clearly of foreign origin, like King Carol and Count von Hartenberg. Also belonging to the aristocracy were individuals like Bruno Pagliai, Axel Wenner-Green and William Jenkins—all three of whom benefited from alliances with Avila Camacho and Alemán-linked politicians.[15]

III

Many immigrants, on the other hand, arrived in Mexico City and found that they could survive only if they sold their labor. Between the 1920s and 1930s, in the factories and stores of their fellow countrymen who had fared well, the descendants of Chinese, Hungarians, Germans, Italians, Polish, Japanese, French, Spanish, and Central and South Americans worked as unskilled or skilled workers, carrying loads or tending stores. They labored next to each other on production lines and sat next to each other at assemblies of labor unions that increasingly allowed themselves to be swayed toward government control and policies. Nevertheless, by the 1940s and 1950s, a significant number of former workers had established their own businesses. The new establishments had names like the "La Francesa" laundrymat, "La Naval" groceries, "Matsumoto" florist, "Ciandoni" ice cream, "La Vienesa" pastry shop, "Zaga" shirt shop and "Badú" furniture.[16] Other "foreigners" were involved in building the skills and promoting the talent of city residents, without receiving great titles or explicit recognition. In schools and both public and private universities, it was common to find teachers and instructors whose "foreignness" could not be concealed. At the Colegio Alemán, for example, Professor Peter Brechtel alternated with Herr Friedrich Erhardt, and Dr. Hermann Fritz with Tante Gisela von Wobeser. And at Colegio de México, professors like Claude

Bataillon, Sergio A. Ghigliazza, Harri Meier, Kazuya Sakai, Clyde Browning and Gustav Ranis were well known among the students of the 1960s.[17]

Something else happened in the world of entertainment, where a reference to something far-away or "exotic" could serve as a hook to attract consumers. Some examples were magicians Fu Man Chu and Chen-Kai, the dancing "Dolly" Sisters and popular singer Negrito "Chevalier." In the area of popular music, the presence of foreigners unquestionably enriched the variety of genres prevailing in night clubs, radio, cinema and television. The Everett Hoaghland orchestra gave an impulse to the music played at tea dances. Rafael Hernández, Consejo Valiente alias "Acerina" and Dámaso Pérez Prado—all from the Caribbean—radically changed dancing habits, by promoting *congas*, *danzones* and *mambos*. South American singers Julio Jaramillo and Olimpo Cárdenas were among the most popular singers among the urban middle classes in the 1950s. And, Spanish singers like Marisol and Rocío Durcal became favorites among the youth in the 1960s.[18] All of these entertainers made Mexico City not only a stopping point, but their temporary residence, and in some cases their home. It was also not unusual to find a certain *mestizaje* in entertainment circles. Classical examples of artistic fusion between "foreign" and national were the highly popular comic duo "Manolín and Shilinsky" and the famous association between Eydie Gormé and Los Panchos.

Talented individuals in artist circles included those whose last names obviously identified their origin beyond Mexico's borders. Seki Sano, O'Higgins, Carrington, Varó, Goeritz, Dondé, Souto, Waldeen, Laville, Gironella, Nichizawa and many, many others too numerous to mention, participated in artistic activity in Mexico City. They brought a cosmopolitan nuance that transcended the initial nationalism of muralists and opened up new paths in this world considered by José Luis Cuevas to be closed off by a "nopal curtain." In the world of cinema important figures like Silvana Pampanini, Christianne Martell, Clifford Carr and Alex Phillips, Jorge Stahl, Albert Zugsmith and Eva Norvind, to mention only some names, were actively involved in technical and "artistic" advances. Luis Buñuel is especially worth mentioning in this context. *Los Olvidados* (1950), in which he gave his version of certain problems among Mexico City youth, became a classic in the history of cinema, even though many Mexicans at that time were not thrilled with a "foreigner" showing them the miseries of their own urban society.[19]

Nevertheless, and this was certainly not exclusive to Mexican society, the presence of something foreign or non-Mexican produced, in some sectors, not rejection but on the contrary, enormous fascination. This was the case in many contexts, for example in private practices like medicine or financial advice. Going to see Dr. Stern was rated much higher—in terms of the consumer's "social prestige"—than letting Dr. Pérez prescribe your medicine. Receiving financial advice from Brockmann & Shultz was rated much higher than going to González and Associates. The same was true in banks, hotels, stores and name brands. The Bank of London and Mexico, Hilton and Ritz hotels, Sears-Roebuck and the American Bookstore, with their "foreignized" names, all seemed to come with a guaranteed seal of quality.

The migration flow to the city during those years favored the continuation of old institutions as well as the creation of new cultural and commercial entities with foreign last names. Schools, hospitals, chambers of commerce, churches, boarding schools and retirement centers, sports clubs, and academies for dance, art, literary studies and even "musical appreciation" all had some French, US, British, Ashkenazi, Lebanese, German, Japanese or Chinese adjective for a second name. So, members of immigrant groups mixed with "nationals" when receiving the services of, for example, Hospital Inglés,

Asilo Mundet, Mexico City Center, Tarbut or Club Japonés. The same happened with products from Monsanto & Co., Beick-Felix, the Wagon Lits Cook travel agency, Wong's chocolates, Ericsson telephones and even oil derivatives from Pennsylvania Oil Co.

During the Second World War, some institutions of this type, as well as certain businesses, stores, and properties, suffered intervention by Mexican authorities. Germans, Italians and Japanese living in Mexico found their aspirations to achieve, maintain or consolidate their dreams of economic success temporarily limited. While only a few were seriously impacted by the emergency situation provoked by the war, their status as "foreign enemies" certainly produced discomfort and headaches, since the situation was particularly suitable for the expression of some xenophobic tendencies among "authentic" Mexicans. Casa Boker, located in the city's center, for example, was an important hardware and machinery store with a German owner, and was attacked on numerous occasions. Anti-fascist protest demonstrations constantly left its storefront painted with slogans like "Nazis out of Mexico."[20]

In general terms, these citizens of countries contrary to the well-being promised by Pan-Americanism and national unity, were allowed to continue their activities in a basically normal manner once the war was over. A couple of them were even benefited, finding their business or property much healthier than when it was confiscated by the Mexican government.[21]

During the Cold War years, the coexistence between "foreigners" and Mexicans followed paths more oriented toward the assimilation of cosmopolitanism than toward the nationalisms characteristic of the revolutionary period. Customs and traditions, "ways of being" and particular values were not forgotten, but there was widespread participation in the process of secularization and ongoing *mestizaje*. With the passing of time, the model based on the "American way of life" gradually covered a range of cultural contexts, the amplitude of which may be difficult to calculate but not difficult to perceive. This model could be seen in both semi-public spaces like the "Lobby Nightclub" and even household bastions where the "Presto" cooking pot distributed by H. Steele y Cía, S.A. and a "Hoover" washing machine were becoming increasingly indispensable. The presence of what was viewed as characteristic of the United States seemed to have more influence in "Mexican culture" than the other tendencies.

IV

Of all the "foreign" tendencies, the *gringo* was the one that became the most strongly consolidated toward the end of the 1960s. A number of factors worked particularly in its favor, the most important of which was economic penetration. For example, of the slightly more than 2,000 companies that established themselves in Mexico City in 1960, nearly 65% had some kind of link to US capital or products.[22]

Mass media were not left behind in this regard. On radio and in film and television, especially the latter two, the images and sounds, trends and customs, and in general everything characterizing the "American way of life" was dominating the scene. By 1960 there were 55 radio stations in Mexico City, and at least 50% of them were dedicated to transmitting US music for young people and adults.[23] In 1965 the radio station at 6.20 on the AM dial broadcast, for example, what was called "music that's here to stay," including basically the melodies sung by Doris Day, Connie Francis, Tony Bennet and Perry Como, among others, accompanied by piano players Ferrante & Teicher or the Ray Conniff, Nelson Riddle or Percy Faith orchestras.

Rock 'n' roll had been competing for some time with tropical and *ranchera* music in the world of music for young people. Groups like Los Hooligans and Los Rocking Devils clearly demonstrated their fondness for US music, translating songs like "Jailhouse rock" and "My boy Lollypop" into Spanish ("*El rock de la cárcel*" and "*Mi novio eskimal*"). The public had such a weakness for rock 'n' roll that one of its initiators, Bill Haley, who wrote "Rock around the clock," spent long periods of time in Mexico City, performing in night clubs and dance halls—even long after dancing to this music was no longer in style.[24] In terms of cinema, a single piece of information tells the story: in 1959 a total of 211 US films hit the movie theaters, in comparison to 89 Mexican films for that year.[25] Stars in US films in the 1960s like Rock Hudson, Jane Mansfield and Bobby Darin displaced classic European figures like Jean Gabin, Simone Signoret and Yves Montand.

In the case of television, the penetration by images and trends from the United States was much more intense. Competition by European influence was basically non-existent. By the mid-1960s US television series like "I Love Lucy," "Mr. Ed," "Lassie," "Combat!" "Hopalong Cassidy," "Bat Masterson," "FBI," "Highway Patrol," "Dr. Kildare" and many others invaded the television channels. These TV series could be watched during prime time and were accompanied by countless commercials advertising products like Acros stoves, Osterizer blenders and Frigidaire refrigerators.

With all of this, the society inhabiting Mexico City in the 1950s and throughout most of the 1960s gradually assimilated admiration for the "American way" into their everyday life. A nationalist spirit was seemingly reserved for only specific occasions, and was generally expressed through stereotypical images of what had become established at that time as "typical Mexican." When it came to feeling "Mexican," the most conspicuous members of this society organized fiestas decorated with banners of *papel picado* (colored tissue paper cut-outs in intricate designs), served *ponche* (natural fruit punch served warm) in *jarritos* (traditional ceramic mugs), covered tables with *sarapes*, and wore the obligatory *rebozo* (typical shawl) or immense *charro*-type *sombrero*, while shouting their long, emotion-filled "aaaajúas" to the sounds of some mariachi band contracted in the Garibaldi plaza.

<div align="center">V</div>

During the first half of the 1940s the notion of National Unity became an obsession for the political class, starting with then-president General Manuel Avila Camacho. With the pretext of the emergency situation provoked by the Second World War, the government promoted a so-called "end to revolutionary radicalism."[26] Not only was the emergency situation used as a justification for certain measures contrary to the nationalist revolutionary project, "national unity" was implemented in an attempt to minimize the deep divisions in society, inherited from the economic and political crisis suffered during the final years of the General Lázaro Cárdenas regime (1938–40).[27]

In addition, from the 1940s on, governments were characterized by a strong alliance established with the United States and the gradual dismantling of the most radical sectors in government bureaucracy, as well as the imposition of strict control over the workers' movement and a tacit end to agrarian reform. During the second half of that decade, power was handed over to a generation of "civilians," mostly with university degrees, and headed by Miguel Alemán, named the "cub of the Revolution." He had promised to take the country along a path filled with hope, but numerous errors were made and the well-being for the majority offered by the government took so long to arrive that, for certain sectors, it was nothing more than political discourse. What was particularly notable

was that a handful managed to increase their wealth, and consequently the next president, Adolfo Ruiz Cortines, appealed to a campaign, beginning in 1952, for moralizing the use of power. At the end of the 1950s a charismatic individual, Adolfo López Mateos, assumed the presidency and focused on promoting the country internationally in the midst of the conflictive Cold War setting. Nevertheless, developmentalist optimism collapsed during the second half of the 1960s, when the administration at that time, headed by Gustavo Díaz Ordaz, responded with violence to the demands made by urban middle-class sectors. The way in which the Díaz Ordaz government responded first of all to the resident doctors movement in 1966, and then to the student movement in 1968, demonstrated that Mexico's political system had reached a high level of self-complacency and authoritarianism, and was incapable of sustaining a dialogue with the emerging sectors. The massacre on October 2, 1968 at the Plaza de las Tres Culturas in Tlatelolco was a clear sign of the lack of political sensitivity on the part of authorities, who were accustomed to constant praise and relative economic stability. For most political analysts, 1968 marked the end of an entire era of economic improvement known internationally as the "Mexican miracle."[28]

The political elites had attempted, for some 25 years, to prop themselves up through a certain guarantee of tranquility combined with slow economic growth, but this scenario was not exempt from conflicts. Between 1940 and 1968, railroad workers, miners, electrical workers, teachers, students, doctors and opposition groups disrupted the city's streets in response to the political and economic restrictions imposed by an increasingly closed, rigid system. This unrest was not provoked by Communists, Falangists or Nazis, as in much of the 1930s and the early 1940s. Rather, these were the voices of citizens, members of the working and middle classes, who were trying to make their voices heard by the members of the political elite, increasingly distance from popular interests.[29]

The demands made by these sectors were constantly identified with adjectives like "anti-Mexican," "foreignized" and even "exotic." Authorities, making use of so-called "Mexicanness" for their own purposes, developed a "doctrine" that was soon included in the central theses of the party in power, the PRI. In addition to superficially reaffirming some of the nationalist postulates of the 1910–20 Revolution, it categorically rejected "ideas alien to our reality." This discourse used by those in power was basically aimed at holding up "Mexicanness" against Communism and the so-called "agents of social dissolution." This discourse made use of the glorified traditionalist values that were so important to the middle classes and the elite—tolerated as long as their obedience to the government remained intact. In 1947, for example, the PRI published its action plan, the postulates of which specified "prompting confidence in the government, initiating a campaign in favor of respect for and obedience with the law, and affirming the meaning of 'Mexicanness' in people's consciousness." And it concluded this way: "In response to theories imported from foreign countries, we emphatically affirm the creed of 'Mexicanness,' since far from abiding by other dictates, we believe in Mexico…."[30] The declarations by the PRI appeared to have been stolen in the crudest way from the Creed that was published by "El Vate" Ricardo López Mendez in 1941, and began with:

> "…Mexico, I believe in you,
> like a vertex of an oath.
> You smell of tragedy, my land,
> and nevertheless, you laugh too much,
> perhaps because you know that the laughter
> is the wrapping of a quiet pain…."[31]

VI

For the inhabitants of Mexico City, "Mexicanness" was also the combination of other elements not related to struggles for power, but rather linked to the diverse tendencies and expressions of popular culture.

During those years a number of stereotyped Mexican characteristics were becoming consolidated and multiplied—especially in communication media concentrated primarily in the capital city. The press, theater, radio, cinema and eventually television insisted on glorifying everything considered to be "typically" Mexican, with the aim of laying claim to a very simplistic, artificial nationalist image. This was related to an interest in establishing characteristics and elements of identity for nationals and foreigners, in a world impelled by increasing internationalization. The simplifications and diminished versions of these common points of identity became items for the most widespread consumption, achieving great popular consensus and the international projection of a specific image. This is how the symbolic manufacturing of what is "typically Mexican" was accomplished: portraits, clothes, particular ways of talking, musical genres, dances, gastronomic events and other representations and activities were produced and consolidated for the country's tourists and inhabitants alike that would serve to identify and differentiate Mexico from other Spanish-speaking countries.

Inherited from that introspective, nationalist current of the Revolution and revitalized during the 1920s and 1930s—in which diverse "foreign" interpretations were much involved—the "Mexican" stereotypes were consolidated in the 1940s. Many elements of these stereotypes had characteristics that had already been well-tested in the process of mass media construction.[32] Nevertheless, these stereotypes also held a privileged place in the spheres of humanistic reflection. Literary, political and philosophical figures as important as Martín Luis Guzmán, José Vasconcelos, Antonio Caso, Ramón López Velarde and José Juan Tablada concerned themselves in the 1920s with defining what was "Mexican." The work of painters like Diego Rivera, José Clemente Orozco, David Alfaro Siqueiros, Fermín Revueltas, Adolfo Best Maugard and Manuel Fernández Ledesma, to mention only a few examples, also responded to this concern. Intense controversies and prolific searching in this regard characterized both art and literature. In the 1930s this matter was a subject of concern for philosopher Samuel Ramos, who after writing his well-known study *Profile of Man and Culture in Mexico*, passed it on to a group of thinkers known as "Hiparión." Created in the second half of the 1940s, this group was led by Leopoldo Zea, and included members such as Luis Villoro, Jorge Portilla and Ricardo Guerra. Zea even published a collection of books under the generic name of "México y lo mexicano" ("Mexico and 'Mexican'"). The philosopher Emilio Uranga stated at that time: "Never as in those years (1945–53) did philosophers enjoy the privilege of their topic being paid so much attention by so many people."[33] But the topic seemed to soon run its course, leaving only a few important works behind. Perhaps the most well known is *The Labyrinth of Solitude* by Octavio Paz, which because of its elegance and to a significant extent its questioned depth, seemed to leave the vein of works on "Mexicanness" fairly well covered.

In popular culture, images of what was considered to be "typically Mexican" continued to be a focus until well into the 1960s, and in some cases, to date. These images are "Mexican representations" of stereotypes known as the *charro*, *china poblana*, *indito* (diminutive form of Indian), *revolucionario*, *soldadera* (a woman who accompanied soldiers during the Revolution) and *peladito*. All of these representations became obligatory

references for national identity. With their particular way of dressing and speaking and their emotional characteristics, it became increasingly easy to identify them. At the regional level, there were other stereotypes, just as "Mexican" as those mentioned above, including the *tehuana*, intended to express the beauty and attire of the women of the Tehuantepec Isthmus; *jarocho* to express a jovial, talkative personality from the state of Veracruz; *huasteco* to identify the jacket-wearing inhabitants of the Huasteca region; *norteño* refering to all the hat-wearing residents from the northern states of Nuevo Leon, Coahuila, Chihuahua, Sonora, Sinaloa and Durango; and *boschito*, which includes the stereotypical *chaparritos* (of low stature) and *cabezones* (with large heads) born in the Yucatán. Each regional stereotype represented the "typical" inhabitants of different regions of the country, characterized by particular attire, dances, music, food, accents used when speaking—in short, all types of customs and traditions that differentiated them, one from another.

The "national folklore," to which all these "typical" inhabitants belonged, was made up of what the country's cultural authorities and communication media believed was a set of values representing an entire country. Through musical styles like the *mariachi* and *son jarocho*, the attire of the *charro* and *china poblana*, attitudes like the bigheadedness of *ranchero*-style *machismo* or the humility and mistrustful obedience of the *indito* were firmly established over time as the "inventions" of a country and its inhabitants.

It was precisely in Mexico City—the national center of power and culture—where these "classic Mexican images" were affirmed or in some cases invented. These images quickly became favored items for consumption and export. The so-called "folkloric dances" were included as obligatory additions to the major official festive events and most school ceremonies. The well-known "Ballet Folclórico de Amalia Hernández" has become a kind of national "cultural ambassador" since its founding in 1952. Since that time it has been presented at least once, often twice, every week in the Fine Arts Palace, to entertain tourists and Mexicans interested in sharing these "moments of typical Mexicanness." This has, of course, always been solidly supported by the nation's largest television consortium, and perhaps the largest in the Spanish-speaking world—which broadcast *Doña* Amalia's dances all throughout the "Función de Gala" programs, so highly acclaimed by national and international audiences. Linked to the Department of Tourism, the members of this "Folkloric Dance" group had absolutely no hesitation declaring themselves to be the "typical Mexican representatives most highly accepted world-wide…."[34]

VII

From the 1920s on, the place where "national folkloric values" earned approval was Mexico City. The *indio mexicano* was more an imaginary, urban version of the native inhabitants of the Valley of Mexico and its surrounding areas than a portrait of real indigenous people. The Mexico City theater and "artistic" elements created the characteristic manner of speaking and the typical attire in coarse white cotton cloth, with sandals and a sombrero. The first *mariachis* from the state of Jalisco arrived in Mexico City and because of various circumstances quickly became "Mexico's musical symbol." Both the emerging radio industry and musical events in the capital city's theaters became much involved in the popularization of *mariachi* music. During the second half of the 1920s various groups of musicians from Jalisco arrived in the city and achieved success through

musical presentations and radio broadcasts. Soon the major newspapers were writing about this music, and a couple of *mariachi* groups—one especially worth noting was Cirilo Marmolejo—decided not to return to their place of origin, Jalisco, and instead establish their center of activities in the capital city. Their style was widely accepted because of the versatility demonstrated by this string ensemble—with the capacity to mobilize rapidly and accompany any musical genre. Later, in response to requirements imposed by radio and stage performances, trumpets were added to the instrumentation to add a certain resonance to the delicate tones of the harp, the latter of which was eventually emphasized less when these ensembles were being formed.[35]

From the 1930s on, every fiesta had a *mariachi* band. *Mariachis* gradually began to take over images and places. Dressed in the old style used by the Miguel Lerdo de Tejada Typical Orchestra, which was *charro* (or similar to a rural cavalry uniform), *mariachi* bands initially concentrated around radio stations and cantinas. Then they took over the Santa Catarina Plaza and Garibaldi Plaza. Their "typical Mexican" music went through many modifications. From the original small ensemble that played *sones abajeños*, to the Mariachi Orchestra led by Rubén Fuentes, all of them want to identify themselves with the "authentic" sound of violins, trumpets, *viheulas and guitarrones* emanating from a group of musicians wearing sombreros and dressed as *charros*.

Something similar happened with the attire and the attitudes that would gradually define the "Mexican stereotype." The *charros* and *chinas poblanas*—dancing the *jarabe tapatío*—were viewed as the nation's "typical representatives" for both nationals and foreign visitors. The origin of the *charro* lies in a combination of muleteer and rancher, a man who has lived alongside the cattle he tends since the end of the 18th century and throughout the 19th century in western Mexico. The *charro* was and continues to be distinguished by his immense sombrero, tailored pants with silver buttons down the sides and embroidered vest, together with his sarape, spurs, lasso and of course, his horse. The *charro* presumably originated in the Bajio region, encompassing the country's central and western states, and this tradition gradually spread to the rest of the country.[36]

China Poblana comes from the state of Puebla in the eastern part of the country, as the name indicates—and was and is the *charro's* "natural" companion. *China* was the generic name used by inhabitants and writers to refer to independent *mestizo* women in the Valley of Mexico during the 19th century. Others claim that the original *China Poblana* was Catarina de San Juan, a woman from the Orient—a place called Conchinchina—who lived her final days in Puebla during the colonial period after serving as a slave to a Spanish captain. But *china poblana* identifies a certain type of attire that was reinvented at the end of the 19th and the beginning of the 20th century. It consists of a white, short-sleeved blouse with a rounded neckline, combined with a usually red skirt embroidered with many chaquira beads and sequins. A *china poblana* usually wears her hair in braids, always has her shawl, and also wears brilliant pendant earings and pearled necklaces.[37]

The third element in this typical portrait is the *jarabe*. It became a choreographed dance for couples who move around each other without touching, and has been a great favorite of Mexicans since the early 19th century. *Don* Vicente T. Mendoza says: "…its name and nature is associated with syrup, it may be derived from the Arabian word *xarabe* and may be associated with the *charape* in the state of Michoacan, a drink made with *piloncillo* (a brown sugar that comes in cone-shaped blocks)…."[38] The grandparents of this dance were other dances known as *pan de jarabe* and *jarabe gatuno*, which troubled

the Holy Office of the Inquisition so much that they were frequently mentioned in reports from the late 18th century in coastal, central and western New Spain. This same dance was mentioned in the chronicles of theatrical events in the *Coliseo*, and especially in 18th century celebrations in fairs and slums. By the early decades of the 19th century, *jarabe* had become a choreographed musical piece so popular it became a positive attribute of the *mestizo* and *criollo* identities. Its popularity continued to increase to the extent that by mid-century the list of "National Songs" included a number of *jarabes* identified by adjectives like "*abajeño* (from the lowlands)," "crazy," "*tapatío* (from Guadalajara)," "*pateño*," "*ranchero*," "Mixtec," "favorite," "common," etc. Of all these versions, the *jarabe tapatío* would become the "typical" dance, and was even referred to as a "national dance," especially after it was popularized by Russian dancer Ana Pavlova together with some Mexican artists in 1919.[39]

Due to the insistence of revolutionary educational authorities, but especially due to cinema, radio, popular theater and the press, Mexicans were increasingly identified with the stereotyped portrait of a *charro* and *china* dancing the *jarabe tapatío*. This stereotype was firmly established as a result of a strange confabulation of nationalisms that combined the "Mexicanist" concerns of revolutionary administrations with the nostalgic memories of the countryside remaining with the now not-so-elite groups. In this way, the eagerness to define "Mexico's own" came to be, joining together the west (*charro*) with the east (*china*) in a dance that affirmed the identity as *mestizo*, as opposed to what was "alien" or "unknown." Both the new governments and representatives of the old elite groups, now established in Mexico City, agreed that the depiction of "Mexican par excellence" should be a *charro* with his *china* dancing the *jarabe*. Soon after, around 1932, in the midst of "nationalist campaigns" organized in an attempt to reactivate the domestic market that had diminished in the wake of the 1929 crisis, Mexico City authorities and associations of *charros* agreed that the national sport should be *charrería*, in which the skills of *charros*, horses and bulls are tested in a type of representative re-creation of lassoing and horseshoeing as practiced in the old ranching haciendas. These rodeos, now called *jaripeos*, are typically a combination of bullfighting, horse riding, music and dance.[40] At the conclusion, the *charros* would invariably dance *jarabes* with their *chinas*. This typical portrait marked the end of the fiestas for all the nationalist events from the 1920s until well into the 1960s, and even today a *jarabe* is the last dance in practically any presentation of folkloric dance.[41]

VIII

Other identities disputed the status of national stereotypes given to *charros* and *chinas*. These were the *tehuana* and *jarocho*. The first, with her white headdress, the velvet splendor of her blouse and skirt, and the rhythm of her walk, initially competed with the *china poblana*, but because the *tehuana* was limited to such a very particular region—the Tehuantepec Isthmus—she lost the contest.[42] The *jarocho* also entered the competition and acquired a favorable position in the second half of the 1940s, since President Alemán and a good number of his collaborators were from the state of Veracruz. *Sones jarochos* like "La Bamba" and "El Siquisiri" could be heard throughout Mexico City, and the stereotyped *jarocho*, dressed in white, with a red scarf and a sombrero with four *pedradas* was an obligatory element in official ceremonies, and certainly in restaurants serving Veracruz food. Its popularity increased to such an extent that during the 1950s nightclubs like "Sansoucy" and "El Patio" included, among its favorite numbers, the presentation

of *jarocho* groups like "Medellín," "Tierra Blanca" or "Andrés Huesca y sus costeños." These groups included the famous *fandango* dance, also based on an eye-catching and decidedly stereotyped choreography for couples who move around each other without touching.[43]

But as written in the illustrated multinational book in the 1940s entitled *El Mundo Pintoresco*: "…We found many multicolored typical costumes in this country, but none more famous than those worn by *charros* and *china poblanas*, which offer a cheerful, vivacious note to any and all popular fiestas…."[44] This was confirmed more than enough times in numerous films of that time. From the super-famous *Allá en el Rancho Grande* (l936) directed by Fernando de Fuentes, who won Mexico's first international award for cinematography in Venice—to the reminiscences of *El charro negro vs. la banda de los Cuervo* (l962) directed by Arturo Martínez, the typical portrait of a *charro* and his *china* was an obligatory reference for affirming "…the true Mexico…."

These films owed a great deal to popular theater from the 1920s and 1930s. Given the nickname "magazine theater," music was combined with dramatizations filled with local references and symbols in defense of the "typical", or what from that time on was coined "Mexican Curious," including regional dances, folk art and attire.[45]

Ranchera songs, clearly alluding to this spirited rural society, remained on the radio airwaves in the city. XEW—the voice of Latin America from Mexico—broadcasting from the so-called "Radiópolis" located near the corner of Chapultepec and Balderas, aired a program called *Amanecer Ranchero* in its early morning daily programming. This program became a kind of "radio institution" in Mexico City in those post-war years, and was transmitted to the rest of the country in an attempt to acknowledge the elements associated with rural genres considered to be central factors in music identity. The music heard on that program was "real Mexican music" generally accompanied by *mariachis* and featuring the music idols of that time: Jorge Negrete, Lucha Reyes, Pedro Infante, Javier Solís, Lola Beltrán and many others. Despite the onslaught of Caribbean music and US-influenced styles that had an enormous influence on the development of popular music, there was always a special place for the vernacular songs of José Alfredo Jiménez, Lucha Reyes or Cuco Sánchez.

Of course, not everything *ranchero* was *charro*, and not everything *charro* was *ranchero*. But the dividing line between these two categories diminished when the objective was to express what is "Mexican." A classic musical image, for example, was a *charro* accompanied by his *mariachis* and singing a romantic song to a *china* who had stepped out on a balcony—with everything given a *ranchero* quality, or if you prefer, a country atmosphere. This scene became "classic" as a result of Jesús Helguera's calendars, which from the 1940s decorated the walls of butcher shops, general stores, neighborhood corner stores, humble living rooms and middle-class kitchens.[46]

Various *ranchero* or *charro* characters appeared in the comic strips and cartoons in the newspapers. Their daily presence gave an unmistakable sign of the way urban writers, illustrators and readers associated what was unique about Mexico with rural—or *ranchero*—life. Characters like "Mamerto," "El Alacrán" or "El Payo" became the contemporary heroes of modern melodrama. All three had in common their *charro*, or at least *ranchero*, attire, and all three were national creations, launched to the "outside world" from Mexico City. It would seem that the "Mexicanness" distributed by a growing urban conglomeration needed a rural reference to establish its identity.[47]

IX

Despite the nostalgia for the countryside, the capital city acquired a certain cosmopolitan quality from 1940 to 1968. A Mexican–US magazine described the city's development in the mid-1940s:

> "…Mexico City progresses daily. Proof of this is the modern Reforma Avenue, where the elegance of chalets and the outlines of immense buildings, the central Paseo boulevard with its leaf-covered trees all come together harmoniously, giving a complete sensation of prosperous serenity…."[48]

Despite this appearance of prosperity, urban life generated another unique stereotype that expressed values linked more to the city's low-income neighborhoods. This was the case of the *peladito*, a magician with words, manifested in the eventually famous Mario Moreno or "Cantinflas." This personality was the classic inhabitant of the poor, marginalized urban world. Poorly dressed, sometimes in rags, he appeared witty and playful on a stage that served equally for making denouncements and for justifying the city's contradictions. This *peladito* was also a hero of the mass media during this entire period. He appeared first in the popular magazine theaters, and then later on radio and in films. He managed to make a great majority of Mexicans, especially from low-income sectors, view him as someone they could relate to. His "Mexicanness" was not called into question since he was Mexico City's very own stereotype. Unlike *charros* and *chinas*, a *peladito* could step into a great number of different contexts, and even demonstrate a certain cosmopolitan air—to the extent that, as the 1960s neared, this popular figure jumped from poor neighborhood *vecindades* to the mansions of the wealthy, from neighborhood *bailongo* dances to nightclubs, and from cinema sets to Social Security hospitals. He even dared to jump from Mexico City to major centers of cinematographic cosmopolitanism and to performing in a movie in 1956 Hollywood entitled *Around the World in 80 Days*, playing the part of "Passepartout" and sharing credits with David Niven and Shirley McLaine. If this was not enough, "Cantinflas" had the leading role in the US-Mexico production of "Pepe" which turned out to be an all-star movie with Maurice Chevalier, Bing Crosby, Jimmy Durante, Frank Sinatra, Kim Novak, Sammy Davis Jr. and Edward G. Robinson. With music by André Previn and directed by George Sydney, the movie featured only a shadow of the original "Cantinflas," converted into a ranch hand and "decidedly a supporter of the American way of life."[49] Still, the "Cantinflas" who acted in those movies and was received by US President John F. Kennedy in the White House as "a representative of the Mexican people" maintained a certain quality of stereotyped "Mexicanness" throughout his international performances and career.

Of course, this was not an exclusive case in national cinema. Other figures like María Félix and Pedro Armendáriz appeared in films outside of Mexico, but clearly, "Cantinflas" was the one most responsible for the projection of a "Mexican stereotype," and as José de la Colina would say, one very much in line with US preferences: picturesque, child-like and attentive, and someone easily kept happy with trinkets. This tendency toward defending cosmopolitanism carried a high price for someone who sought to define his "Mexicanness" in this way. Cantinflas continued to be a hero in certain low and middle-income sectors, but as the 1960s progressed, his pro-yankee stance and his gradual separation from those sectors left a certain undertone of falseness, even corruption that distanced him from being tacitly accepted into the repertoire of "Mexicanness."[50]

Paying a similar price, Mexico City tended to become increasingly cosmopolitan dur-
ing the period from 1940 to 1968, although it clearly maintained a certain quality of
"Mexicanness." Without a doubt, when there was a need for the country's most repre-
sentative symbols, the *charro*, *china* and *mariachis* were generally selected. But the use
of the *peladito* stereotype, as an urban counterpart of that "popular Mexican" notion,
promoted a move away from rural life—left behind as "modern" automobiles were bus-
tling along a series of still poorly paved streets, to reach the Zócalo station on the city's
first Metro line.

X

At the end of the 1940s the enthusiasm on the part of the political elite to become more
cosmopolitan and more modern led journalist Carlos Denegri to comment: "The revo-
lution has gotten off its horse and into a Cadillac." The image was appropriate. Even
though it was still possible to see *charros* riding horses along Paseo de la Reforma well
into the 1960s, there already existed 192,567 automobiles and 7,473 buses in the city
by 1960.

The rhythm at which the city grew was frankly dizzying. In 1960 alone, construction
was completed on 7,774 buildings with more than two floors; 965 periodical publica-
tions were circulating on the streets; and messages from 55 radio stations and 6 televi-
sion channels filled the airwaves. By the end of the Adolfo López Mateos presidential
term, that is, by 1964, the city housed the recently-inaugurated National Museum of
Anthropology which, together with the Museums of Modern Art and Natural History,
adorned the western part of Chapultepec Park. The city also had over 200 movie and
stage theaters, and that year it received nearly 800,000 foreign visitors.[51] Not only that,
but it could be proud of its distinction as the first Latin American city selected as a site
for the Olympics, specifically the XIX Games in 1968. In this way, Mexico City attempted
to demonstrate its cosmopolitan spirit to the entire world.

Several years earlier *National Geographic* had published an in-depth feature on Mexico.
Referring to the capital city, it mentioned the beautiful buildings that had appeared on its
downtown streets after the earthquake of 1957. "But these office buildings need renters,"
it said. "Rent is paid by a long list of prosperous Japanese executives dedicated to buying
cotton, French auto salesmen and Germans involved in the chemical industry.
Internationalism has reached an extreme point in a restaurant where the Cantonese chef
is given the orders by a translator especially hired for this purpose."[52] Next to this cosmo-
politan description, one could admire photographs of the city in which its provincial
character was still clearly evident: the photographer at the Basilica de Guadalupe wearing
his *sarape* and *charro* attire, the corner stand where a woman wrapped in a shawl is selling
garnachas (fried corn tortillas with a variety of toppings), and a *mariachi* band staggering
at the entrance to a cantina. The focus was on a cosmopolitan city that had refused to cast
off all the receding tides of its identity based on both real and invented. rural traditions,
During those years, life in the metropolitan area operated in multiple time frames, moving
down a path filled with many dreams and a reality brimming with stereotypical simplifica-
tions unable to conceal the multiplicity of the "many Mexicos," both authentic and imag-
inary. These "Mexicos" were reduced in official discourse to a single "Mexico" that
brought together in the simplest manner imaginable the commonplace expressions in
López Velarde's "Suave Patria (Sweet Homeland)" and in López Méndez' exaggerated
"Mexico, I believe in you." The reduction was so brutal that in 1969, poet Juan Alfonso

Chavira attempted to sum up such a totality in an utterance of demagogic trivialities expressed in the following lines:

> "God bless you, Mexico, in art,
> in your science, in your techniques
> and also in your aspiration for peace
> that will offer you heavens of love to be shared.
> ¡God bless you, Mexico, and…. amen !"[53]

Notes

1   See Ricardo Pérez Montfort, "La ciudad de México en los noticieros fílmicos de 1940 a 1960," in *Estampas de nacionalismo popular mexicano. Ensayos sobre cultura popular y nacionalismo*, CIESAS, Mexico, 1994, p. 207.

2   *Mexicanos al grito de guerra. Monografía sobre el origen, historia y significado del himno nacional y la bandera mexicana*, Luis Fernández, G., Editor, Mexico, 1952, p. 3.

3   Some ideas and proposals around the sterotyped notion of "Mexicanness" that was sanctioned and disseminated from Mexico City can be found in the paper entitled "Una región inventada desde el centro. La consolidación del cuadro estereotípico nacional 1921–1937," published in Ricardo Pérez Montfort, *Estampas de nacionalismo popular mexicano. Ensayos sobre cultura popular y nacionalismo*, CIESAS, Mexico, 1994, pp. 113–135.

4   Delia Salazar Anaya, *La población extranjera en México (1895–1990). Un recuento con base en los Censos Generales de Población*, INAH, Mexico, 1996, p. 334.

5   See Moisés González Navarro, "Xenofobia y xenofilia en la Revolución Mexicana," in *Historia Mexicana*, XVIII, (April–June 1969), pp. 569–614.

6   See Ricardo Pérez Montfort, *Por la Patria y por la Raza. La derecha secular en el sexenio de Lázaro Cárdenas*, UNAM, Mexico, 1993.

7   See Carlos Monsiváis, "Sociedad y Cultura," in Rafael Loyola (coordinator), *Entre la guerra y la estabilidad política. El México de los 40*, CONACULTA-Grijalbo, Mexico, 1990, pp. 259–280.

8   Many have written about the Spanish migration to Mexico during the 1930s. Only three essential works will be cited here: Patricia W. Fagen, *Trasterrados y ciudadanos*, FCE, Mexico, 1975; Eugenia Meyer (coordinator), *Palabras del exilio. Contribución a la historia de los refugiados españoles en México*, INAH, Mexico, 1980; and José Alameda et al., *El exilio español en México 1939–1982*, Salvat-FCE, Mexico, 1982.

9   Luis Spota, *Casi el paraíso*, FCE Letras Mexicanas No. 29, Mexico, 1956, p. 111.

10 To obtain these data, three Mexico City telephone directories from 1926, 1946 and 1966 were randomly selected and compared.

11 See Gloria González Salazar, *El Distrito Federal: algunos problemas y su planeación*, UNAM, Mexico, 1983.

12 *Excelsior*, December 21, 1949.

13 Mexico City Telephone Directory, 1966.

14 Enrique Krauze, *La presidencia imperial. Ascenso y caída del sistema político mexicano (1940–1996)*, Tusquets publishers, Mexico, 1997, pp. 103–105.

15 See Juan Manuel Fragoso, Elvira Concheiro and Antonio Gutiérrez, *El poder de la gran burguesía*, Cultura Popular publishers, Mexico, 1979.

16 Alfonso Morales (coordinator), *Asamblea de ciudades*. Catálogo de la Exposición en el Palacio de Bellas Artes, CONACULTA, Mexico, 1992.

17 See Clara E. Lida and José Antonio Matesanz, *El Colegio de México: Una hazaña cultural 1940–1962*, El Colegio de México, Mexico, 1990.

18 Yolanda Moreno Rivas, *Historia de la música popular mexicana*, CONACULTA-Alianza Editorial Mexicana, Mexico, 1989.

19 Emilio García Riera, *Historia del cine mexicano*, SEP, Mexico, 1986.

20 See Brígida Von Mentz, et al., *Los empresarios alemanes, el tercer Reich y la oposición de derecha a Cárdenas*, Volumes 1 and 2, CIESAS, Mexico, 1988; Monica A. Rankin, *México, la patria: Propaganda and Production in World War II*, University of Nebraska Press, Lincoln, 2010.

21 Guadalupe Zárate, "¿Qué hacemos con los bienes del enemigo?" in *Historias 33*, Revista de la Dirección de Estudios Históricos del INAH, Mexico, October 1994–March 1995, pp. 91–97.

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32 See Pérez Montfort, *Estampas de nacionalismo*, op cit., pp. 113–179.

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50 José de la Colina, cited in Emilio Garcia Riera, *Historia documental del cine mexicano*, Vol. 7, Era publishers, Mexico, 1975, p. 368.

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Consumption and Material Culture from Pre-Contact through the Porfiriato

STEVEN B. BUNKER AND VÍCTOR M. MACÍAS-GONZÁLEZ[1]

Introduction

The production, sale, acquisition, accumulation, and use of goods and services in any society generates status, a sense of affinity predicated on the use of common objects, and feeds consumer fantasies and anxieties. While societies have at times attempted to impose and limit patterns of consumption, these have just as easily been emulated or copied by the middle and working classes, who created subtle modulations as they adjusted these patterns to suit their needs. Things and how they were consumed reassured consumers, cementing their claims to legitimacy and affinity with others. Yet in the process of circulating among different classes and being deployed for different purposes, goods and services have helped to sustain and disrupt different social, cultural, and political markers, calling into question and eventually rendering moot distinctions that these goods or services were meant to sustain. Mexicans have acquired and used objects and services to differentiate themselves from others, but also to emulate or aspire to others' status or condition. Objects' capacities to prompt, transmit, and generate meaning allowed Mexicans (and others) to construe and construct their world through goods, commodities, and other tangibles frequently within the context of a festival, a ceremony, a celebration, or simple everyday rituals (Le Wita 1994; Stabile 2004; Cohen 2006).

Both the production (supply) and the consumption (demand) side of material culture, created meaning for the gendered, classed, or racialized structures of social life in public and private spaces (De Grazia & Furlough 1996; Scanlon 2000; Bauer 2004). Moreover, there exists an important ideological shift in how ideologies have conditioned our understanding of these processes. Until the 1980s, under the influence of Marxist analysis, historians focused on the production side, and how relationships to the means of production created class identities. On the other hand, as Leora Auslander has observed, since the 1980s scholars have focused on how consumption itself, not the relationship to the means of production, created class identity (2009, p. 4). In both cases, scholars of the material observed that social, cultural, market, economic, and

political conditions specific to an era condition the production and consumption of objects, goods, and commodities. Thus, by studying how individuals (or groups) relate or use objects to create specific meanings, we gain insight into regime changes, industrialization, urbanization, and other transformations (Auslander 2009).

Consumption, as a category of analysis developed since the 1980s, attracted historians with its broad utility, but not everyone agreed on a clear definition. DeGrazia offered the most useful definition as she argues that consumption encompassed "processes of commodification, spectatorship, [and] commercial exchanges…processes that involve the desire for and sale, purchase, and use of durable and nondurable goods…and images" (1996, pp. 3–4). Specialists frequently distinguished between elite and mass consumption, usually tying the first to monarchical regimes and early modern social hierarchies, and the latter to revolutionary transformations, democracy, urbanization, industrialization, and expansion of the franchise. The historiography, frequently centered on processes in eighteenth-century Great Britain and France, does not neatly apply to the unique social, economic, and historical evolution of Mexico.

In this chapter, we survey how markets, commodification (assigning an economic value to something that previously lacked it), the rise and development of retail, and expansion (or shrinkage) of purchasing power, but also the spaces and material culture of everyday life, evolved across Mexican history. We survey how at different times the state, institutions, classes, and ethnic groups both edified and contested efforts by others to define how things and the way they were used were accepted or legitimated "forms and images of social activity and individual and collective identity" (Daunton and Hilton 2001, p. 11). Objects and their use frequently acted as the medium through which different social actors criticized each other's control of society. We also analyze how the government and business groups (foreign and domestic) colluded to shape the market and to bring to the attention of consumers certain goods, services, and modes of consumption.

Amerindian Cultures and Consumption before 1492

Historians' knowledge of pre-contact civilizations comes largely from studies of material culture and consumption. We draw heavily on the illustrated codices, on murals, carvings, and the findings of funerary remains. The rise and fall of pre-Classic societies such as the Olmec can largely be traced through their commodity—chiefly obsidian—trading networks. For example, Mayan dynasties predicated their power on the ability to construct and maintain trading networks that assured them a constant supply of this strategic material. Polychrome ceramics, jade, turquoise, gold-dust, tropical bird feathers, cacao beans, and slaves were also significant objects of exchange that greatly enhanced elites' status. Nevertheless, without obsidian, the entire social pyramid came tumbling down. The importance of trade and commerce is evident in the design of classic cities, with their quarters for merchants and craftsmen of different ethnic goods and vast public squares where objects helped to give meaning to social class. While warfare was the trademark of post-classic civilizations such as the Aztec, access to trade goods and commodities—such as cotton mantles and salt—was a crucial component of the tenuous alliances of the central valleys. Ideas also flowed along the routes of exchange, diffusing religious cults (such as Quetzalcoatl-Kukulkan, the feathered serpent), crops (the maize–squash–bean triad), and knowledge of metallurgy. Sophisticated Mesoamericans with rich and diverse material cultures were unable to create an affinity with societies that did

not produce or trade for complex goods such as the Chichimec, so they regarded them as barbaric.

Reciprocal exchanges of goods underlay and facilitated the functioning of the Triple Alliance or Aztec Empire (1325–1521). The Aztecs extracted, produced, and redistributed the surplus labor and resources of allies and subjects through tribute and trade that tied together different groups under bonds of obligation. Trade always carried with it the threat of violence (Bataille 2003, pp. 227–28). Critical individuals in the exchange were royal stewards who oversaw the collection and warehousing of tribute, and members of the *pochteca* (merchant) guild who traded for luxury goods, frequently foreign imports, not accessible through tribute. Consisting of 69 different categories of merchants, including the intelligence-gathering foreign and frontier-trade specialist *Oztomecas*, the *Pochteca* helped to create social and political order. They proffered advice on the empire's Treasury Council, alongside the nobility (León Portilla 1984, p. 30). Rather than thinking about this complex polity as provinces united by force and fear of gruesome sacrifices, a more useful approach understands the "imperial provinces" or *calpixcazgos* as tributary units that maintained relative political and cultural independence in exchange for gifts of luxury goods and handing over surplus commodities (Carrasco 1999, pp. 208–9). Thus, the Aztecs and their allies only expanded into areas that had material wealth that they could seize or threaten, and then demand a share of the surplus (Hassig 1992, p. 131). The accumulated wealth was subsequently deployed and distributed strategically, to enhance the power of the state and to tie recipients of its largesse into subservience. Commodities and goods were routinely allotted to the population, not only to legitimate the *altepetl* (city-state) in its function as agent of public welfare during natural disasters like floods, but also as the sustainer of the cosmos through religious ceremonies that included feasting and gifting at lavish expense (Bataille 2003, pp. 229–32). Central to the feast of Tezcatlipoca, for example, was a year-long consumption fest that plied a handsome youth with a year of leisure and hedonism with sex slaves, feasts of great delicacies with members of the nobility, dancing, and much merry-making before this living god was offered up in sacrifice after five days of even more feasting and dancing. Thus, the population understood the empire's might through the consumption of goods and commodities.

Contact, Conquest, and Colonial Society, 1492–1810

The material aspects of the conquest have received, until recently, limited historical analysis. While other studies have focused on "spiritual conquests," biological pathogens, ecological transferences, or on the chaotic nature of Spaniards' dispersion over the Americas requiring royal creation of institutions to mitigate the power of these adventurer-entrepreneurs (Ricard 1966; Crosby 1972; Melville 1994), few have focused on the material conquest. This is clearly an oversight. In addition to bringing their animals, fruits, grains, diseases, Christianity, and slaves to the Americas, Spaniards and other Europeans (as well as Africans and Asians) also brought their material objects and their attitudes towards the tangible. Consumption provided an essential part of conquest and colonization.

A significant portion of Spaniards' evangelization of indigenous peoples included the transference of Mediterranean material culture, particularly to the urban polities of Central and Southern Mexico. Acculturated indigenous allies and subject peoples, from the Tlaxcalans to the Tarascans, transmitted knowledge of European goods and commodities to

peripheral peoples along the western and northern frontiers such as the Pueblos, as the Spanish religious orders did in the Central Mexican population (Gibson 1952; Adams 1974). Spanish women—frequently as nuns, as wives, or inn keepers—taught Indians, from servants to chieftains' daughters, how to handle, deploy, and maintain goods and commodities of European (or other) provenance such as linens, kitchen utensils, fruit, wheat, oil, sugar, and spices (Gallagher 1978, pp. 150–72). Once they assimilated or acculturated to Hispanic ways, they played an important role in the diffusion and hybridization of these consumption patterns (Pilcher 1998).

While the Crown and Church played an important role in the legitimacy of the conquest, private enterprise, motivated by material gain, largely drove the conquistadors and settlers. Spaniards clearly understood the nature of the indigenous polities' economic extraction; for them conquest meant eliminating or intermarrying with the local elites so as to enjoy their wealth. They may have burned Indians' historical and religious texts, but they saved the tribute records and demanded that their new subjects render them the same services, goods, and commodities previous overlords had demanded. The Spanish, following on their experience in the *Reconquista*, retooled the social and economic fabric of the conquered peoples to benefit the victor.

In the absence of racial discourses, consumption played an important role in denoting the boundaries between the socio-juridical dyadic structures that Spain developed in Mexico: the *República de Indios* and the *República de Españoles*. This resulted in the strict enforcement of sumptuary laws restricting who could consume items of apparel (and how much) and other belongings such as horses, carriages, weapons, and gilded objects that were regarded as material markers of racial, ethnic, and class identity. Judicial cases frequently resulted when institutions and elites believed their privileges threatened by transgressive natives, *castas* (mixed race), and lower-rank but enriched Whites who appropriated noble European signifiers, such as weaponry, mules, towered manses, and other privileges of *hidalgos* and corporate bodies. Indeed, by the 1620s, the pious created white bride funds to provide dowries so that poor Spanish girls could attract suitable husbands (Viera Powers 2005, p. 92).

The Spanish *encomienda* and *repartimiento* systems managed indigenous labor and resources, harnessing them as consumers. The *encomienda*, which only functioned until the New Laws of 1542 were enforced with the law of 1549 to dismantle it, gave *encomenderos* who held this privilege the right to extract Indian labor and tribute (Lockhart 1969). In exchange, they provided Indians with religious instruction, military protection, and administered justice. But, many abused the institution to build family fortunes that threatened the consolidation of royal colonial power. New practices replaced the *encomiendas* gradually. The *repartimiento de labor* (also known as *cuatequil*) provided Spanish agricultural enterprises, mines, and construction projects with labor, and was most successful in the period of greatest labor shortage of 1540–1640, when well over 90% of the indigenous population died, but wage labor subsequently replaced it. From the seventeenth century on, the *repartimiento de mercancías* developed in Mexico but not as onerously as in Perú. It assigned to a Spaniard the right to sell European manufactures and draft animals to Indian communities as well as the right to purchase their surplus. A significant discussion has revealed that Indian communities, particularly in central Mexico, used the *repartimiento de mercancías* to overcome systemic limitations of the economy. Through it, they not only gained access to imported goods, but also accessed credit, markets, and networks of distribution that far outweighed the negative impact of

monopoly and price gouging that is often credited with originating debt peonage (Baskes 2000; Menegus Bornemann 2000).

Institutions and corporations worked together with the Crown to regulate neatly the consumption that made orderly urban life possible, ensured social stability, and provided the basics of Spanish material culture. The four main entities—the Crown, the Church, guilds, and city councils—were based in multistoried, class-heterogeneous towns and cities that mingled manufacturing, residential, retail, and civic spaces. At the centers of towns and cities stood markets and retail establishments alongside churches and royal offices, as established in Felipe II's 1573 Royal Ordinances on town planning. Well-ordered, properly-consuming urban populations functioned under the principle of *policía* or "good government," in which individual desires were subordinated to guarantee order, peace, and prosperity (Nuttall 1922; Schuetz 1987; Ortíz Macedo 1997; Kinsbruner 2005; Kagan 2000, pp. 18–44). This order required a steady and cheap supply of food guaranteed by new officials and institutions, such as the *fiel ejecutor*, who inspected weights and measures, but also *alhóndigas* (granaries) that stabilized the price and the *pósito*, a grain reserve designed to abate scarcity and speculation at times of shortages and bad harvests (Ochoa 2000, pp. 20–23, Borah 1958). The *parián* or arcaded market that housed leading mercantile establishments stood at the town center, and along the adjoining streets and districts stood the workshops of guild members lending their trade's name to the street on which they were concentrated. Here and there stood *pulperías*, the indispensible institution that functioned as stores, pawnshops, restaurants, gathering places, and news exchanges, providing a one-stop financial and commercial center akin to a modern convenience store offering lottery tickets, money orders, a version of the modern ATM, and a community bulletin board. Urban consumers (particularly women who made up a majority of householders in late colonial Mexico City) relied upon the *pulperías* for making ends meet. Although the conde de Regla established the Monte de Piedad in 1775 to provide cheaper credit to the middling and more affluent society short on cash, the *pulpería* and private pawning remained an essential part of urban household survival strategies into the nineteenth century (Kinsbruner 1987; Francois 2006).

Antithetical to the Crown's and respectable society's ideal of order and good government was the chaotic scene of most plazas, especially on market days and holidays. Markets patterned on pre-conquest retail traditions resulted in crowds of vendors selling goods and foodstuffs from whatever patch of ground they could claim. Spanish goods and retailers also jockeyed for this open space, occasionally setting up so-called *cajones de ropa* or market stalls. As part of a larger effort to impose order (and raise revenues) upon public space, the Crown sought to regulate retailing; Viceroy Bucareli (1771–9) often remembered for using royal troops to clear vendors from the main square of Mexico City, fits within a longer process of moving markets into permanent structures and under government regulation of hygiene, propriety and, of course, taxation (Agostoni 2003). The most famous of these new permanent commercial structures was the *parián*, catering to a Europeanized clientele by the early 1700s. Mexico City's bazaar-like arcade, aptly labeled the world's first mall, featured purpose-built shops with stalls that displayed and stored merchants' wares, all under the supervision of municipal authorities and the merchants' guilds (the *consulado* or the *gremio de los chinos*). Merchants would not only sell goods, but also function as investment bankers, frequently receiving deposits of significant sums. By the first decade of national independence in the 1820s, the merchants of the Mexico City *parián*, the Parián, represented the

epicenter of the country's commercial transactions, holding deposits for investors, warehousing and distributing goods, and extending credit to wholesalers in other locales (Arrom 1988; Gortari y Franyuti 1998).

Domestic spaces constructed and furnished within institutional and private residences projected and reified the social and cultural assumptions and aspirations of their builders and residents, from the most sumptuous palace to the most humble *jacal* (shack). Whether in residences or monasteries and convents, honorable women, virtuous nuns, and contemplative friars lived behind the enclosure of windowless high walls, in buildings arranged around a series of internal patios that brought light, fresh air, and guaranteed privacy and decency. Different tradesmen—gilders, carvers, painters, upholsterers, and cabinetmakers, among others—completed the interiors, adding beauty and comfort to the built spaces that were differentiated by gender and intimacy. In eighteenth-century townhomes and palaces, the *salón* or *sala del dosel*, located on the main floor and facing the street, functioned as a formal gathering room that displayed elegant portraits and the most luxurious furnishings, while the cozier *salón* or *sala del estrado*, located on an interior patio distant from the street, functioned as a *boudoir*, a space where only women gathered during the day to socialize, read, and sew. Between the feminine privacy of the *estrado* and the grandiose public *dosel*, the *sala de asistencia* or living room (today's "sala") brought together the entire family in the evenings, and during the daytime served to receive informal mixed company. Men's offices and bedrooms mediated between the entrance of the home, at the landing of the building's most grand staircase, and the feminine, intimate interior spaces (Gonzalbo Aizpuru 1995, pp. 125–38; Zárate Toscano 2005, pp. 326–46).

Luxury goods and the spaces in which they were displayed, as well as how these were combined with depictions of their owners, have attracted the attention of art historians, who have been especially drawn to *pinturas de casta* (paintings depicting racial types), elegant portraits, and religious or devotional art (Carrera 2003; Pierce *et al* 2004; Katzew 2004; Rodríguez Moya 2004, 2006). Furniture, glass, carved ivories, lace, and textiles document the existence of complex international trading networks, but also the high caliber of local skilled craftsmen who turned out fine lacquer-work, painted screens, clocks, and even rendered local versions of Chippendale furniture, and other sumptuous objects (Aguilera García 1985). *Gremios* (guilds) regulated the production and retail of manufactured goods, setting standards of taste. For the colonial period, antiquarians and art historians from the Porfiriato (1876–1911) provided much of the background that helped later historians in understanding and conceptualizing the use and deployment of objects and architecture under Spanish rule (Revilla 1893; Baxter 1901; Romero de Terreros 1916–21). Art historians have elucidated the wider context and significance of the production and consumption of goods and their display and deployment in built spaces, as evident in popular exhibits like "Splendors of 30 Centuries," and in the period rooms of the Franz Meyer Museum and the Museo de El Carmen (Rubio *et al* 1990; O'Neill 1990).

The history of consumption and material life in the rural hinterlands, particularly in the central and northern regions, has been explored amply in the historiography on mining, but also in its relation to the growth and development of communications infrastructure, roadways, regional fairs, and mule train drivers (Brading 1971; Rees 1976; Calvo 1997; Castleman 2005). Regional fairs, such as those in San Juan de los Lagos and Chihuahua, provided opportunities for branches of commercial firms in Mexico City, enabling the articulation of regional credit and trading networks all the way to the

Comanche frontier—and even contraband trade from the United States across the prairies by the 1810s and 1820s (González de la Vara 2002; Kenner 1994). We know much about individual merchants, trading companies, and the institutions that oversaw them, but relatively little about the muleteer (*arriero*), who played an important role in the development of internal markets as cultural brokers and diffusers or transmitters of consumption patterns, news, and ideas (Suárez Argüello 1997, 2001; Roche 2000b, 2003). It was no accident that many of the leaders of the Independence movement had ample experience as muleteers—Morelos, Guerrero, and Ascencio, among others—and used their friendship with locals and knowledge of the terrain to their advantage. The haciendas were far from isolated from the outside world (as the historiography initially observed), as the moral economy of these highly specialized agricultural and proto-industrial operations that supplied mining districts with foodstuffs, leather, salt, draught animals, and the occasional light manufacture, frequently required the exchange of gifts of imported fineries on ritual occasions (Chevalier 1963; Nickel 1989).

Conspicuous consumption and lavish display of their riches helped wealthy miners to establish themselves as the colonial elite. Consumption provided the everyday rituals to demonstrate authority. Subaltern Studies, particularly the work of James C. Scott—and to some extent the work of Homi Babha—has begun to enrich analyses of public ceremonies in colonial Mexico, as evident in Beezley, French, and Martin's (1994) *Rituals of Rule, Rituals of Resistance*, in which display and deployment of material culture played a prominent role. In such studies, material culture, consumption, and space allow scholars to better understand how societies negotiated, questioned, and articulated power. Examples proliferate, particularly during the late seventeenth- and late eighteenth-century silver bonanzas that produced the wealth of communities such as Santiago de Querétaro, Zacatecas and Guanajuato, or individuals such as Juan Antonio de Urrutia y Arana, marqués de la Villa del Villar del Águila; Pedro Romero de Terreros, conde de Santa María de Regla; Antonio de Obregón y Alcocer, conde de la Valenciana; and José de Borda (Couturier 2003; Torales Pacheco 1985; Yuste López 1987). Their munificence built aqueducts, churches, palaces, industrial establishments, charitable institutions, and even ships for the Spanish navy, but profits from their entrepreneurial activities extended others the credit that became the engine of New Spain's dynamic diversified economy (Hoberman 1991; Langue 1999).

Credit not only built the fortunes of the rich, but also helped the poor to survive. Moreover, as social and cultural historians have observed, the "culture of everyday credit" allowed women, particularly widows and heads of households of all classes, to liquidate a portion of their movable goods at a pawnshop to meet emergency expenses, to "stretch the family budget," or to allow for the type of consumption necessary for the fulfillment and enhancement of social standing (Francois 2006). We thus understand the practicality of investing vast resources in furnishings, linens, clothing, carpets, tapestries, silverware, porcelain, lacework, and other sumptuary goods quantified as the majority of most seventeenth- to nineteenth-century dowries as a viable economic strategy, and not as dissipation; in material objects, social and cultural capital intersected allowing individuals to use these to meet social obligations and to distinguish themselves from others. Even poor working class women could handily convert their scant jewelry, pots, and clothes into cash to finance a family enterprise or to weather a bad harvest.

The individual and family investment strategy of consumption and collateral credit functioned thanks to the existence of global trade networks that made luxury goods available, particularly the Manila trade that moved through Acapulco to Valladolid and

on to Mexico City, but also the fleet system and its arrival in Veracruz (Yuste López 1984; Castillo 2000; Yuste López 2007). The *galeón de Manila* should best be understood as a transpacific (and circum-Atlantic) Silk and Silver Road, and the social and cultural repercussions of this trade fleet were immense. With viceregal Mexico's international trade (excluding British contraband via Tampico, Cuba, and the Yucatán) in the hands of the *Casa de Contratación* (the House of Trade, based in Seville ca. 1503–1717 and in Cádiz 1717–90), this Spanish body regulated the fleets, their cargo, ruled on commercial judicial cases, investigated passengers, and oversaw the Spanish mercantilist extractive system (Jiménez Codinach 2000). Although the Seville merchant guild (*consulado*) initially controlled all trade within New Spain, the great fortunes and influence Mexico City merchants wielded enabled them to organize their own *consulado* in 1592. Members of this body built great profits and extended credit to all sorts of enterprises, particularly mining and its auxiliary economic sectors such as agricultural and livestock operations; they frequently extended credits to the Crown, and by the seventeenth century, purchased public offices, diversifying their interests and dominating society (Bakewell 1971). Until the advent of free trade in 1790, the *Casa de Contratación* channeled European manufactures to Mexico, oversaw New Spain's exchanges with the other viceroyalties, and guaranteed the monopoly the Crown gave the merchant guild (*consulado*), which on occasion functioned as one of the few banks to which the Crown had recourse, alongside the endowments of convents and cathedral chapters.

The long-term effects of governmental, economic, and social policies known as the Bourbon Reforms (1720s–1780s) have attracted scholars' attention, and this has included work on consumption and material culture, particularly from the perspective of *mentalité* studies. Although many such historians included material analysis as part of their research, many did so focusing on what it revealed solely about the everyday structures of life or the experiences of women and other marginal groups. They quantified wills, inventories, dowries, and other notarial records. Scholars such as Juan Pedro Viqueira Albán focused our attention on the central role that consumption and material culture played in the ambitious social engineering projects of the eighteenth century (1999). Following *Encyclopédiste* denigration of Spain and her empire, *letrados* (enlightened scholars) like Eguiara y Eguren and Jesuits such as Clavigero reacted to assert a protonational pride with narratives praising Mexico's advancement. Material culture—particularly architecture—played an important role in communicating the systemic improvements, thanks to the creation of new institutions such as the Academy of San Carlos. Reforms targeted the working classes for transformation, not only seeking to reform their behavior in a late neo-puritanical way that sought to restrict public inebriation, blood sports, and disorderly merrymaking, but also focusing on the body and its outer coverings. *Ilustrados* like Esquilache, Jovellanos and Sempere y Guarinos sought to regulate clothing, particularly men's attire, to create a sartorial citizenship of which the Crown was to be supreme arbiter (Haidt 1998). The colonists recognized the high signifying value of clothing, as did the rest of the society; among the first thing that indigenous and *mestizo* rebels did during the tumultuous 1760s was to strip Spaniards of their clothes, and don them themselves (Escobar 1768).

Increased efficiency rendered moot the official fiction of New Spain's equality with the peninsula, creating a truly colonial relationship in which trade, manufacture, exports, and state revenue enriched and strengthened Spain vis-à-vis France and the Great Britain. While more regional trade guilds were opened to regulate the explosion in commercial transactions and the great wealth of the economy, the transnational reach

of Mexico—which had profited greatly from its trans-Pacific trade—was clipped, as the Philippines trade was reoriented towards Spain. Ultimately, as Carlos Marichal has shown, the great wealth of New Spain was sacrificed in Spain's efforts to prevail against Great Britain and France (2007).

Nation Building and Consumption (1821–67)

While the nation, citizenship, regionalism, partisan strife, and foreign invasions have dominated the historiography of nineteenth-century Mexico, economic and fiscal historians chiefly addressed material and consumer culture (Tenenbaum 1986; Salvucci 2009). The demise of Spanish control did not destroy the war-ravaged yet diversified economy that began to recover by the mid-1820s. Economic and political instability began with the first empire's dismantling of the tax base and abolition of state monopolies, setting into motion a dependence on foreign loans, on unpopular forced loans, and on risky high-interest, short-term loans from *agiotistas* (money lenders) in order to stave off the revolutions that unpaid salaries prompted. The government's constant penury encouraged praetorian palace politics and diverted capitalists into high-yielding government loans instead of productive enterprises that generated employment. The wave of anti-Spanish hysteria between 1827 and 1829—in no small part fomented by United States and British envoys—destroyed the Spanish mercantile elite through popular xenophobia, class, and political conflict, and prompted capital flight (Arrom 1988; Simms 1999). These factors, together with the Acordada disorders of 30 November to 4 December 1828 that ended with the collapse of Guadalupe Victoria's government and the sacking of the Parián (with losses of $3 million), ended radical republicanism, gave rise to law-and-order conservatives, and reoriented international trade to Great Britain, France, and the U.S.

Despite the brilliant plans of Lucas Alamán and others to build the Banco de Avío (national bank and state investment corporation rolled into one) to encourage industrialization and development, and although significant advances were made in the production of textiles, it ultimately became more profitable to import (or smuggle) cheaper foreign goods (Potash 1983). The price of imports increased owing to the insecurity of transport, and while travelers' accounts indicate a spartan décor among the homes of many reticent to expend great sums redecorating homes that the mob had sacked in the frequent disorders accompanying changes in government, domestic observers noted the profusion of imported finery, noting the widespread use of "things never before seen, except among the most wealthy, such as tapestries, carpets, mirrors, paintings, chandeliers" (Mora 2003, pp. 58–59). As the economy stagnated and the price of real estate plummeted, people previously priced out of property became landowners, but faced difficulties finding markets for their production—at least until the development of railroads and the demographic changes of the final third of the nineteenth century (Chowning 1999; González 1974). Not everything collapsed; the textile industry in Puebla flourished, and the Bajío's population boomed thanks to a renewed silver bonanza in Guanajuato. Mining in Durango, San Luis Potosí, and Guanajuato kept the mints functioning; that of Guanajuato alone coined upwards of 5 million pesos per year in the 1850s (Vázquez Mantecón 1986, pp. 144–46). There was wealth in the country, but in the hands of a few, who flocked to the improvised casinos of the regional fairs and to those in the capital's suburbs of Tacubaya and Tlalpan, or to Europe where a sizeable number of the country's wealthy resided for long periods (Macías-González forthcoming).

Mexicans expressed political and social identities through their purchases, exchanges, and belongings, using goods of local manufacture as well as imports to add specific meaning to their consumption. Exchanges and gifts of food, books, clothing, furnishings, and artwork solidified the networks of friendship and influence upon which politics depended, interweaving favors and obligations, but also allowed patrons to transfer important cultural capital to clients (Macías-González 2007). These exchanges provided members of a social network with media through which they crafted individual and group identity, as suggested in Auslander's statement of "acts of consumption as acts of production" (1996b). Clothing was especially suited to make specific statements. In disputes between individuals, clothing was torn on purpose and targeted to add insult to injury, humiliating and debasing individuals who disrupted the social order (Gonzalbo Aizpuru 2005, vol. III, pp. 482–84). People of the middling sort clung nervously to the respectability that their costumes afforded them, taking greater care with outer coverings, like mantles, cloaks, and coats, than with interior layers; only the laundresses knew the true state of one's clothing—and they were paid to keep quiet (Francois 2008). Lower-ranking officials and military officers only attended the beginning of a ball, for example, because they could not dance long, as the stifling heat of lamps and candles would eventually force dancers to remove their jackets and coats, revealing that they could not afford the price of a full shirt and only wore small pieces of neatly starched, white shirt fronts and cuffs (Prieto 1906, pp. 145–48). The indigenous were kept from visiting elite spaces, such as the elegant promenade along the Paseo Nuevo or the Alameda in Mexico City, where only European-style costume was allowed. Garments could also be imbued with particular political messages; Conservatives clung to the Spanish cape and broad-brimmed hats while Liberals and moderates turned to the *levita* (frock coat) and top hat. Objects—and especially clothing—of foreign provenance (or modeled after such) helped society to mediate "specific questions of identity" (Orlove 1997, p. 18).

British and French goods provided Mexicans in the first half of the nineteenth century with a useful medium through which to articulate and explore broader cultural, social, and political questions. The British book trade and export firms facilitated the transmission of knowledge, the cultivation of taste, and influenced consumer behavior (Roldán Vera 2003). While the French dominated women's finery—largely through the immigration of tailors, seamstresses, and milliners—a rage for all things British (and Anglo-American) swept among men over the nineteenth century, providing the gentry and aristocracy with new goods and fads that dominated men's self-representation (Sweet 1997). Their admiration of English economic, social, and political institutions, but also due to elite men's travel and study in Great Britain, resulted in the emulation of British dandyism and "lion" culture from the 1820s on (Macías-González 2003; Payno 1853; Llorens Castillo 1954, pp. 36–40). This, coupled with British goods' lower cost and the presence of British commercial agents and professionals—particularly mining engineers and surveyors—transformed the dress, customs, and consumption patterns of wealthy, urban males eager to de-Hispanicize themselves and create a new national culture (Grases 1943; Randall 1985; Pearce 2004). British Spanish-language periodicals of the 1820s like Richard Ackermann's *Variedades o Correo de Londres* (with a branch in Mexico), disseminated consumption patterns and gendered practices among Mexican readers, particularly in architecture and interior decoration (Kutcher 1998; Crook 1992; Llorens Castillo 1954, pp. 126–71). As in France, the demise of the ancien régime's

markers of distinction (in Mexico, *esfera* and *calidad)* favored the rise of imported clothing and furnishings as signifiers of domination and social place (Miller 1981).

The presidencies of Antonio López de Santa Anna and Anastacio Bustamante (1830s to 1850s) offer some interesting episodes in the history of material culture and consumption, the least of which were their personal obsessions with uniforms, gambling, and luxury. Bustamante, who never married and had a penchant for handsome aides-de camp, received visitors draped in silks and paisleys, sitting amid pillows and divans, looking more the part of a harem girl than a president. During his last regime from 1853 to 1855, Santa Anna's ministers, particularly Teodosio Lares, concocted all sorts of taxes to put the regime on solid financial footing. They imposed taxes on dogs, carriage axles, windows, finery, salaries, public entertainments, and alcohol consumption, but most importantly they established or increased export duties, property taxes, and the colonial-era sales-tax, the *alcabala* (Vázquez Mantecón 1986, pp. 138–46). Santa Anna reinstituted colonial-era sumptuary laws regulating the use of uniforms and facial hair. In one of the most interesting developments in the history of consumption, race and masculinity, the regime made plans to hire 3 regiments of "white, blond, and handsome" Swiss mercenaries for the dictator's bodyguard (Salado Álvarez 1902, p. 275). Although the pomp and circumstance of Santa Anna was and is easy to caricature and malign, his rule was not all tinsel, smoke, and mirrors; it was good for business. During the 1850s, his policies renewed educational and cultural institutions while improving transportation, subsidizing telegraphs, and repairing roads and bridges (Fowler 2007, pp. 296–307).

"Commerce follows the flag," U.S. Senator and imperialist Henry Cabot Lodge stated in 1895, yet the opposite was true in the case of Mexico's territorial losses to Texas in 1835–42 and the U.S. in 1846–48. Foreign manufacturers had long dreamt of capturing New Spain's and then independent Mexico's unmet need for cheap, quality goods, yet their influence varied by region. In a division that characterized the nineteenth century and much of the twentieth, U.S. merchants, goods, and cultural influences were most prevalent in the north; British, German and French in the center and the south, with all actors jockeying for greater prominence elsewhere. Diplomats and travelers penned recommendations to their compatriot manufacturers, opining how the Mexican market could help solve the Great Powers' increasing problem of overproduction. Joel Poinsett's account of travel through Mexico in the fall of 1822, for example, catalogued the products of every locale visited and underlined how U.S. merchants could benefit from exchanges (Poinsett 1969). Mexican consumer interest in imports belied claims of rapacious economic imperialism, although U.S. dominance of *norteño* consumer markets and material culture provide insight into Mexico's greatest territorial loss in its history. Alexis McCrossen argues the "demand for and availability of foreign goods also contributed to the unraveling of the northern edges of Mexico," noting that U.S. merchants and goods increasingly fulfilled the material needs of northern Mexicans. In New Mexico, the enterprising carpenters who had used leather straps and wooden pegs to improvise hinges until the 1820s soon incorporated Yankee imports into cabinets (Pierce 1996). Central Mexican merchants could not compete due to poor transportation routes, insecurity, and high taxes. By the early 1830s the annual volume of trade in Chihuahua approached 2 to 3 million dollars (McCrossen 2009, pp. 8–9). Indeed, even during the U.S.–Mexican War, hundreds of eager merchants marched behind the invading troops impatient to reestablish the profitable exchange of goods and staples for Mexican silver (Edwards 1847). Quite literally, the central government had failed to deliver the goods

to its citizens on the periphery—in addition to failing to secure the borders from Indians and Anglo soldiers of fortune, or funding education and infrastructure adequately. By doing so, it weakened its legitimacy as well as important economic and cultural ties of obligation and interest that fueled a nascent regional identity among *norteños*.

Consumption and material studies can be a useful way to analyze the rise and consolidation of Liberalism and its transformation of colonial-era real estate tenure patterns. Predicated on the primacy of private property to encourage the growth of markets and manufacturing, Liberals implemented the Reform Laws in the 1850s, following on from earlier efforts in Spain's Liberal Constitution of 1812, and laws passed during the Liberal administration of Valentín Gómez Farías (1833–34). Seeking secularization, a stronger government, and a jumpstart for national economic and industrial development, the Liberals issued decrees they then used as the cornerstones of the Constitution of 1857. Of these, Ley Lerdo (25 June 1856) was the first major land redistribution policy that ended legal recognition of corporate land ownership, transferring the Church's property to its tenants or to bidders in real estate auctions, and threatening the lands of indigenous communities (Bazant 1971). The proceeds from church properties were used to finance the Liberal war effort against Conservatives, and transformed urban centers as monasteries, convents, hospitals, and churches were demolished. These buildings were replaced with a modern urban landscape based on Haussmann's Paris, complete with department stores, bathhouses, boulevards, cafés, administrative buildings, and the latest utilities and transportation infrastructures. While Liberals later compromised their program to develop the war-torn country, they embraced material progress as embodied in French positivism. This created new social spaces and encouraged the consumer culture against which the upper classes performed didactic modernity for the masses, a theme that had been evident since the Bourbon Reforms.

Combined with the Ley Lerdo, changes in the urban geography and formats of retailing from the 1820s to 1850s presaged the dramatic transformation of commerce, marketing, and the development of consumerism during the Porfiriato. Although the Mexico City business community tried to resuscitate the Parián between 1828 and 1843, leading merchants gravitated away from the old center of commerce, into Monterilla, Capuchinas, and Flamenco streets (5 de Febrero, Venustiano Carranza, and Pino Suárez today). These new stores were well-lit, had inviting shop floors, and attractively exhibited goods. Living quarters, storage, and workshops were tucked away, beyond the sight of shoppers. Known as *almacenes de novedades* and patterned after 1820s Parisian *magasins des nouveautés*, by the 1850s they sported large plate glass windows that promoted window-shopping. The practice of "carriage trade" developed, whereby wealthier women would be driven up and down the retail district, browsing from their vehicles, and stopping outside shops, beckoning salesmen to bring them samples to peruse (Calderón de la Barca 1966, p. 35, 168, 200). An arcaded market, the *pasajes*, modeled on those of Brussels and Paris, was raised on the old Plaza del Volador, with 160 stalls (*cajones*) attracting bustling trade until fire destroyed it in 1870 (Martínez Gutiérrez 2005, pp. 25–33).

The tripartite Anglo–Spanish–French debt-collecting blockade of Veracruz in 1861 that precipitated the French invasion that imposed the Second Empire (1863–67), continued the long history of foreign influences on material culture and consumption patterns. Among other legacies, the Second Empire accelerated the development and refinement of the retail trades and entrenched French goods' cachet as the benchmark of modernity and good taste among the upper and middle classes. The imperial court

balls and other rituals of rule ignited demand for sumptuary goods that rippled across society. French-run *almacenes de novedades* in the capital boomed, and expanded both inventories and their sophistication. In 1866 and 1867 Eugene Maillefert captured the growing complexity of urban social, economic, and material life with consecutive publications of the *Directorio del comercio del Imperio Mexicano*. The *Directorio* recorded the expansion of the service and retailing sectors, including the first advertising agency (Maillefert 1992, p. 44). It listed merchants and tradesmen who accompanied the French Expeditionary force, particularly Alsatian jewelers and clockmakers, as well as medical professionals who introduced the latest implements and helped establish scientific societies and medical journals (Martínez Guzmán 2004; Edison 1999; Oeste de Bopp 1965). About 1,000 of the 35,000 invading soldiers remained to open businesses or to take up trades, cementing Mexican love for everything French. The famous Porfirian *parfumier*, Paul St. Marc, was one of these ex-soldiers; his creations and imports scented the *bon ton* for over 40 years after the fall of Maximilian (Garotin 2007; Bunker forthcoming).

Wearing the imported French finery while the country was under occupation was certainly a political act that historians have yet to assess. Rather than festoon his balconies to welcome the would-be emperor, the family of the marqués de San Francisco went into mourning and exiled themselves to the countryside (Romero de Terreros 1926). Liberal populations that experienced Conservative sieges and occupations had more important material concerns than consuming the latest fashions; cities like Oaxaca suffered water and food shortages across the social spectrum. Occupied populations underwent ritual humiliations under the Conservatives, as women suspected of supporting the Liberal cause were publicly stripped and exhibited (Chassen-López 2010).

Importing French goods was more than an afterthought; it was a calculated strategy in France's conflict with Mexican Republicans and with the Great Powers for consumer markets worldwide. French exports to Mexico earned revenue for manufacturers, retailers, and the Mexican Empire, but also starved the Republican government under Juárez whose finances relied partially on import tariffs. The French government subsidized the transportation of imports as they served as ballast on military ships travelling to Mexico. Methodically lashing Mexico's economy to France and its manufactures, Maximilian and Napoleon III established the first regular transatlantic service between Veracruz and Le Havre. Until the First World War, French wholesalers employed commercial privileges that had continued even after the fall of the Empire in 1867 with devastating effect against their Great Power competitors, vaulting over and usually bankrupting British and especially German business houses (Gamboa Ojeda 2004).

Maximilian's greatest material legacy was his plan to redesign Mexico City (Chapman 1975, pp. 105–10). Developed in 1866, the 4-phase, 22-item plan traced new avenues, squares, utilities, and many improvements around the city. Of these, Maximilian only laid out the new Paseo de la Emperatriz (today Paseo de la Reforma) evoking Vienna's *Ringstraße*. Subsequent regimes have implemented much of this plan, opening avenues west and south of the main plaza (5 de Mayo, Juárez, and 20 de Noviembre avenues), re-paving streets, adding gas lights, meatpacking plants, a ring-road (today's *circuito interior*), fire stations, hospitals, cemeteries, and government ministries. Phase two remodeled the National Palace (begun under Díaz and continued after the Revolution). Phase three renovated Chapultepec (Limantour's pet project during the Porfiriato), and the fourth phase, completed by 1866, were the repairs to the Palace of Cortés and its park in Cuernavaca (Ramírez & Acevedo 1995, pp. 138–44).

The Restored Republic (1867–76) and the Porfiriato (1876–1911)

With the Empire's and the Conservatives' defeat in 1867, the victorious Liberals moved to modernize, secularize, and centralize the country, using as many incentives and subsidies as they could afford, making up for the lost decades of political instability and foreign intervention. They looked to foreign investors, immigrants, and an ambitious program of socio-cultural engineering (i.e. continued Hispanization of the Indigenous) that paid attention to material culture and consumption. The reforms of education minister, Gabino Barreda, incorporated new subjects, like civics, which included important consumption lessons in its instruction on etiquette (*urbanidad*) as well as hygiene (Macías-González 2006, pp. 267–97).

The Porfiriato's sustained modernization along North Atlantic models of capitalism produced interpretations that emphasized the role of the federal government and the production side of an export-oriented economy integrated into the world market after 1867. Political and economic historians have overlooked the Porfirian emphasis on cultural modernization and consumerism as the most important indicators of the nation's advancement and that of the individual citizen. In his widely distributed *Guía general descriptiva de la República Mexicana*, J. Figueroa Domenech distilled this sentiment: "If the great credit establishments, the important railroads, and the various factories . . . reveal the wealth of Mexico's soil and industriousness of its inhabitants, the luxuries and good taste of its retail stores reveal the culture and civilization of its people" (Figueroa Domenech 1899, p. 254).

Urban areas, and particularly Mexico City, became developmental showcases for foreign observers, investors, and Mexicans (Agostoni 2003, pp. 81–90). A new commercialized city emerged, with distinct residential and retail quarters, expanding from 8.5 to 40.5 square kilometers between 1858 and 1910, thanks to new transportation infrastructure, new construction technology, and as a result of the Reform Laws' transference of vast amount of real estate from the Church to private enterprise. The regime secularized public space with the construction of urban "monuments of progress" according to Vicente Riva Palacio's 1877 decree. One monument recognized the heroic feats of engineering required for the massive drainage and sewage works completed in 1900 (Agostoni 2003; Tenenbaum 1994). New class-specific residential areas (29 of the 34 neighborhoods built between 1858 and 1910 were constructed after 1883) replaced the multiclass, mixed-use city, bringing great profit to the financiers and real estate magnates who controlled the expansion and development of the city by the mid-1890s (Morales 1987; Lear 2001; Schell 2001).

In the new subdivisions, single-family residences incorporated the latest amenities and ideas about interior distribution, functional differentiation, and gendered spaces that afforded family members greater privacy, incorporated vast spaces for entertainment that enhanced the family's status, and affected gender. Men had suites of rooms with gyms, smoking rooms, billiard parlors, libraries, and home offices equipped with gadgets like telephones and telegraph connections that allowed them to spend more time at home. This helped the man to develop a domestic masculinity, in which middle and upper class males who could afford to hire professional craftsmen opted to dabble in hobbies such as do-it-yourself home design and decoration, as well as gardening and pet-keeping, both as a palliative for the stress of life in the world of money and politics, but also as a way of building a better relationship with his wife and family (Gelber 1997, pp. 72–75). Thanks to the telephones, telegraph lines, and private trams (prior to the arrival of the

automobile) they could spend less time at the office and instead take on more responsibility for bringing up children or for assisting their wives in the management of the household, tinkering with home remodeling projects, or constructing art and antique collections (Macías-González 2009). Women in the home performed important tasks, from menial tasks to hostessing, enhancing the family's status. Under the direction of matrons, homes designed and frequently decorated by men became contact zones in which orientalist decorative schemes allowed the family vicariously to experience empire while also concocting national taste through commissioned artwork that also helped to create the family's public profile (Francois 2008; Hoganson 2007; Harris 2002; Tosh 1999; Watson 1999; Macías-González 1999, ch. 3).

Urban populations increased rapidly; the capital swelled from 200,000 in 1858 to 330,000 in 1895, and 471,000 in 1910. Regional capitals such as Guadalajara, Puebla, and Monterrey, and even small towns like Torreón and Ciudad Juárez, grew dramatically. The "modernity" of the capital, while exemplary in its scale and expense, paled with the cost of public works in the regions; railroads crisscrossed the country by the 1880s, electrical and telephone utilities by the 1890s, and vast bonds were issued to finance new state and municipal buildings, schools, and trams. Indeed, the material transformation of locales like Chihuahua City were so drastic that Díaz, as he traveled north to confer with President Taft in 1909, was incredulous of prosperity and modernity evident in the city's architecture, poignantly asking "where are the common people?" only to be told they were all about him, dressed in their Sunday-best (Macías-González 1995).

The modern consumer culture that emerged in the towns and cities wrought changes on architecture, social relations, and how Mexicans construed and constructed their world. Increased urbanization and mobility along the 18,000 kilometers of railway (as well as a vast telegraph system, new roads, seaports, telephone networks, and reliable postal delivery) complemented existing transportation networks like mule trains (Connolly 1997). This network fused together towns, cities, and countryside, allowing for the diffusion of the ideas, objects, and practices of modernity into the rural hinterland—and flooded the country with U.S. goods (Weber 1976).

Historians must avoid making grandiloquent statements about the "modernity" of relative expansion and growth of material transformation linked to foreign capital. Early eighteenth-century mule trains transported Flemish and French finery to the most remote outposts of Spanish colonial civilization, such as the Villa de Paso del Norte, in Nueva Vizcaya (modern El Paso), where the not-so-rustic populations sported powdered wigs and hired dance instructors to teach their children the intricate steps of the minuet (Martin 1996). The so-called "Frenchification" (*afrancesamiento*) of consumption in the second half of the nineteenth century was clearly not a new phenomenon. Scholars have failed to recognize the complicated processes of cultural transference, circum-Atlantic (and transpacific) cultural flows, and, most significantly, they have ignored the actions of Mexicans as cultural entrepreneurs and transmitters. How did they experience, study, compare, mediate, improvise, and innovate? Particularly useful is the emerging literature on the circulation and transference of technical knowledge and material culture through travel (Roche 2003). Often forgotten, for example, is how many of the ideas that Lucas Alamán attempted to institute in Mexico were picked up as he traveled across Europe alongside Francisco de Fagoaga, attending lectures, visiting learned men, and purchasing books.

Mexicans living and traveling abroad did so in much larger numbers during the Porfiriato due to the improved travel conditions, the much-diminished cost of the

experience, and the rise of a tourism industry. While faith and hygiene contributed to the popularity of pilgrimages and tours to watering holes in Mexico, the attraction of the outside world lured many to Rome, Lourdes, and the Holy Land, as well as Baden Baden, Evian, and Karlsbad. A two or three week stop in Paris was de rigueur for all Mexicans in Europe. For a lucky few, the city of light became home. The Paris Mexican colony, which numbered as high as 1,500, merits further attention (Macías-González 2010). Of these, diplomats—and not only commercial agents and consular officers, but also envoys especially commissioned to purchase armaments, to hire architects and artists, to acquire furnishings for government offices, as well as the high commissioners that directed Mexican exhibits at world's fairs—established consumption trends and transmitted important knowledge about goods and consumerism. This included articles in the Ministry's journal about how to increase exports and market goods, dispatches about trends and fashions, and studies on technical innovations. The development of automobiles, for example, prompted numerous cables and exchanges between diplomats abroad advising the dictator, cabinet members, governors, and other nabobs about engine horsepower, combustion, suspension, finishes, and upholstery. On his frequent trips to visit physicians and health spas to cure his constant dyspepsia, the minister of Finance, José Y. Limantour, scoured shops and workshops to check up on special orders for the nation and the leadership, utilizing diplomatic agents to seek information and to conduct market research (Macias 1999, ch. 5).

The number, variety, and quality of home furnishings available expanded due to the greater availability of imports, but also the rapidly expanding number of manufacturers. Benefiting from high tariffs imposed on imported furniture, cabinetmakers, upholsterers, and furniture makers expanded. While the largest number of workshops and factories developed in Mexico City—some 20 by the end of the Porfiriato—vast furniture factories employing hundreds of employees, such as German-born Jorge Unna's Gran Empresa Industrial—the nation's largest manufacturer of furniture—had over 300 employees. American-style furniture was easily duplicated, but it was heavier than the French, Austrian, and English bentwood style that Mexicans preferred because it was light, durable, easy to transport over difficult terrain, and readily adaptable to different decorating schemes. Cast iron and brass beds were also manufactured in great numbers—and were widely regarded as the most hygienic option in the market. Department Stores such as Palacio de Hierro also established workshops to manufacture ready-made and special-order furnishings, and provided decoration services to its customers (Gringo 1921, pp. 40–42).

Despite the Porfiriato's impressive urban development and evidence of material progress, the vast majority of the population remained rural and isolated. Moreover, although generating great wealth, the fundamental inequalities of the Porfirian development model ensured that the large majority could not and did not share Domenech's positivist vision. With important implications for how we understand the causes and nature of the 1910 Revolution, historians have identified the developing cultural rift between those who embraced the rapid changes defined as "progress" and those who eschewed them in preference for the hybrid Iberian-indigenous cultural heritage (Beezley 1987), although there existed regional variants. Jane Dale Lloyd Daley's work on Chihuahuan *rancheros* (small landowners) and *medieros* (subsistence farmers), for example, noted their appropriation of American material culture, language, and even frequent travel and seasonal migration to the U.S., while strongly resisting the presence of Mormons in Northern Chihuahua (2001).

The country's stability and favorable business conditions attracted larger numbers of immigrants than at any point in the nineteenth century. Germans reaped benefits from familial and regional trade networks established since the Hanseatic League's early recognition of Mexico in the 1820s, which positioned Hamburg as a source of German manufactures, particularly clocks, tools, farm implements, and musical instruments. German capital flooded into Mexico from 1888 to 1893, setting off a period of expansion (Passananti 2006). The Casa Boker became one of many successful German-owned and operated hardware stores, a base from which they would subsequently expand into machinery and pharmaceutics (Buchenau 2004). Spaniards dominated small retail operations that reached the lower middle and working classes, namely grocery stores and small pawnshops, earning profits and hate from their usury. While the British lacked the language skills to play a significant role as retailers, London clothiers sent agents with textile swatches, samples, and catalogs to take elite men's measurements, providing within a short turn-around entire wardrobes for the season (Macías-González 2003, p. 227).

Owing to the great prestige of Gallic goods and mores in the nineteenth century, French—and francophone Belgians and Swiss—left their mark on Mexican retail, light manufactures, and textile production, but also dominated elite private confessional instruction. A relatively small, but well-connected community (as many hailed from Barcelonnette in the Valley of Ubaye in the southern French Alps), the French numbered some 7,000 individuals, mostly single males, who worked in 214 commercial houses in 31 towns and cities throughout the country (Pérez Siller 2004, p. 91). The French had long dominated the millinery trade, and introduced retailing innovations, establishing department stores well in advance of their emergence elsewhere in North and South America. They also established vertical production systems that allowed them to control costs, increase supply, and gradually reach a broader market and to penetrate it further, particularly thanks to traveling salesmen, catalogs, and credit mechanisms (D'Anglade 2006). French establishments served a large public, not only the middle and upper classes; their success stemmed from manufacturing low-cost good, copies of costlier imports adjusted to local taste and budget. They invested their profits from retail along the Mexico City–Puebla–Orizaba axis in growing cotton, textile mills, and, drawing on hydraulic power, electrical plants primarily in Veracruz (Gamboa Ojeda 2004). In addition to developing the modern cigarette industry at "El Buen Tono," the French built furniture factories, established a host of light manufactures and also had gun, pastry, perfume, and other specialty shops (Bunker forthcoming; Génin 1933). The gradual secularization of the Third French Republic's educational system between the 1880s and early 1900s expelled many religious orders and these arrived in significant numbers in Mexico so that, by 1905, every major Mexican town—and even small locales—had French nuns, brothers, and priests conducting France's *mission civilisatrice*. This especially affected middle, upper-middle, and elite girls, who became the primary market of the *colegios franceses*, which instilled, via these "Angels of the Home" not only the lessons necessary to participate in the social and cultural life of their milieu, but a familiarity with the objects required for the proper running of a household on the French model (Bellaigne 2007, pp. 166–198; Cabanel *et al* 2005; Torres Septién 1997). Poor students who attended these schools on scholarships received free uniforms, machine-made shoes, and adopted the grooming habits of their betters, so as to calm the concerns of wealthy families disquieted by the social experiment. University and technical school texts were written in French, and only secondarily did English receive

attention. Until the Second World War, French maintained an aura of distinction and refinement that was only gradually displaced by English.

How did new fashions and objects transfer to the poor urban and rural populations, which historians have long observed as remaining reticent before modernity? In isolated regions, such as San José de Gracia, regional trade networks active since the colonial period continued to operate, exchanging traditional products such as cheese, wax, and honey for new manufactures; travelers to the world beyond the sound of the village bells returned with stories about newfangled contraptions and brought with them new ideas and goods (González y González 1974). In addition to the socially-transformative work of schools, civic pageantry, fairs, and exhibitions, significant consumption transmission was carried out by itinerant peddlers, but most notably (and understudied!) by migrant workers, soldiers, and servants in urban households. On their return home for the holidays, they took gifts both new and used, and passed on knowledge about gadgets observed or used in the towns and cities (Roche 1994). Another important transference occurred when the middle and upper classes carried out charitable work providing the children of the urban poor with clothing, shoes, toys, books, and games, as well as healthcare and nutrition (Macías-González 1999, ch. 3).

Few historians have looked at the dramatic changes wrought upon the urban landscape by commercial architecture and spaces for consumption, whether of goods, services, or leisure. Over time, open and enclosed markets, bazaars, street vendors, tailors, seamstresses, milliners, ready-made (often used) clothing retailers known as *cajones*, pawnshops, specialty shops, and other retailers had carved out spaces of consumption for differing social strata. In Mexico City, a fashionable shopping district demarcated by Plateros (today Madero), Tlapaleros (presently 16 de Septiembre), and Capuchinas (today's Venustiano Carranza) emerged by the early twentieth century, in which 25% of all the country's commercial transactions took place (Johns 1997). Yet, as criminologists and authorities noted, there developed elaborate networks of class-transgressing thieves and shoplifters who, made up to look like respectable shoppers, bamboozled shopkeepers out of tens of thousands of pesos each year (Bunker 2010). Other crimes related to consumption included trademark infringement or the illegal manufacturing of knockoffs and falsified liqueurs, soaps, scents, medicines, and other goods, particularly imports, which demonstrates that the importance of the signifying power of these goods was greater than their physical substance and utilitarian efficacy. Amidst the crime and illicit practices, there developed in major cities a plethora of private or semi-private spaces of commercialized leisure. Restaurants, cafés, expatriate clubs (le Cercle Français, el Casino Español, l'Orfeó Català, the Casino Alemán), bathhouses, spas, theatres, and the beer gardens and amusement parks known as *tívolis* (that served as grounds for events ranging from French independence celebrations to charity bazaars known as *Kermesses*) provided the illusion of liberal equality of access yet restricted access through financial and social barriers or physical distance. To keep up with the growing numbers of foreign tourists and investors, new hospitality services developed, such as catering, bars, and hotels, which also served government clientele, making available new spaces, new experiences, and new practices.

Of all the new urban spaces, the department stores or *grandes almacenes*, became emblems of Porfirian splendor and the rise of a modern consumer culture. Rivaling and arguably surpassing churches in their height and splendor, department stores boldly asserted the city's secular and commercial future. Although the Parisian "Palaces of Consumption" such as Aristide Boucicault's *Bon Marché* had only appeared in the late

1860s, by 1891, Mexico City's first purpose-built department store, *Las Fábricas de Francia* provided the capital with an icon of nineteenth-century bourgeois culture's "identification with appearances and material possessions" (Miller 1981). Legend holds that onlookers dubbed it *El Palacio de Hierro* for its iron framework and great height. Its 25,000 square feet of floor space (doubled by 1900) distributed over 5 stories that towered over neighboring structures, accommodated a large clientele, and created a vast, light, and airy expanse that exhibited large quantities of goods using enormous plate glass windows, display cases, and electric lighting. Other features, such as indoor plumbing, pneumatic tube systems, ladies' rest areas, and elevators, heightened its appeal and representation of modernity. The *Palacio*'s set prices, free entry (no obligation to buy), accepted returns, catalogue sales, and decorating advice transformed the shopping experience from one of conflict, haggling, anxiety, and tension to leisurely relaxation.

How did these innovative retailers begin to commercialize or commodify holidays? The tradition of purchasing a new suit of clothes for religious holidays began in Spain, especially for men at Corpus Christi, leading to advertising of new fashions, and was one of many consumption norms that early national Mexico inherited. Religious and civic festivals were undoubtedly important times to promenade and exhibit a new suit of clothes, putting new fashions on display for all to view, desire, and emulate. Relatively little has been written about this, but we know that charity fairs, manufacture exhibits, and world fairs incorporated and celebrated the nation, and that early trademarks—most notably cigarettes and beer—branded national heroes, capitalizing on the state's educational system and its creation of a national culture. Charity fairs, organized to celebrate the dictator's birthdays or reelections, had corporate sponsors and because these events coincided with national holidays and anniversaries of battles in which the dictator had played a role, resulted in the commercialization of holidays. Currently no research has examined how retailers commodified Christmas in Mexico or how they worked to institute gift giving and exchanges on Christmas Eve in lieu of the traditional regalement of workers and children on the feast of the epiphany, January 6. After the revolution, the new constitution institutionalized profit sharing and the payment of the *aguinaldo* (Christmas bonus) providing a great boon to merchandisers.

Goods and services offered in department stores and specialty shops helped entrench a new class identity—the *gente decente* (decent folk)—who based their propriety on their ability to acquire and deploy a material culture of European provenance, even if at times it relied on cheap, domestically-produced copies and brands that satisfied their needs and their income levels. Innovative credit formats, such as layaway and rent-to-own, made the trappings of *gente decente* class aspirations accessible, as did a thriving trade on used goods, or recourse to cottage industries that made knock-offs. Tailors and seamstresses—when not mothers and wives—frequently altered and resized garments, as families with limited means passed hand-me-downs to younger children. Clothing budgets frequently consumed a significant proportion of single men's incomes; standard practice at banks and offices included pay advances to cover the cost of clothing or arrangements with retailers for favorable terms and discounts. Clerks, tellers, teachers, and other middling professionals clung to a suit of clothes as the marker of the respectability to which they aspired, and which they struggled to support and maintain. On special occasions—weddings, pageants, school festivals, and balls—men lacking the appropriate costume could rent formal wear and avoid sartorial embarrassment (Iturbide 1941, pp. 28–30).

For individuals living in the countryside, local dry goods stores presented an assortment of national and foreign manufactures—and lines of credit that gave shop owners

great influence in their community. Such retail establishments frequently served at the heart of complex regional economies that included light manufactures, agricultural operations, and raw materials processing. In the isthmus of Tehuantepec, for example, Juana Catarina Romero established a commercial, credit, manufacturing, real estate, and political empire that transformed her into an important cog in the Porfirian political machinery. Beginning from humble origins as a cigarette vendor and Liberal spy in the 1850s and 1860s, the famed Juana Cata befriended bishops, generals, and presidents. She traveled widely in Europe, the U.S., and the Levant, observing, copying, and learning about technology and material culture. This allowed her to modernize regional costume through the incorporation of new textiles and patterns, bringing machine-made clothing and accessories to her indigenous and *mestizo* customers. To facilitate her growing import activities, she lobbied for improvements in railway and steamship connections that also allowed her to export her prize-winning sugar and spirits and to import textiles from elsewhere in Mexico and abroad. Her store, "La Istmeña," extended credit to all, building a fortune of over $500,000 pesos at the time of her death in 1915 (Chassen-López 2008).

Other Porfirian consumption and retailing changes included the rise of salesmanship but also the marketing of goods across great distances. Railways, improved mail services, expanded banking and credit infrastructure, as well as economies of scale and better printing facilities and higher quality illustrations through rotogravure, made it possible to develop a thriving catalogue trade and to hire salesmen, distributors, and representatives in the most distant points of the country (Bunker forthcoming). Lithographs, half-tone engravings, and rotogravures made more images available, that, combined with written text, placed important tools into the hands of merchandisers as well as educators, who took to using illustrated textbooks known as *Lecciones de cosas*. These familiarized children in isolated locales with the material culture of cities and other cultures. Marketing and retail technologies thus instilled critical thinking skills, providing children images associated with concepts and developing vocabulary while teaching them to read, write, and compute (Macías-González 2010).

Recent scholarship seeks to understand how much of the era's development, such as transportation, housing, food provisioning and regulation, manufacturing, and indeed some of the nascent social legislation, affected the expanding population of poor and middling inhabitants in urban and rural areas. Authorities clearly understood the revolutionary potential of frustrated consumers, and not only worked hard to monitor, repair, and construct markets that delivered plenty of food to the population, but also, when a rise in grain and beef prices between 20 and 40% between 1907 and 1910 sowed discontent, the regime stepped in to boost food imports (Ochoa 2000, pp. 25–28). The iron horse had contradictory effects: while it brought jobs and improved connections to the outside world, development of railways created land and labor conflicts, facilitated the government's ability to repress distant regions, and established internal routes of circulation (new markets, access to educational opportunities, and opportunities for leisure travel and pilgrimages). Moreover, it represented the trope of development in civic language and propaganda (Van Hoy 2008). Pilcher has shown, for example, not only how migrants flocking around food stalls in urban areas developed a national cuisine, but also how the public's taste for freshly-slaughtered meat refused to adjust to new "hygienic" meatpacking plants and fostered a grey market of neighborhood butchers, much to the dismay of modernizing elites and investors (2006). Susie Porter has shown that women workers carved out a fragile respectability that largely depended on their consumer

lifestyle, particularly their clothing and housing arrangements (2003). Their leisure interests established spectacle circuits that attracted international and local talents to the stages and tents (*carpas* and puppet theaters) (Beezley 2008), creating a mass market of urban entertainment that anteceded the arrival of the cinema and radio. Guillermo de Landa y Escandón, the anglophile Governor of the Federal District, recognized the revolutionary capacity of workers and middling folk, and co-opted them through the establishment of the *Sociedad Mutualista y Moralizadora de Obreros del Distrito Federal,* in no small part due to demands to improve their standard of living and desire to expand their purchasing power (Ávila Espinosa 1993). Decades before, Carmen Romero Rubio de Díaz, the first lady, worked to provide staple goods and access to resources for working class women—as well as a smattering of social services such as childcare, clinics, and schools—through the establishment of the Casa Amiga de la Obrera in 1887 (Blum 2001). Although historians have been attracted to Porfirian workers' organizations—leaving aside historiographic debates over whom to include under the label—and political groups, recent literature (Breen 2004) demonstrates that we can profit more from analyzing the Porfirian workers and popular classes as consumers who became revolutionaries.

Note

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Consumption and Material Culture in the Twentieth Century

STEVEN B. BUNKER AND VÍCTOR M. MACÍAS-GONZÁLEZ[1]

The consumption and material culture of twentieth-century Mexico reflected the government's cultural and economic projects, starting with the revolution, for national integration and development as well as the population's embrace or rejection of these policies. From the 1920s and especially for the three decades after, the leadership of the revolutionary party (known as the PRI after 1946) implemented policies of economic nationalism and state-managed industrialization known as Import Substitution Industrialization (ISI) and its accompanying "Hecho en Mexico" ("Made in Mexico") campaign to convince consumers to buy domestic goods (Gauss forthcoming). Economic development required government intervention in both national production and consumption. Related and simultaneously, it sought to construct an official nationalism and national identity, *Mexicanidad*, with the goal of morally and materially regenerating the population. During the so-called "Mexican Miracle" from the 1940s through the 1960s, the government did indeed appear to deliver the proverbial and literal goods to its citizens as industrialization propelled the country towards a more urban and consumer orientation. A middle-class lifestyle of home ownership, new appliances such as blenders and refrigerators, and perhaps even a car appeared increasingly attainable; this social class doubled in size to 25 percent of the population in the 1940s alone. New spaces of consumption proliferated, from suburban retailers to supermarkets and later hypermarkets, and even federal government efforts to turn the heavily industrialized northern border zone into a getaway destination for both national and foreign shoppers and tourists. Moreover, average annual Gross Domestic Product of between 5 percent and 7 percent raised revenue with which the government wove a social safety net that favored urban and particularly middling and organized working class citizens. By offering health care through IMSS (the Mexican Institute for Social Security), expanded grade school and postsecondary education, and especially subsidies for housing, the government sought to legitimize its authority by making the "Mexican Dream" come true. A mass culture developed, promoted and shaped

by the rise of mass media technologies of print, radio, television, and film in whose representations of *Mexicanidad* and national progress consumers found powerful and often standardized depictions of the good life.

Such a rosy depiction should not overlook the reality that business interests trumped those of consumers in the calculations of policymakers. Government and business allies varied in their care for the quality of goods produced under their protectionist policies that slapped increasingly high tariffs on imported goods or simply limited or prohibited them with quotas set by trade controls. Moreover, government co-option or outright coercion of labor responded to the demand of business groups for low wages in order to stay profitable and competitive. Purchasing power for those on the bottom rungs of the economic ladder remained weak. As the Miracle unraveled with devastating inflation beginning in the 1970s and the economic collapse of the 1980s, consumers at nearly every level were devastated. Even today, workers have about half the purchasing power they had in 1970, with minimum wage salaries having lost 66 percent of their purchasing power since 1982.

Daily consumer choices and increasingly drastic efforts to achieve the Mexican Dream promised and portrayed by the government and the mass media, revealed the widening gap between many citizens' consumption expectations and the priorities and capacity of the PRI regime. For example, despite efforts to Mexicanize consumption and material culture, the "allure of the foreign" remained overwhelming. What did change was the displacement of European with U.S. cultural and material influences on Mexican models of modernity and aspirational consumption—with certain exceptions, particularly among certain sectors of elite society. In other words, the Mexican Dream promoted in the post-Second World War years closely replicated that of the American. The two great national diasporas of the twentieth century—one from the *patrias chicas* of the countryside to the city and the other to the United States—are equally if not more significant to understanding the relationship between the national politics, character, consumption, and material culture. In their quest for employment and a better life, these migrants transformed their villages, towns, and nation with their new expectations, attitudes, and goods acquired during their peregrinations. The pull factors that have fueled these two diasporas indicate the rising expectations of individuals and communities and the lengths they will go to achieve their goals. The push factors—willful neglect of rural development in the first instance and the inequalities and subsequent collapse of the PRI development project in the latter—reveal the interwoven strands of poverty and necessity in the culture of desire that characterizes much of modern Mexican consumption (McCrossen 2009).

The Revolution and a New Society (1910–1940)

The Revolution redefined politics, transformed society, and greatly influenced the country's material culture, most notably prompting large population displacements, especially rural migration to the comparatively unscathed urban centers. In the process, regional identities, local accents, community culinary practices, and parish attitudes toward material culture evolved toward common forms, as the conflict brought into contact regions that had remained relatively isolated. The revolution set off a process of standardization that increased gradually. Outside of strategic nodal points on the railway networks, such as Celaya, Torreón, and Ciudad Juárez, relatively little damage came to the urban centers, and even the heavy shelling of the 1913 "Ten Tragic Days" in the capital was rapidly

repaired. Except for brief episodes of scarcity at the peak of the fighting, many barely could tell that a revolution was underway.

The politics of consumption shed light on the revolution. Feuding factions sought to "deliver the goods" to supporters, seizing and redistributing property and resources. Revolutionaries desacralized the ancien régime by offering up haciendas to looting, followed up by festive bonfires in which the looters burned the artwork, musical instruments, books, and luxury furnishings that did not interest them.(Macías-González 1995). As provisional governor of Chihuahua in 1913–1914, General Francisco "Pancho" Villa proved popular because of his ability to provide cheap beef and to guarantee a supply of commodities to the population (Katz 1998: 421–422). The revolution featured refugees and material destruction, with grand pianos heaved off balconies, wallpaper and upholstery stripped to reveal valuables, and luxurious furnishings broken up to fuel cooking fires that were kindled with armfuls of books, accounting ledgers, and torn up parquet floors (Azuela 2006: 39). Conversely, the federal army's inability to supply its garrisons and local people with foodstuffs signaled the end of their control of a region— and required their relocation to towns that they could supply and thus hold. Political instability, exile, displacement, and precarious economic conditions—including different rebel currencies, hoarding, wholesale opportunism, and human suffering—spread. Foreign merchants found themselves easy targets, despite efforts of their governments to protect them. In particular, Spaniards who dominated the small merchant and pawnbroker businesses bore the brunt of consumer riots. Women as managers of household consumption led these riots. They did so not only to stave off family starvation but also the social declassing that was threatened by both shortages of goods and the availability of the popular credit that had traditionally oiled the patterns of consumption (Francois 2006; Lear 2001: 299–340). Finally, by 1916, revolutionaries representing the interests of the middle class co-opted labor and peasant interests and moved to establish normality and respect for life and property.

Political instability, especially factional in-fighting, decreased after the adoption of the 1917 Constitution, which affected everyday material living conditions, enacted labor regulations, and redefined the boundaries between public (or national) and private property. Abandoning nineteenth-century liberal ideas about private enterprise, Article 27 established private property as a privilege and not a right, reserved subsoil natural resources as the property of the nation, and limited conditions for foreign investment and ownership of property. Most notably, as people in the countryside—and especially the indigenous—soon discovered, the new constitution allowed the government to intervene in general living arrangements under the guise of public health policies. Article 123 established the right to strike, the 8-hour workday, established a minimum wage, protected pregnant women from excessive physical work and granted them maternity leave, as well as establishing rights to enjoy leisure and vacation, profit sharing, medical care, housing, and a Christmas bonus (*aguinaldo*), but its enactment was piecemeal across economic sectors. Article 130 established state ownership of religious buildings and property. Application of these rights was gradual and—as evident in the Bucareli Accords of 1923—their implementation satisfied political expediency.

Under presidents Venustiano Carranza (1917–1920), Álvaro Obregón (1920–1924), Plutarco Elías Calles (1924–1928), who continued to rule by proxies in 1928–1934), and Lázaro Cárdenas (1934–1940) the middle classes rose to national prominence allied with workers' and peasants' groups, business, and the army. Starting as the National Revolutionary Party (PNR), and subsequently becoming the Party of the Institutionalized

Revolution (PRI), the official party created labor and peasant interest groups, the Confederación de Trabajadores de México (CTM) and the Confederación Nacional Campesina (CNC), to co-opt workers and campesinos, and defanged the armed forces, subjecting the generals to civilian rule. New businessmen's organizations—heavily representing Mexico City and thus forever skewing industrialization to be highly centralized—collaborated with, or indeed became incorporated into, the state and helped it to oversee the economy, foster development, and create public policy. These included: CONCANACO (the National Confederation of Chambers of Commerce, founded in 1917), the Employers' Association COPARMEX (the Confederación Patronal de la República Mexicana, founded 1929) and financial institutions such as the Central Bank BANXICO (1925), the Bank of Foreign Trade BANCOMEXT (1937), and NAFINSA, the National Development Corporation (1934). By the late 1930s, big business and labor interests squeezed the other sectors—peasants and the armed forces—bringing a reduction to land redistribution and undercutting the size of the army and its budgets. As an umbrella organization grouping together many special and often competing interests, the one-party regime gradually channeled resources into creating "stabilizing growth," which meant government subsidies to big business and expansion of benefits to workers, from health to housing, food subsidies, to stores for the party faithful, and programs that delivered all kinds of goods from the 1930s on through a conglomerate of alphabet soup agencies from which emerged a network of social agencies. These would ultimately provide the regime (government and party) with the ability to police proper consumption and construct identity through material culture.

The questions asked of the population in the 1921 census help to demonstrate how the revolutionaries used material culture in the first half of the twentieth century to formulate social policy and development strategies. The census quantified material conditions and aggregated certain combinations of furnishings, diet, linguistic practices, level of education, and relative comfort to measure the ethno-racial cultural level of the population, adhering thus to liberal fictions about the non-racial categories of citizenship. Bureaucrats thus classified the population according to standards of living predicated on North Atlantic consumption norms deemed as necessary to convey material dignity to the indigenous, rural, and racially hybrid urban proletariat of the country's center and south (Wilkie 1967). With one out of five citizens hailing from indigenous communities, one half of whom did not speak Spanish, the government explored numerous ways in which to use schools, collective farms, and the family to integrate the Indian into the nation and to impose a highly Europeanized *mestizo* as the national ideal. International standards of beauty facilitated the operation thanks to the growing presence of international film and advertising that used racialized images to communicate beauty standards. Cosmetics purveyors stepped in to facilitate the transformation of tawny phenotypes, providing powders, bleach creams, hair dyes, and hair relaxers to those eager to adhere to new, racist and colorist standards of beauty (Hershfield 2008).

Ambitious efforts to transform and assimilate the material culture of different Indian groups were implemented over the 1920s and 1930s by creating "cultural missions" of teachers, health workers, and agricultural advisors who fanned out across the countryside handing out textbooks, wielding nail clippers, combs, and shears, and bringing sewing machines, tractors, and store-bought western-style packaged clothing as the answer to the ills affecting poverty-stricken communities. At times wavering between creating culturally sensitive schools in Indian villages or taking indigenous children to educate and assimilate them in urban schools, revolutionary regimes attempted a number

of strategies to cope with the country's "Indian Problem" under the leadership of Education Secretaries José Vasconcelos, Moisés Sáenz, and Narciso Bassols. Sáenz and Bassols had identified the importance of transforming the "domestic economy" of the gender-complimentary indigenous household, and sought to acculturate Indians to Spanish-speaking urban Mexican ways. Although the revolutionary leadership admired Indians' "family values and patriarchal order," they criticized their material conditions; if Indians changed their diets to reflect those of urban Mexicans (i.e., ate more protein, replaced maize with wheat, and fewer vegetables) and abandoned their traditional attire and homes, they could become less of a hindrance to development (Corzo 1937). Meeting initial resistance, coupled in part with the counter-revolutionary Cristero War (1924–1927), rural people eventually became more receptive. After 1936, President Lázaro Cárdenas' creation of the program of regional Indigenous Congresses, and later the Department of Indigenous Affairs, signaled a change in strategy (Muñoz 2009). Electric corn grinding mills (*molinos de nixtamal*) "dignified" women's work, liberating them from the back-breaking labor required to make tortillas, introducing "healthy" cooking platforms, tables, and chairs that elevated activity from the "unhygienic" ground level, to higher surfaces. Extra time would be devoted to making handicrafts with which to supplement family income, but also kitchen gardens and cooking and sewing circles at cooperatives and community centers that sought to improve diets and family health. Community health educators and nurses, telephones, better road connections, and barbers, some argued, would go a long way towards "modernizing" the Indian. Instructors in the Department of Indigenous Affairs, working with community leaders, also sought to change Indian huts of wattle and daub, transforming them into more solid, well-ventilated structures with windows and doors that provided more air and sanitary facilities. Other innovations included separate sleeping quarters for children from parents (Loyo 1999).

The revolutionary government's efforts to standardize consumption patterns across the country were aimed not only at the indigenous but also, as Nichole Sanders has shown, the urban working poor and lower middle classes. A welfare reform model implemented by the Secretaría de Asistencia Pública (1937) and its predecessors provided working mothers and families with the latest child-rearing techniques and home economics predicated on foreign material standards at Mother–Infant Centers, community dining halls, foster care agencies, shelters, asylums, clinics, schools, and other social service providers (Sanders 2008). Social workers in charge of these institutions—especially the inspectors who assessed private institutions carrying out social welfare programs—measured policy success by the ability to instill a moral and material adroitness, inspecting everything from linens to cutlery, clothing, and sanitary conditions (Sanders forthcoming, Ch. 2).

The revolution sought to instill a new aesthetic and while many historians have focused on art, especially mural paintings, architectural innovations deserve greater attention because built environments, even those with private, domestic function, occupy public space. As such, they carry strong symbolic value and allowed the revolution to externalize many of its goals at a time when cities were rapidly expanding and abandoning pre-revolutionary aesthetic standards in favor of more utilitarian, modern details that could make evident to a large public the ideals of nationhood under discussion and the manifested economic recovery. Projects in the 1920s built in the "Spanish Colonial" or "California Mission" style, exempted from property taxes under a decree of President Carranza (1917–1920), sought to synchronize the Revolution

with the country's Hispanic heritage and the social solidity under colonial institutions in ways that were not possible under more extravagant art nouveau or art deco styles. Architect Carlos Obregón Santacilia, together with brothers Nicolás and Federico Mariscal, became one of neocolonial architecture's leading advocates, adjusting the quaint tiles, patio fountains, stucco walls, and ironworks to massive government buildings like schools, the ministry of health, and even monuments (Fernández 1997: 90–92). A new generation of architects engaged a wider audience than scant Porfirian design literature such as *El Arte y la Ciencia*: *Revue Mensual de Bellas Artes e Ingeniería* (1899–1911), through new professional magazines such as *El Arquitecto: Revista Mexicana de Arquitectura y Artes Americanas* (1923–1931, 1932–?). Furniture manufacturers gained from the government bureaucratic expansion; Distribuidora Mexicana, S.A., founded by Antonio Ruiz Galindo in 1932, was the country's leading producer of metal and wooden office furniture.

Much attention was given to housing in the years devoted to creating a revolutionary society, especially the homes of urban workers and the rural peasantry. While the housing shortage in rapidly urbanizing and industrializing centers like Mexico City and Veracruz was exasperated by the near-absence of rent controls, it was not until the 1940s that large planned urban housing projects would be constructed. Nevertheless, private businesses such as the Buen Tono Cigarrette Manufacturing Company began to provide workers with healthy and affordable housing in the early 1900s. Such efforts stopped with the revolution, and the rising rate of urbanization drove rents higher while the quality of housing dropped. The 1922 renters' strikes in Veracruz (studied by Andrew G. Wood), Mexico City, and Guadalajara, revealed the possibilities of vocal and well-organized demands to address constitutional guarantees of housing as a basic right (Art. 123, sect. 12), but also prompted the rise of slums. Unable to afford exorbitant rents that swallowed over one third of their salaries, particularly vocal and well-organized workers occasionally received grants of federal and state lands outside the city limits and beyond the reach of public utilities. These unregulated *colonias*, essentially put the problem of infrastructure and housing development on the backs of those least economically equipped to build their own homes, placing them at the mercy of ward "leaders." These cogs in the one-party machinery conditioned *colonia* residents' access to water, sewage, electricity, and pavement, as well as to gifts of corrugated steel sheets and bags of ready-mix concrete, to electoral support. The slums fostered a working class culture that middle class observers labeled as "*naco*," with its own aesthetic and that hybridized in its material culture rural mores with urban consumption patterns and foreign cultural influences via the mass media. Derisively known as *pelados*, *nacos*, and *chúntaros*, they were, as Heather Levi has observed, "simultaneously modern and backward, inauthentic and provincial" (Levi 2001: 345).

Alternatively, the rapidly expanding urban population remained tenants; middle class individuals such as mid-level bureaucrats, managers, professors, journalists, and teachers lacked access to credit to purchase the single-family homes in subdivisions whose high price resulted from their extensive lots and comparatively low occupancy density. In the decades of revolutionary programs, tenants devoted as much as 40 percent of their income to rent. In response to growing agitation, unions worked to make affordable single-family housing available in the late 1930s, and to obtain rent control legislation, finally achieved in 1942 (Olsen 2004: 158–164).

Rural and especially indigenous communities greatly benefitted, at least initially, from the pleasant noises and propaganda of the intellectuals who identified the source among

them of elements of a gendered national authenticity. Major metropolitan papers such as *Excélsior* hosted beauty pageants to crown *La India Bonita* ("the beautiful Indian maiden," implying a beautiful exception to the norm). Winners of these 1920s contests represented a modern, national *mestiza* femininity, which, in the modern household full of gadgets and operating under the latest principles of home economics, reestablished a gender propriety suspended during the Revolution (Macías-González 2009). Motherhood and beauty were similarly celebrated and deployed to re-edify a middle-class, *mestizo* patriarchy, and material culture played an important role. Sponsors of contests and celebrations of physical beauty, moral pulchritude, and idealized motherhood staged these gendered prototypes amid modern appliances, dry goods, and packaged foods. The revolutionary government thus set up as a model for emulation by the entire rural and urban population, both indigenous and Europeanized, a uniquely *mestizo*, middle class, urban feminine mystique that required appropriate apartments and houses, goods, and practices of domesticity.

Despite the material and social improvements of the 1920s, by 1926 the economy began to contract well ahead of the 1929 stock market crash. The downturn began as investors grew weary of the showdown between the Catholic Church and the revolutionary government in 1926–1929. Known as the "Cristiada" or the Cristero War, the conflict stemmed from resistance to government enforcement of anticlerical 1917 constitutional articles that restricted the number of priests and their exercise of political rights, prohibited Church operation of schools, expelled foreign clergy, and seized all Church properties. Conservatives and the Church launched a series of economic boycotts during the summer of 1926 and, by August 1, closed down churches, essentially going on strike against the government. In rural areas, fanatics burned government offices and allegedly crucified schoolteachers (Meyer 1998). Additionally, worker agitation, overproduction, bottlenecks in consumption due to limited absorption capacity of the domestic market, and investors opposition to nationalization of subsoil mineral rights, essentially strangled the economy from 1926 on. By 1932, the economy shrank by one fifth, as the gross domestic product declined 30.9 percent between 1926 and 1932, and unemployment mushroomed by 350 percent. Exports plummeted from 334 million to 97 million pesos in the years 1926 to 1932. The money supply contracted by 60 percent and the Bank of Mexico's reserves shrunk 53 percent; tax revenues declined from 322 to 179 million pesos (Haber 1989: pp. 150–156; Cárdenas 2001; Sanders forthcoming: Ch. 2).

The effects of the economic downturn of 1926–1932 ultimately prompted the government, under President Cárdenas in 1934–1940, to create economic reforms and to begin implementing some of the most radical provisions in the 1917 constitution, primarily in land redistribution and the national ownership of natural resources (see Wakild chapter in this volume). Based on his experience as governor of Michoacán, Cárdenas implemented schemes that carved up large estates and established *ejidos* or communal landholdings; by the end of his term over 45 percent of the country's arable land and over 55 percent of irrigated land was held by these collective farms.

One of the biggest challenges of the Great Depression was how to allay the downturn's pressure on the expanding numbers of urban and repatriated workers. Urban workers, many of them first generation migrants from the countryside, lacked access to the community resources and subsistence agriculture on which the peasantry relied to survive economic downturns. Indeed, the peasantry's economic resilience and large numbers (they made up over half of the country's population) allowed them to cushion the effects

of economic shocks (Haber 1989: 172). The arrival of some 400,000 workers "repatri-ated," that is deported, from the U.S. between 1929 and 1939 exasperated already high unemployment. Relief would finally arrive from government public works projects, improvements to food distribution, and the institution of a network of social services. The diasporas from the countryside to the city and to the U.S. only accelerated in the coming decades of the modernization project. By the 1930s rising material, political, and social expectations (and patterns of consumption) among workers returning from the U.S. or exposed to urban environments were already proving transformative (Balderrama and Rodríguez 2006; Taylor 1933).

A significant part of the recovery under President Cárdenas included the creation of a National Food Agency to guarantee fair prices to producers. More commonly known as CONASUPO (Compañía Nacional de Subsistencias Populares), a name it acquired in 1962, the National Food Agency began in 1937 as the Compañía Exportadora e Importadora Mexicana, with the purpose of stabilizing commodity prices for urban workers and providing markets for growers (Ochoa 2000: 8–9). In order to make com-modities widely available, Cárdenas established the Comité Regulador del Mercado de Subsistencias (CRMS) in 1938 to better combat shortages, higher prices, and labor demands for higher wages. By 1939, CRMS opened up retail shops that sold staples such as sugar, rice, and beans at 50 to 75 percent below market rates.

Coping with the crisis, Cárdenas increased government intervention in the economy. As revenue from oil exports dropped, the government was prompted to make effective a nationalization of subsoil resources that had been already established in the 1917 Constitution. Although the matter would remain contentious until well into the Second World War, Cárdenas nationalized the oil industry in 1938, creating a government oil monopoly, PEMEX. Short term, the country's foreign currency reserves would drop and prompt further devaluations, but with the World War this only made Mexican exports cheaper. The stage was set for rapid development.

Cárdenas as president adopted a foreign policy that identified the Fascist and Nazi threat in Europe and the Americas and worked against it. This became evident during the Spanish Civil War and ultimately resulted in the arrival of 25,000 Spanish Republican immigrants in the late 1930s. They greatly affected the country's material culture, transferring vast social and cultural capital, as well as significant wealth. The many intellectuals, professionals, technical specialists, and skilled workers among them con-stituted a great brain trust whose long-term impact has not been fully appreciated. As professors, directors, bureaucrats, and technical experts, they did much to train future cadres in Mexico. Of the group's scientists, the 43 percent who were physicians immediately expanded the number of doctors (4,200) by almost 10 percent; 27 percent of the exile's scientists were engineers, 9 percent were pharmacists, and 5 percent were chemists and architects (Lida 1988). They included renowned artistic and cultural figures such as film director Luis Buñuel, composer Rodolfo Halffter, and painter Remedios Varo. Philosophers, humanists, and social scientists swelled and renovated the ranks of the Mexican academy, not only bringing the brightest minds of Spain to national institutions like the UNAM and the Instituto Pedagógico Nacional, but found-ing world class institutions like El Colegio de México and the Fondo de Cultura Económica. The arrival in March 1939 of socialist leader Indalecio Prieto, aboard the Spanish Royal Yacht and bearing some $50 million USD in bullion, securities, currency, jewels, and religious ornaments, added economic capital to the exile. Destined to cover the expenses of caring for the Republic's leadership, supporters, and pensioners through

the Junta de Auxilios a los Republicanos Españoles (JARE), much of this capital was invested through the Development Bank, Nacional Financiera. Other sums went to set up workshops, small factories, business ventures, schools, and community institutions. Prieto later transferred to Mexico millions in war material—including much of what would subsequently form the core of the Air Force—purchased in the final months of the Civil War from the U.S. After Franco's triumph and growing factional differences between the Republican exiles in Mexico and France, the Mexican government would eventually seize all of JARE's assets in 1942 (Botella Pastor 2002; Mateos 2005; Herrerín 2007: 9–23).

The War, the Post-War Boom, and Consumption's Golden Age (1940–1970)

The Second World War greatly affected national material culture and consumption, launching what some historians have characterized as "the Mexican Miracle" of rapid import-substitution industrialization, prosperity, and urbanization. Between 1940 and 1970 the population grew from 19.7 to 48.2 million people (INEGI 1996). In the early 1940s, the outlook was not as rosy. The onset of the Second World War brought a scarcity of foodstuffs derived from a re-ordering of agriculture and industry to aid the Allied, especially the U.S., war effort. Land previously devoted to food crops now grew oleaginous seeds and plants from which rubber and lubricants were synthesized and much of the oil and petrochemicals were exported to the U.S. By 1943, in addition to shortages of spare parts, medicines, tires, and heavy machinery, Mexicans faced starvation, prompting food riots that resulted in emergency imports of corn (Niblo 1995: 128–138). The war permanently curbed the influence of France, Great Britain, and Germany. After 1945, U.S. merchandisers, with the assistance of the Office of Inter American Affairs, expanded into Mexico thanks to retail and advertising intelligence that facilitated joint ventures with Mexican investors. Particularly successful were firms like Sears and Roebuck which, from its arrival in Mexico in 1947, sought to Mexicanize the brand and to appeal to the expanding urban middle class (Moreno 2003).

While the U.S. momentarily propped up the economy with silver purchases, these circumstances added impetus to Import Substitution Industrialization (ISI). Under President Manuel Ávila Camacho (1940–1946), creative credit schemes, tax exemptions, subsidies, permits to import machinery, and protective tariffs, together with international loans and opportunities for foreign investment through joint-ventures in which Mexicans nominally held controlling interests, strengthened and expanded industrialization. Taxes were kept to a minimum and were primarily levied on salaried workers, since big business was practically exempt. While the government maintained control of crucial, strategic sectors such as railroads, communications, and energy, private investors capitalized on the government's pro-business shift and maneuvered to benefit from an anticipated postwar boom in consumer spending after years of consumer goods shortages. Among the most successful of these entrepreneurs were members of the Monterrey Group, which included Roberto G. Sada (head of Vidriera Monterrey Glassworks), Luis G. Sada (Cuauhtémoc Brewery), Joel Rocha (owner of Salinas y Rocha furniture factory and small electronics store chain Elektra), Manuel Barragán (soft-drinks magnate and owner of *Excélsior*), and others, who represented the country's most powerful business group. They along with others lobbied the government to keep labor pliant, slowed or ended Cardenista social reforms, and pushed for greater and cheaper sources of energy for their factories,

refineries, and packing plants. State and local governments cut taxes and provided tax exemptions to builders of new hotels, businesses, cinemas, and theaters. Under Ávila Camacho, the government's revenues increased; between 1941 and 1946 $2.5 billion pesos were invested in road construction, irrigation, power plants, and railroads (Niblo 1995: 167–172, 194, 205).

After the Second World War, President Miguel Alemán Valdés (1946–1952) veered sharply towards economic nationalism and set the policy direction of the next quarter century of consumption and production in the nation. He initiated the Campaña de Recuperación Económica, a campaign for economic development that received strong support from the labor leaders of the CTM and the industrialists in CANACINTRA (Cámara Nacional de la Industria de Transformación), a chamber of industry dominated by consumer manufacturers slated to benefit considerably from the proposed industrial protectionism. In return for this protection, Alemán pushed manufacturers to improve the quality of nationally manufactured goods to replace the foreign manufactures flooding into Mexico and eating up postwar reserves (Gauss forthcoming). In 1947, he instituted the first trade controls, suspending the importation of 120 items. He instituted trade quotas with a licensing system, a move that applied to only 1 percent of imports in 1947 but grew to 28 percent in 1956, 65 percent in 1964, and over 70 percent in the 1970s (Esquivel and Márquez 2007: 340–341). Inaugurating his "Hecho en México" ("Made in Mexico") campaign in 1952 and overseeing its expansion, Alemán explicitly linked ISI to the cultural project of *Mexicanidad*, redefining the essence of the national character as "pride in national production and consumption of modern manufactured goods" (Gauss forthcoming). In a decree of October 1952 he mandated that all clothing manufactured for domestic consumption carry a label marked not only with "Hecho en México" but also with the product's region and factory of origin. Tapping into the revolutionary genealogy of *Mexicanidad* and uniting producers and consumers within a revolutionary nationalist project for development, Alemán publicly asserted the claims of the PRI to be leading both the material and moral regeneration of the nation (Gauss forthcoming).

Success came quickly. Alemán had paired the Campaña with an ambitious transportation infrastructure development program, spurring consumption by tens of thousands of worker-consumers employed in these projects but also by those employed in heavy industries providing the domestically produced steel, cement, and other construction materials. Between 1946 and 1950 industry expanded at a rate of 7 percent; between 1940 and the 1960s, the economy expanded at an annual growth rate of between 5 and 7 percent; and manufacturing as a segment of the GNP increased from 17 to 26 percent (Werner 1999: 112–115, 138–139). Businessmen, like real estate developer-turned-office furniture manufacturer Antonio Ruiz Galindo, owner of Distribuidora Mexicana, recognized the opportunities to be gained from the heavy subsidies the state offered employers who made the PRI rhetoric of material and moral regeneration a reality. He secured an annual subsidy of over $1 million dollars, moved his factory north of Mexico City, and built a model industrial city that provided workers with rent-free modern high rise apartments, a movie house, a clinic, organized sports leagues, cafeterias, and attractive dressing rooms, and sanitary facilities. His success likely influenced his appointment under President Alemán to head the Ministry of the Economy (Niblo 2000: 132, 275).

Industrialization increased the number of goods and merchandise, creating opportunities for suppliers but also for retailers, particularly among immigrant communities in

large metropolitan areas. Gradually evolving from small shops in downtown Mexico City, along the old Calle del Correo Mayor, and later peddling door-to-door, the small Jewish immigrant community established cottage industries in the 1930s from which they expanded into light manufactures of buttons, zippers, lace, ribbons, ties, stockings, socks, underwear, and knits, gradually displacing the French from the retail trade, especially in millinery, knits, and haberdasheries (Gojman de Backal 1993 vol. 7: 28–60). This prompted fierce anti-Semitic campaigns in the late 1930s, in part supported by Franco-Mexican shop owners who feared their competition (Salazar 2006: 323–326, 385–402). Other investors and business people produced European and American goods under license for the national market, and the expanding upper middle class eagerly consumed luxury goods. By the 1950s upscale retailing districts outside downtown business districts developed, amid hotels, trendy restaurants, and bars, in Mexico City's posh Colonia Roma and Colonia Juárez residential districts. There, purveyors of haute-couture set up shop next to furriers, jewelers, parfumiers, and scores of beauty salons, attracting "carriage trade" clientele whose preference for the color pink helped rename the area around Niza, Hamburgo, Génova, Amberes, Londres, and Liverpool streets into *la zona rosa* or "pink zone." Among them were DuBarry's, Jacqueline's, and John's Beauty Salons; Ferragamo, Miller, Evins, Joyce, and Andrew Geller's shoes and leather goods; and haute couture could be found at Tao-Itzo, La Jolie Femme, Henri Chatillon, and Pavignani's, Christian Dior's representative in Mexico (Romero 1962: 198–200).

The wartime disruption of global trade created opportunity in the fashion world. Designer Ramón Valdiosera, a native of Veracruz who enjoyed President Alemán's support, launched an ambitious plan in 1949 to create a distinctly Mexican haute couture. Valdiosera unveiled his plan in a radio program over the objections of French fashionista Henri de Chatillon, who claimed Mexico lacked the textile industry to support high quality clothing, and Mexican designer Armando Valdéz Peña (wardrobe consultant to film actress María Félix) who felt that the country lacked the good taste and refinement. Valdiosera drew inspiration from native textiles and colonial era stitching, embroidery, and drawn work (*deshilado* or tatting) and used natural dyes. Over the summer of 1949, the debate between Valdiosera, de Chatillon, and Valdéz Peña continued in the magazine *Nosotros*, and by early 1950, Valdiosera had established a fashion atelier that marketed his fashions as "Maya de México," with photo shoots in archeological zones and fashion shows in colonial buildings. Valdiosera's fashions and textiles, inspired by European haute couture but incorporating Mexican textile techniques and motifs from pre-Columbian cultures, became popular, and received widespread promotion. Fashion shows in New York and in various European locales gave his firm prestige and he attracted a well-heeled clientele. Valdiosera took on important commissions, designing the uniforms of Mexican airline personnel, among others, helping to create and trademark a Mexican "look" and color palette (Mallet 2010; Valdiosera 1992).

Growing mechanization, increased credits to large-scale food production operations, and investment in irrigation projects, combined with new pesticides and fertilizers, created a "Green Revolution." In part financed by the Rockefeller Foundation, improvements in agricultural production created an abundance that improved nutrition and made food cheaper and better quality. Crop yields increased thanks to heavy use of fertilizers, insecticides, and better seeds. Caloric intake per capita increased. This positively impacted health, longevity, and fertility of the population—and put an end to food imports.

The years from 1940 into the 1960s were most generous to the urban middle class, which benefited from rising salaries, and expanded access to better housing and education, all of which provided a higher standard of living. The good life was based on a host of new social programs, primarily the IMSS, ISSSTE, and INFONAVIT, largely developed from the 1925 Directorate of Civil Pensions. The Mexican Institute for Social Security, or IMSS, was founded in 1943 to provide medical care for workers in the private sector, and subsequently expanded to family members. Although it initially functioned as a government subsidized health insurance plan for workers, with private physicians providing health care, over the 1950s it became much more a network of government owned and operated infirmaries, clinics, and highly specialized medical centers equipped with the latest medical technology, such as the Centro Médico Nacional. A marriage benefit provided a bonus of one-month's wages to cover the expenses of creating a new household, such as the acquisition of furnishings, presently eroded to approximately $150 USD. The Institute for State Employees' Social Security and Social Services, or ISSSTE, founded in 1959, served as a model social service provider that coddled the Revolution's favorite children, the federal bureaucracy. In providing cradle-to-grave services to employees in the public sector, ISSSTE gave beneficiaries access to clinics, childcare, schools, elder care, pensions, housing loans, credit, discount retailing, pharmacies, health resorts and spas, as well as cultural and social activities.

Housing represented the largest and most important purchase for consumers. Efforts to provide workers with mortgage financing begun in the late 1920s and early 1930s through the Directorate of Civil Pensions (DPC) and BNHUOP, the Banco Nacional Hipotecario Urbano y de Obras Públicas, benefited few workers. Through the 1940s and early 1950s BNHUOP and DPC collaborated on developing model housing projects, including the "Esperanza" and "Miguel Alemán" housing developments that made 1,200 apartments available to workers. By the mid-1950s, a new housing agency, the National Institute of Housing (INVI or Instituto Nacional de Vivienda) created mechanisms for mortgages and home repair loans (Herrick 2005).

For the upper middle classes and the wealthy, the period witnessed a continuation of the housing patterns developed in the late decades of the Porfiriato, of continuously moving into exclusive subdivisions made up of single-family homes. Bypassing the quasi-aristocratic Colonias Juárez, Cuautémoc, and Roma, clustered along the base of the Paseo de la Reforma, new money spread further into Polanco, Anzures, and Lomas de Chapultepec. A profusion of gardens and parks with beautiful outdoor theaters and paths for exercise attracted professionals to colonias like Condesa, Hipódromo, and Del Valle, although alongside the single-family dwellings, they developed a clear middle class identity that included multi-family luxury apartments complete with underground parking garages and rooftop rooms to house the live-in maid (Tavares López 1999).

The expansion of these subdivisions transformed the commercial geography of urban areas. Suburbanization and new competition eventually compelled old-style French-owned department stores and Spanish grocers to develop new strategies that took "downtown" into neighborhoods through branch stores and supermarkets that required significant capital investment and which provided shoppers with new experiences. Sears Roebuck and Company stands out as the greatest retail innovator in the postwar era and represents the waxing of U.S. influence on Mexican retailing models, consumption, and material culture and the waning of the European. It deftly capitalized on the inter-related phenomena of suburbanization, the aspirational allure of the U.S. middle-class lifestyle and material culture of the postwar period, and the doubling of the middle

class to 25 percent of the population over the course of the 1940s. Inaugurating its first store in Mexico City in 1947 with a blessing from Archbishop Luis María Martínez, the company management expanded rapidly to capture the middle-class shopper with a growth plan based on suburban locations, easy credit, and aggressive pricing and advertising (Moreno 2003: 172–206). The store opened the last of its 55 stores in 1993 and is now owned by billionaire Carlos Slim Helú's Grupo Carso conglomerate. Venerable downtown stores like El Palacio de Hierro and El Puerto de Liverpool (known outside the capital as *Fábricas de Francia*) waited a decade to expand to the suburbs and nationally and never quite relinquished their position as a destination for a more posh clientele. The two companies now operate throughout the Republic 10 and over 50 stores, respectively. Suburbia, another major chain of department stores established in 1970, now operates over 80 branches.

Supermarkets, first introduced in the U.S. in the 1930s, arrived by 1945. They instituted larger, standardized, centrally managed stores with a wider array of goods, high volume sales, lower prices, and clean, well-lit, embellished, orderly interiors. The first chain supermarkets, SUMESA, CEMERCA, and Aurrera, made a splash, transforming what had previously been the task of maids and cooks into opportunities for conspicuous consumption that were not necessarily engendered as female (Matute Aguirre 2001: 170–171). Men could also shop, especially on their way home from work, if the supermarket had ample parking and especially since haggling was not required as all items were clearly marked, labeled, and could be easily located. Following patterns observed elsewhere in the postwar world, the transition from counter-service to self-service retail provided new interactions in supermarkets with space, goods and merchandise, other shoppers, and with supermarket staff. Supermarket spaces were designed and distributed to encourage mobility; one could go up and down the aisles, cruise or meander about the fruits and vegetables, queue in front of the butcher shop and at the checkout counter before heading out to the parking lot. Within these spaces, shoppers could interact with the merchandise, enabling a process of selection that provided one with greater choice and with labels that informed one of nutritional content or whose illustrations provided narratives of fulfillment, exclusivity, and propriety. Interacting with other shoppers enabled one to get to know one's neighbors, offsetting the isolation of the subdivision, but also allowing for the exchange of information, gossip, and opportunities for chance encounters and conversations from which could spring new friendships, acquaintances, and relationships. Taking one's children along also provided opportunities to socialize them or to instill values like frugality and responsibility; or, to perform, reinforce, and explore gendered roles. Interactions with neatly uniformed, well-groomed supermarket staff differentiated the supermarket experience from that of shopping at a traditional market or grocery store. Recognizing familiar faces, learning employees' names, and interacting with them on a regular basis helped customers to identify with the neighborhood supermarket and to assert their membership of a pampered class, where personalized attention such as delivery service and special orders gave them a sense of exclusivity. Neatly packaged, processed, standardized, branded food clearly labeled with nutritional information fulfilled a demand for novelty, quality, and a focus on health while also allowing consumers to use new domestic appliances. The supermarket shopping experience, with its cleanliness, order, and piped-in music distanced shoppers from the unsettling haggling with merchants hawking anonymous, unpackaged, bulk products of unknown precedence, and non-standard appearance sold from the back of a cart or a market stall of dubious hygiene. The weekly one-stop shopping trip also freed up time

and (as Scarpellini outlined in the Italian case) offered a type of integration for newly-arrived peoples into a democratic, homogeneous society open to all (2004, p. 664). Finally, customers who had been fascinated by representations of the "American way of life" in films and magazines may have identified the supermarket as symbolic of continued modernization. The supermarkets accomplished much more than eliminating earlier forms of retailing; they hybridized the personalized attention with opportunities for new experiences and sensations (Scarpellini 2004; Deutsch 2004; Alexander et al. 2009). Icons of modernity though they were, supermarkets were concentrated in more affluent areas, leaving the remainder of manufactured food distribution to small-scale grocers, municipal markets, and street vendors (Rello and Sodi 1989).

Heavily processed snack food and soft drinks also shared shelf space in the supermarket and traditional retail outlets next to staples like Bimbo bread and canned goods by Herdez and Clemente Jacques. Manufacturers and their advertisers pursued a hybridized cultural appeal to Mexican nationalism and alluring U.S. (and therefore modern) cultural forms. In an era of economic nationalism, Pepsi-Cola and Coca-Cola stressed their Mexican ownership and sourcing of ingredients while the Cervecería Cuauhtémoc advertised its brands as international products consumed in the most posh establishments in "ultracivilized" cities like New York (Moreno 2003: 133–134). Packaged snack foods, so ubiquitous in the streets and in the diets of the nation today, generally began with small entrepreneurs. The history of the Sabritas S.A. de C.V. illustrates this evolution. It began in the kitchen of Pedro Marcos Noriega in 1943 where he began frying potato chips, the iconic staple of U.S. snacking, and hiring bicycle vendors to sell them locally. Over the next two decades it expanded its product lines, adopted automatic fryers and improved packaging, moved from street vendors to supermarket shelves, and finally reached a national market when it made an investment and distribution deal with Pepsico Inc. in 1966. The injection of foreign capital allowed the company to open its first large manufacturing facility in 1968 in the capital, followed by a second in Guadalajara where it introduced Doritos, Fritos, and Sabritones to its product line.

The housing programs that INVI, the BNHUOP, and the DPC financed transformed a nation of renters, making homeownership a reality for millions in the middle class. Stylish, modern owner-occupied apartments in grand housing projects, complete with schools, parks, churches, clinics, supermarkets, laundromats, post office, movie house, and bus stops, gradually displaced the single family detached house as the ideal of the middle class. Heavy investment by the BNHUOP and the DPC, made possible projects such as Mario Pani's 13-storied, 1,082 apartment Unidad Habitacional Miguel Alemán. Inspired on the functionalist ideas of French urban planners and architects like Le Corbusier, Pani incorporated light, comfort, and garden spaces into living areas, improving the urban experience and building into the structures practical mixed used spaces in which businesses, leisure spaces, and service areas were within reach. Subsequent developments, such as those of Nonoalco, in the quarter of Tlatelolco, housed upwards of 100,000 individuals and brought a life of comfort and ease to larger numbers.

Working class residents fared less well. While the government did provide low cost housing, often integrated into middle class developments like Nonoalco, industrial workers and other privileged members of the PRI corporate family usually gained access to these units. More likely their experience with the Mexican Miracle emulated that of the family made famous by Oscar Lewis in his ethnography *The Children of Sánchez*, joining the ranks of the underemployed in informal sectors of the economy, affording housing in the slum tenements (*vecindades*) of colonias like Tepito (Lewis 1961). Researching in

1956, Lewis shows that within Tepito the material benefits of the Miracle had trickled into the neighborhood, the goods used manifesting a distinct social hierarchy in what he identifies as a culture of poverty. In the more affluent of the two vecindades he studies, Casa Grande, 79 percent of tenants had radios, 54 percent wrist watches, 55 percent gas stoves, 22 percent electric blenders, and a surprising 21 percent television. In Panaderos, the other tenement, only one household owned a television and only two owned wrist watches (Lewis 1961: xvi–xvii).

Even these established colonias could not house the many new arrivals who established squatter settlements surrounding the city proper. The first settlement, of Ciudad Nezahualcóyotl, began in 1946 on the dry bed of Lake Texcoco, its population reached 2,000 by 1949 and 80,000 by 1960. These marginalized residents at first simply claimed a plot of land and constructed a shelter from whatever material could be acquired. By 1959, a sense of growing community had developed sufficiently to overcome the atomizing tendency of marginal settlements like Neza. A group representing the 33 neighborhoods petitioned for services from the State of Mexico, and in 1963 the State legislature incorporated the sprawl into a city and appointed the first municipal president, greatly helping efforts to gain paving, sewerage, electricity, streetlights, and shopping areas over the next two decades. Today the population is over one million (Gilbert 1989; Lomnitz 1977). Simply put, the government could not provide for, let alone keep up with, the housing needs of a rapidly growing urban population fueled by an influx of rural migrants seeking employment promised by the regime's urban-based industrialization program. The booming factories of Mexico City-dominated CANACINTRA were one such magnet: the capital's contribution to the total production of consumer goods alone grew from 31 percent to 52 percent between 1940 and 1960 (Garza Villareal 1985).

Furnishing these apartments provided a new market for manufacturers, but also challenged them. Traditionally purveyors of overstuffed, ornate, carved furniture copied from eighteenth and nineteenth century European styles, Mexican furniture suppliers were challenged to provide products that adhered to the new aesthetics. Architects worked with Bauhaus designers such as Cuban Clara Porset (1895–1981). To educate consumers about the furnishings appropriate for the modern apartments, architect Mario Pani hired Porset to design cheap modern furniture with which he decorated model apartments. Porset's designs were attractive and offered clean lines and high quality natural finishes, complementing the modern surroundings. Along with Porset, other architects, artists, and manufacturers, such as Ruiz Galindo's Distribuidora Mexicana, organized exhibits of tasteful modern interiors over the late 1940s and early 1950s. One of the most influential exhibits occurred in 1952, at the UNAM and at the galleries of the Bellas Artes Opera House. Titled "Art in daily life," the exhibit included many types of household items, not only furniture. It featured high quality glassware, flatware, cookware, silverware, and textiles, but also items that have since become iconic of Mexican households, such as the fuel and time efficient pressure cooker (Mexico 1952; Museo Franz Mayer 2006). Alongside Porset's beautiful designs appeared the latest generation of washing machines, stoves, and refrigerators, all of which had begun to appear in households in significant numbers only within that generation, thanks to the industrial firms Mabe and Ruiz Galindo, forever displacing the launderess, the charcoal stove, and the icebox. The government provided incentives for consumption, providing a month's wages to newlyweds through the IMSS as well as credit mechanisms that fueled the growth of the furniture industry.

The government's efforts to build middle-class utopias became evident in projects to develop U.S.-style subdivisions like Ciudad Satélite, the development of beach resorts like Acapulco, and the construction of the UNAM campus. Ciudad Satélite, planned as a commuter bedroom community for Mexico City, mushroomed and, by the 1960s, housed shopping centers and one of the nation's first malls (anchored by department store El Puerto de Veracruz), Plaza Satélite. As development expanded, the adjacent farmlands disappeared, prompting the creation of an ecological reserve, Naucalli Park, to preserve the green areas that had originally prompted the subdivision's development. Many government officials, among them cabinet members and ex-presidents, purchased large lots in the area, adding to its attraction.

Tourist destinations like Acapulco, and to a lesser degree Veracruz, received heavy investment under President Alemán (1946–1952), who used the project for personal profit. Building on Acapulco's following among jet setters who more often than not arrived aboard yachts, Alemán and the country's developing tourism industry expanded roadways linking the coastal resort to Mexico City and improved the air service, making it possible for large numbers of domestic and foreign tourists to enjoy the high-rise chain hotels, nightclubs, and other attractions. Acapulco's marketing in the 1940s signaled a dramatic departure from Mexico's branding of itself as a quaint, primitive locale, signaling a change toward the hyping of romantic, sensual escapades on the beach and in the privacy of a luxury hotel with all the modern amenities (Saragoza 2001: 91–115; Sherman 2000: 585–586; Sackett 2010). Finally, the Ciudad Universitaria, located on a 730 hectare campus on Mexico City's southern outskirts, enabled the construction of vast, world-class research facilities and the expansion of the University into a veritable greenhouse of scientists, technicians, physicians, engineers, lawyers, and economists that the country needed to maintain and oversee its rapid development. The transfer of the University to the city's outskirts made available downtown classrooms, student housing, and cafés for retail stores and offices. Vast improvements in transportation—nearly 20,000 miles of highways, new airports, and an expanding intercity passenger bus service to supplement the old railways—also accompanied the utopian developments that would later be complemented by subway systems, but also, by the rapidly expanding auto industry.

The auto industry developed to supply growing domestic demand, particularly from the expanding middle class. Although a number of workshops experimented with automobiles in the final decade of the Porfiriato, the incipient industry disappeared during the Revolution. Foreign-owned automotive assembly plants opened in the 1920s, with Detroit brands dominating the market. Volkswagen and Renault appeared in the 1950s, followed by Datsun (Nissan) in the 1960s (Martínez del Río 1972). By 1961, automobile production reached 60,000 annual units, but automobiles and spare parts were over 10 percent of the country's imports. The size of the national market restricted the selection of automobile makes and models. Among the most popular models was the 44 hp Volkswagen Beetle, produced in Puebla from 1954 until 2003, and Ford and Chevrolet pickups, which in rural areas hauled families, livestock, and freight. Also popular were the Renault 4, a clunky but hardy vehicle built with DINA (Diesel Nacional, a state-owned automotive enterprise created in 1951) and the 59 hp Renault 5, built after 1972. Various joint ventures were developed between government-owned enterprises in the 1960s and 1970s, such as VAM (Vehículos Automotores Mexicanos), helping push annual production by 1970 of over 160,000 units. The automotive industry developed largely to comply with legal requirements that vehicles assembled and sold

in the country had to have a percentage of Mexican-built components. By the 1940s and 1950s, this prompted companies such as Industria Automotriz, S.A. de C.V. to produce rims, and later, rigs and trailers (Lifschitz 1985), and by the 1960s and 1970s domestic companies produced brake systems, chassis, engines, and gradually, buses and utility vehicles. In the 1970s, automobile production became Mexico's largest manufacturing industry. Car ownership and the credit terms to finance their acquisition were limited, but did not preclude automobiles from becoming markers of upward mobility. Along the U.S.–Mexico border a gray market developed bringing cheaper used (and stolen) American automobiles for those members of the middle and working class who were able to build up savings to acquire the vehicle and pay the bribes to operate it illegally in the country.

The auto industry also helped to create a labor aristocracy, one whose members defined themselves against their class brethren by the new patterns of middle class consumption they adopted. Steven Bachelor's work on autoworkers at General Motors in the 1950s and 1960s analyzes this privileged labor group and how it Mexicanized and contested U.S. corporate initiatives to craft a transnational work force imagined as a prosperous, reliable, loyal, and Americanized (2001). One such worker, Lorenzo Ramírez, had migrated to Mexico City from the rural Puebla. He, like many other rural Mexicans, followed family and other village members to the cities, part of a chain migration that was transforming urban and rural society. He landed the job in 1963 through his brother-in-law, one of the hundreds of workers hired by GM to implement a government-mandated dramatically expanded domestic automobile manufacturing industry. Multinationals paid well. As an unskilled entry-level assistant he earned a salary of 60 pesos a day, four times what he earned working for the Mexico City government. Unlike most working people, GM employees had the means and the desire to afford products and patterns of consumption from the United States. Indicative of the workers' embrace of certain American material cultural forms were their independent efforts to construct a *colonia* of "single-family, unattached homes on large lots, complete with front and back yards, two-car garages, and neighborhood greenbelts" that bordered the model middle class Ciudad Satélite. Further indicating the attainment of the Mexican-American Dream, workers could enjoy amenities such as a U.S.-style supermarket, along with franchises of Pizza Hut, Shakey's Denny's, Tastee Freez, and Kentucky Fried Chicken (Bachelor 2001: 311). Far from hapless victims of U.S. cultural imperialism, these workers also retained and renewed local identities by establishing clubs, sharing local food and drink, and making periodic trips home. Appropriating national and transnational cultural forms served as a bridge to the modern for many rural migrants.

Rapid urbanization and chain migration from rural areas, as typified by Lorenzo Ramírez, created some fascinating scenarios in which the newly-arrived both adopted the material culture of the city, while holding on to traditional practices. Families from indigenous areas of Tlaxcala, Puebla, Michoacán, and Oaxaca in Guadalajara, Mexico City, and Monterrey relied on family members, friends, and neighbors, for example, both to provide the labor required for communal festivities like patron saints' holidays and regional festivals like the *Guelaguetza*. Their transference of systems of reciprocal exchange to their new urban neighborhoods enabled them to continue traditional observations, but also allowed them to finance consumption patterns that they gradually adopted from urban *mestizos* and whites, such as coming out parties for 15-year-olds (*quinceañeras*), in which family and friends shouldered the expense of hiring party halls, preparing food, purchasing costly costumes, and hiring bands. Similar strategies

were also used to transfer much-needed resources to their communities of origin, enabling the indigenous to finance repairs to village churches, to build schools, and to establish small development organizations (Robichaux 2005, pp. 439–509; Lomnitz 1977).

State visits by foreign dignitaries in the 1960s, as well as hosting the 1968 Olympiad, displayed the triumph of the Mexican Miracle before the international community. The visits of John F. Kennedy (1962) and Charles de Gaulle (1964) were not just photo opportunities, but served to announce important trade agreements, investments, and the development of scientific and technical cooperation. The visits exemplified President Adolfo López Mateos's (1958–1964) campaign to elevate Mexico's standing abroad and to secure the XIX Olympiad for Mexico. While historians have seen the elevated costs of hosting the Olympics as a catalyst for student protests, the XIX Olympiad was done on the cheap, costing less than $200 million USD, and the private sector contributed significant portions of the bill. Radio and television mogul Emilio Azcárraga, for example, paid for the construction of the Olympic Stadium at the UNAM. Indeed, President Gustavo Díaz Ordaz (1964–1970) so undercut the Mexican Olympic Committee's efforts that well up until the lighting of the Olympic Cauldron in the opening ceremonies rumors circulated questioning Mexico's preparedness and ability to fulfill its obligations. Lacking sufficient government support, the committee organized a confidence-boosting Cultural Olympiad asserting Mexico's international status, made efforts to brand and market the event, and displayed the appropriate cultural heritage, including the incorporation of modern women as positive images of national modernity(Zolov 2004). A can-do attitude, vastly scaled-back public works, and a bloody crackdown on the student movement allowed the games to go ahead on schedule, even if some projects, such as the subway system, opened a full year behind schedule.

Much of the success of the regime's national development program may be attributed to a shared sense of imagined community developed by the mass media and the mass culture it promoted and shaped. This was Mexico's Golden Age of radio and television, of film, of consumption, of cultural production (See Pérez Montfort chapter this volume). Experiments with the radio began in 1900–1901 (primarily with radio-telegraphy), with some of the wealthy purchasing early radios in the final decade of the Porfiriato. And, while revolutionary factions used "the wireless" to communicate, it was not until September and October 1921 that the first civilian radio broadcasts began with the work of Adolfo Enrique Gómez Fernández and Constantino de Tárnava, in Mexico City and Monterrey, respectively. Gómez and his brother, with financial backing of businessman Francisco Vilela, broadcast the first radio program, imitating the vaudeville shows known as "*carpas*," with amateurs and artists singing, reciting poetry, performing sketches, and interpreting musical numbers (Gonzalbo Aizpuru 2006, vol. V: t. 1, 127–146). Concurrently, the federal government organized radio demonstrations and broadcasts at a commercial exhibition that commemorated the 1921 centennial of independence, giving an opportunity to the masses to observe "Marconi's magic box." Over 1922, the National Radio League established a network of radio stations around the country; large urban areas like Monterrey, Guadalajara, and Mexico City adopted radio formats featuring both live and recorded performances, transforming early radio stations into talent powerhouses that sidestepped the stage as a generator of new artists (Hayes 2000). These early stations depended heavily on advertisers, on promotions, and contests (with radios as prizes frequently), and important

cultural figures, like Salvador Novo, helped to craft catchy jingles between variety shows, comedies, dramas (soap operas), and talk shows.

By the mid 1920s, the radio became an important household appliance, often encased in imposing, ostentatious cabinets that fitted in well with the furnishings, mementos, and family portraits of the sala or living room. With models costing from 13 to 800 pesos (at a time when workers earned from 2 to 4 pesos daily), even working class individuals could purchase radios, with inhabitants of tenement housing frequently crowding into the first unit that was able to afford the novelty, paying a few centavos for the right to listen. From 25,000 radios in 1925, numbers increased to 100,000 in 1930, 250,000 in 1935, 450,000 in 1940, 1 million in 1945, and 2 million in 1950. In Mexico City, the first two radio stations, CYB (which went on to become XEB, "la B Grande") and CYL (which went on to become XEW), were created by merchandising innovator El Buen Tono Cigarrette Co. (which had a tradition for embracing technological innovations) and by a leading newspaper, *El Universal Ilustrado*, in partnership with a radio distributor owned by Emilio Azcárraga Vidaurreta. While both were popular, CYL went on to become the most successful, establishing a large market share, morphing into XEW in 1930 (Hayes 2000). XEW, first through radio (and later through film and television) became an important player in the generation of a mass media-based cultural nationalism rooted in Mexican types, such as the anthropomorphic animal characters of Gabilondo Soler's (aka "Cri Cri) fables, the "*pelado*" working class stereotype Mario Moreno "Cantinflas" protagonized on screen, and gendered roles such as the matron exemplified by Sarah García, "the grandmother of Mexico" (Miller 1998; Ford 2008). Recognizing its propaganda value, the National Revolutionary Party established a national radio XE-PNR (later XEFO), giving the state a presence in the national and international market, until it was privatized in 1946. Subsequent government radio experiments included the creation, in 1936, of "La Hora Nacional" a national weekly radio program broadcast on all stations that highlighted regional cultural forms and sought to weave them into a national cultural tapestry. The most important educational broadcasts came from XFX, the Education Ministry's station, which broadcast language, social studies, and health classes for children in the daytime and artistic, literary, and musical programs in the evening.

Experiments with television (known as *telectroescopía* at first) began in 1931—and Mexicans rightly claim the important technological innovations of Guillermo González Camarena, who patented the trichromatic field sequential system color television in 1940—but the first public broadcasts did not begin until the 1950s. Much of the delay was due to the Second World War, but also to indecision over whether to follow the U.S. private enterprise model or a European non-profit, state-run model for the new industry. Presidents Ávila Camacho and Alemán hesitated over the potential power that a single television monopoly could wield, largely based on the great power of radio entrepreneur Emilio Azcárraga Vidaurreta. Alemán commissioned Salvador Novo and television pioneer González Camarena to study the American and British models, deciding on the for-profit model; fearful of the potential political power of Azcárraga's media empire, however, Alemán favored others. Rómulo O'Farril, a crony of Alemán, began to operate the first station, Channel 4, in 1950, broadcasting two hours daily that featured classical music, opera, women's advice shows, and news broadcasts. In 1951, Azcárraga followed suit, operating Channel 2, using to his advantage the actors he had developed for his radio and film programs. A third Mexico City station, Channel 5, under González Camarena, went into operation in 1952. By 1955, the three competing stations merged into

Telesistema Mexicano, the forerunner of today's Televisa conglomerate, developing a network of repeater stations around central Mexico that took television to over 2 million households by 1963 (Mejía Barquera 1989; Fernández and Paxman 2000). Television developed quickly in the north at roughly the same time as Mexico City; XEJ, Channel 5 in Ciudad Juárez, began broadcasts in 1954 and its variety show, "*Noches Rancheras*," launched many local talents, among them Germán Valdés, Tin Tán. While the earliest television sets were imported or assembled in Mexico from imported components, by 1965 the first Mexican-made color television sets—designed by González Camarena, along with his innovative "remote control"—became available on the market (Torres Pimentel 2006). During its initial two decades, much of television programming repeated the successful formats first developed for radio, such as musical variety shows, sports matches, comedy, soap operas, and news programs. Educational and children's programming lacked in quality, but national advertisements and the material culture of soap operas went a long way towards informing and cultivating standards of taste across the country.

For all of the successes of industrialization and the rising standard of living in the cities of the center, a scarcity of consumer goods persisted along the northern border. The rise of Chihuahuan—and particularly Ciudad Juárez—entrepreneurial elites into national prominence, allowed the central government to gain insight into the everyday life of *fronterizos*. This, the need for foreign currency, and an effort to present a modern face of Mexico to the United States, resulted in the plan of President Adolfo López Mateos (1958–1964) to make the border into a 1,600-mile long "show window" through the emergence of the Programa Nacional de las Fronteras (PRONAF), created in 1961 (Ward 2009). Echoing a popular Porfirian border-development scheme known as the "Zona Libre," PRONAF created cultural centers, exhibit and conference facilities, and retail spaces whose purpose was to promote and market manufactures that could substitute for costly U.S. imports in the border regions, ostensibly nationalizing consumers. It provided subsidies to manufacturers who participated. Significantly, PRONAF also sought to promote the border as a tourist destination for North American and Mexican consumers by re-branding the region's reputation for gambling and vice to one of ultra-modern shopping and cultural experiences. Former PEMEX president and Chihuahua native Antonio Bermúdez headed the program. He hired modernist architects like Mario Pani to design a tourist infrastructure, undertaking beautification and construction projects that included upscale hotels, international shopping centers, markets, convention centers, museums, fountains, monuments, and other attractions. Most comprehensive of these tourist cultural zones is the Zona Pronaf in Ciudad Juárez that contains all of the program's beautification components and continues today as a crucial business zone. By the mid-1970s, PRONAF had clearly fallen short of its goal. Of the numerous reasons for this outcome, the most salient is the government's response to the end of the Bracero Program in 1964 and the question of employing thousands of returning *braceros*. The government created the Border Industrialization Program or PIF (Programa de Industrialización de Fronteras), giving rise to twin plant or *maquiladora* industry. These assembly plants provided cheap labor to U.S. and later other foreign manufacturers, who imported components for assembly in Mexico, paying import taxes only on the value added. *Maquiladoras* proved a mix blessing, drawing millions of migrants to border cities that lacked the infrastructure to provide for them. Industrialization of the urban border landscape only added to the region's rough image and worked at cross-purposes to PRONAF. In the end, dueling government development policies routed the

border's economic future towards a path of reliance upon "the production of consumer goods, rather than the consumption of consumer services" (Ward 2009: 204). For many Mexicans in the coming decades, the fate of the border region became a national one.

Stagnation, Economic Crisis, and NAFTA (1970–Present)

Consumers have not fared well since the 1970s. Disparities of wealth, already considerable during the boom years of the Mexican Miracle, accelerated rapidly during the economic crisis of the 1980s and the neoliberalist structural changes in the economy that followed. Completely discredited after the 1968 Tlatelolco massacre, and furthered despised for its actions in the 1971 Corpus Christi Massacre and the 1985 earthquake in Mexico City, the PRI and its political fortunes crumbled in lockstep with its economic policies (See Camp chapter this volume). Lacking legitimacy, the PRI maintained political control through blatant corruption and payoffs to individuals and groups. An important component of the nation's material culture during this period was the low-quality election swag handed out by the PRI in campaign rallies held in impoverished urban and rural areas communities. Cheap t-shirts and plastic goods like toys, washbasins, and shopping bags imprinted with the PRI logo were cynical statements of the party's valuation of the purchase price of a vote. They also mirrored the inundation of domestic and imported plastic and other cheap goods that transformed the composition of wares found in markets and street vendor stalls and blankets. With the presidential election in 2000 by the center-right National Action Party (PAN) candidate Vicente Fox Quesada (2000–2006) the PRI lost its 71-year grip on national political power. The momentous event marked nearly a decade of transition toward a true multiparty democracy, but also nearly two decades of economic liberalization, privatization, and free trade that had arguably saved the economy but had also impoverished many. Years of rampant inflation, peso devaluations, and stagnant wages slashed the purchasing power of present-day worker salaries to approximately 50 percent of those in 1970. At the same time, a wholesale privatization of public assets created plutocrats like Carlos Slim Helú, who began his ascent with the purchase of the national telephone company, Telmex, to become the richest man in the world as of 2010 with net worth of $53.5 billion. Nevertheless, Mexicans have responded with typical creativity, risk-taking, doggedness, good humor, and pooling of family and community resources. Families have acquired the material goods necessary for their biological, social, and cultural survival through means such as the informal market and remittances from the U.S. The question remains, with the end of the economic and cultural nationalism of PRI, whether a national culture and sense of national identity so carefully crafted by the PRI regime can survive the onslaught of global economic forces and a global commodity culture. Or, more specifically, can a sense of *Mexicanidad* survive being so tightly integrated into the economic and cultural orbit of the U.S.

Some consumers fared better than others, and urban middle classes did well in the 1970s despite worrying economic and political indications that the Miracle was over. These privileged groups specifically benefited from the government's growing participation in the economy, as the government of Luis Echeverría Álvarez (1970–1976) bought them off as it stepped up persecution of political dissidents, indigenous people, and the urban and rural poor. Among other pro-consumer acts, Echeverría authorized a 33 percent wage increase for urban workers and price controls to counteract an 11 percent annual inflation rate that hit 40 percent in 1974. In 1972 he established

INFONAVIT (The Institute of the National Housing Development Fund for Private Sector Workers or Instituto del Fondo Nacional de la Vivienda para los Trabajadores) that provided below-market credit for the purchase of apartments, condos, and houses. Modern consumer protection began in on February 5 1976 with the passage of a federal consumer protection law establishing PROFECO (Procuraduría Federal del Consumidor). Charged with consumer education, price comparisons, and arbitration or prosecution of violations of new consumer rights by manufacturers and service providers, PROFECO has functioned to the present day as a reasonably effective agency for consumers.

Serendipitously, in the same year, the discovery of a massive oil field in the Gulf by a fisherman named Rudesindo Cantarell would ultimately have devastating consequences for the nation's economy and consumers. Estimates of the Cantarell field's 50 billion barrels in proven reserves shocked the industry and delighted the government who borrowed heavily against this collateral. The oil fields served as the proverbial hair of the dog tonic to the hangover setting in from the Miracle, and in the coming years the government of José López Portillo (1976–1982) oversaw a national bender of epic proportions. Reckless government spending ensued. The national debt, already risen from $6 billion to $20 billion under Echeverría, rose to $80 billion. López Portillo continued his predecessor's embrace of heightened economic nationalism to counter the PRI's lack of political legitimacy. The percentage of the workforce who were government employees rose from 14 percent in 1975 to 22 percent in 1985 as the president authorized the nationalization of dozens of businesses (grocery stores, bottling plants, shampoo factories, and even hotels) and invested heavily in new oil production and refining capacity (Reavis 1990: 133–134). Record high oil prices and expectations of their continuance fed an orgy of consumer spending on imported goods (despite trade controls), shopping vacations to the U.S., and a host of other expenditures. Nearly everyone seemed to benefit. Government employees received generous raises and the level of corruption reached dizzying levels, especially in the petroleum sector. Too much money chasing too few goods led to disconcertingly high inflation levels of 60 percent to 150 percent. The government sought to dampen prices with a 15 percent retail tax to no avail. With economic growth rates of over 7 percent annually the Pollyannas carried the mood of the nation. López Portillo spoke of the nation's biggest problem being "how to manage the prosperity."

Crisis hit in 1981. Oil prices plunged that year and the expected revenues from oil slipped from $20 to $12 billion, forcing the government to borrow more—and to print more currency. This led to inflation of over 50 percent, and by February 1982, to an end of government maintenance of high exchange rates for Mexican currency. Overnight, currency lost almost half of its value, and massive capital flight began, as the wealthy moved to stash their nest eggs abroad, to the tune of over $50 billion. As workers' salaries were destroyed by the inflation, they clamored for relief, and López Portillo offered pay raises and instituted price controls. Private entrepreneurs responded by pulling goods off the market. By late July and August, transactions in dollars at Mexican banks were made illegal and the government seized all dollar accounts in a mad dash to gain access to hard currency, but this worsened the situation and sped up the capital flight. In an effort to stave off total collapse, López Portillo nationalized the banks in September 1982, and made arrangements to suspend payments on the foreign debt until 1983. Over 1982–1983, the peso lost most of its value, and with it, the Mexican miracle became a nightmare.

Informal markets, always an important element of the economy, had expanded dramatically during the mid-1970s as entrepreneurs sought to answer the demands of consumers in the face of inflation and scarcity. This informal economy grabbed an ever-larger share of the consumer market as vendors sold an overwhelming flood of cheap plastic and knock-off goods, factory remainders of brand name products, and enormous numbers of pirated music, videos, and other products that today analysts estimate to be worth $1 billion. Tepito, the infamous Mexico City *barrio* historically known for its Thieves' Market, Cantinflas, boxers like José "Huitlacoche" Medel, and as subject for Oscar Lewis' *Children of Sánchez*, holds the key to how many middle class *capitalinos* could afford imported goods in an era of high inflation and import controls. Tepito was and is such a force in the Republic that it sets the price of a number of consumer goods nationally. Historically a combination black market and thrift store where vendors sold *cháharas* (junk) and artisans repaired and refurbished clothing and appliances for resale, Tepito's social fabric and cultural identity transformed rapidly after the 1970s when some of its vendors started selling *fayuca*, illegally imported merchandise officially subject to government controls. What started as a trickle in the mid-1970s became a flood by the early 1980s as everything from stereos, televisions, and calculators to blouses, blue jeans, and blenders found a ready market among consumers from the posh neighborhoods of the capital. The PRI permitted the trade because the *fayuqueros* achieved two goals: first, they satiated the cravings of the middle classes for goods from which they constructed their modern identities; and second, they helped dampen inflation by selling at prices far lower than legal stores. In this way, the PRI could retain its nationalist credentials while delivering the goods of modern life to some of its most important constituents: the urban middling classes. *Fayuca* delivered faster and far greater profits than traditional trades. *Fayuqueros* would travel to the U.S. and transport the goods to Tepito for sale. Profits supported impressive displays of conspicuous consumption among these nouveau riche, with travel to beach resorts, expensive women, top-shelf liquor, big jewelry, and big cars topping the list of favored expenditures. Naco "bling" became king. Popular wisdom holds that Carmen Román, the subsequently-estranged wife of President López Portillo, was perhaps the greatest *fayuquera*. The famed work ethic and creativity of the *barrio*'s entrepreneurs and craftsmen disappeared with the easy money. When the government entered GATT in 1986 and NAFTA in 1994 the *fayuca* bonanza had run its course. The lowered or eliminated tariffs dropped the price differential between Tepito and legitimate retailers like Sanborns or Club Aurrera. As a result, consumers of the respectable sort deserted Tepito for more desirable retailing spaces with the safety of receipts and goods with the guarantee of authencity. *Fayuqueros* transitioned into either cocaine dealers or *salderos* (remainder sellers). The old sense of community is gone. Now the detritus of global consumer production is for sale, whether toys from an expired McDonald's promotion, irregular shirts from a factory under contract with Calvin Klein, or fake-brand runners with names like "Reetok" (Esteva 1991; Quinones 2001: 233–248).

Shortages were particularly acute in the north, a region chronically overlooked by a highly centralized economy and distribution system. Three factors exacerbated shortages: price controls; diversion of foodstuffs for sale abroad to raise foreign currency reserves; and rapid population increases due to border industrialization. Echeverría's government greatly expanded CONASUPO to sell subsidized foodstuffs to the rural poor, but his administration also established a basket of basic goods, the *canasta básica*, to subsidize food and other products for urbanites. Storeowners were required to post

large posters listing the official prices of goods such as rice, beans, flour, oil, certain bakery items like *bolillo* rolls, toothpaste, chicken, and some cuts of beef and pork. Stores could sell other products at market prices. Consumers would often find a small amount of fatty, gristly, suspiciously-colored subsidized ground beef next to beautiful cuts of unsubsidized *carne de res*, or bakers would enlarge the size of their *bolillos* to exempt them from the subsidized price restraints. As the López Portillo government tightened price controls as inflation soared, retailers, distributors, and manufacturers responded by creating artificial scarcity, preferring to store goods and foodstuffs in warehouses rather than lose profit. Many remember the shortages of toothpaste, but resent most the indignity of consuming rationed low-grade sugar and going without Coca-Cola, because refined sugar was exported in order to obtain foreign currency as investors dumped their pesos and hoarded dollars as the crisis hit.

Population increases worsened the situation in the north, as cities such as Ciudad Juárez ballooned from 400,000 residents in 1970 to over 700,000 a decade later. Blame falls to Echeverría, who redoubled the efforts of the Border Industrialization Program that led to the consequent rapid urbanization and the inability of the nation's distribution system to feed, clothe, and provision the region properly. While many northerners would shop in the U.S. to acquire goods unavailable at home, the devaluation of the peso in 1982 made the cost prohibitive for most—and a government imposed maximum limit of USD$30 on daily imports limited shopping abroad to necessities. Small entrepreneurs, particularly "acculturated" Indians, responded to this demand. *Norteños* recall how these indigenous entrepreneurs would arrive in shopping center parking lots in trucks piled with textiles from mills in Puebla. One vendor, dressed as a *norteño* but speaking with a Poblano accent, barked out prices like an auctioneer for consumers eager for goods priced to sell. This creative popular response to a government-generated crisis of consumption and distribution highlighted yet again to the failure of the economic micromanagement at the heart of the PRI's development policy.

Miguel de la Madrid Hurtado (1982–1988) and Carlos Salinas de Gortari (1988–1994) presided during *la crisis* (the crisis) and embarked on a radical restructuring of the economy. Both technocrats, both trained in the U.S., both embraced the economic model of neoliberalism ascendant in global financial and political halls of power after the Reagan and Thatcher revolutions. In contrast to the economic nationalism and statist industrialism of the past decades, de la Madrid put faith in free enterprise to solve problems, decentralized the economy and administration (which had been centered in Mexico City), and loosened government regulations to encourage more foreign investment and development. The IMF (International Monetary Fund) bailout package that the government accepted in 1982 came with an austerity program that embodied neoliberalist principles. Among others, it required de la Madrid to institute wage controls and cut government spending, cut subsidies for food, goods, and services provided by government agencies like CONASUPO, and open markets by seeking encouraging foreign investment and membership in the GATT. Finally, the IMF required the dismantling of the state-owned industries. In doing so, de la Madrid began the privatization of much of the country's wealth into the hands of the wealthy and foreign investors and set a trend that culminated in the creation of vast and powerful monopolies under the presidency of Salinas. Austerity measures and budget cuts became the rule but could not control runaway inflation that reached well over 150 percent by the end of his term in office. Salinas accelerated the privatization and neoliberal policies, restoring the country's economy, but practically dismantling the

state's social programs. He renegotiated the foreign debt and stabilized the currency exchange, although, by the close of his presidency, the peso lost half of its purchasing power. In an effort to counter criticisms, he built the Solidarity Program (PRONASOL) to address gross inequalities and help the poorest indigenous, rural, and urban squatter communities.

Solidarity eschewed heavy state intervention and instead sought to make government social spending more cost-effective by pairing government grants to projects developed by local community groups. This strategy embodied neoliberal government social policy, harnessing targeted government spending and economic growth for social equity. The results were impressive: 80,000 new classrooms; 300 new hospitals, 4,000 health centers, and 1,000 rural medical units; piped water access for 16 million people; and materials to build 200,000 new homes and repair 500,000 more. Solidarity also established low-income credit unions and provided funds for 125,000 miles of roads and more than 100,000 kilometers of paved roads (Merrill and Miró 1996). Critics contended that Solidarity did little to address the root causes of poverty and noted that it quickly transformed into an electioneering, vote-buying scheme meant to stave off the regime's end. In social and economic terms the Salinas administration ended poorly, marred by yet another controversial peso devaluation, mounting drug violence, increased emigration to the U.S., and rising marginalization of the poor, who suffered a 40 percent rate of malnutrition. His successor, Ernesto Zedillo Ponce de León (1994–2000), began his term with the enactment of the North American Free Trade Agreement (NAFTA), continuing the policies of opening the economy that have shown no sign of reversal during the presidencies of Vicente Fox Quesada (2000–2006) and Felipe de Jesús Calderón (2006–present).

Free trade and the welcoming of foreign investment transformed the urban consumer landscape by dropping prices, expanding the range of goods, and introducing the new retail innovations already sweeping through Western Europe and the U.S. Among the most important retail innovations since the 1970s is the hypermarket. In enormous buildings, typically 150,000 to over 200,000 square feet, they combine a supermarket and department store whose high volume and slim profit margin business model has proved extremely popular among urban consumers attracted by their low prices and nearly unbelievable abundance of domestic and imported goods. This potent combination appealed to consumers reeling from declining purchasing power during the 1970s through the early 1990s. Much like department stores in the Porfiriato or supermarkets in the postwar boom, hypermarkets reflected the era's notions of modernity, progress, and abundance. The latest retail iteration of constantly moving definitions of modernity, hypermarkets acted as potent representations of the neoliberalist economic model, bringing to consumers the material abundance promised by an ideology of free trade, deregulation, and the message that the unfettered pursuit of private gain delivers the greatest common good. The format, developed by Meijer in the U.S. (1962) and Carrefour in France (1963), took off in Mexico during the Salinas presidency. Major foreign companies like Carrefour and WalMart (Wal-Mart de México) entered the sector early and gained a considerable market share, yet domestic firms evolved and proved strong innovators and competitors. Chedraui, today the fourth largest retailer, opened its first supermarket in 1971 in Jalapa, Veracruz (where its headquarters remain) but transformed itself in the new environment and bought out Carrefour in 2005. Mexico City-based Comercial Mexicana, and Monterrey-based (but Torreón-originated) Soriana, are the third- and second-largest retailers respectively in the Republic following only Wal-Mart

de México, which runs 1,400 retail outlets and restaurants making it the largest private sector employer. Wal-Mart de México (31 percent owned by WalMart) began trading on the Mexican stock market in 1977 and has bought up famous Mexican retail icons like the supermarket chain Aurrera (established in Mexico City, 1970) and Suburbia, a chain of 80 discount department stores established in 1970 that have undercut Sears in much in the same way Sears once undercut its French competitors like Palacio de Hierro and Puerto de Liverpool. Club warehouses are another retailing innovation embraced by Mexicans since their introduction in the 1990s. The two largest are Sam's Club, operated by Wal-Mart de México (68 clubs), and Costco, co-owned by Costco and Comercial Mexicana (32 clubs). Just like the French department store owners of the Porfiriato and so many other retail innovators in the nation's history, foreign companies that have succeeded today do so by adopting and catering to Mexican retail traditions, cultural forms, and tastes, even as they modify the host society's patterns of consumption (Bunker 2010; Moreno 2003).

The availability of consumer credit remains restricted and its costs high compared to the U.S., yet it has increased considerably over the past 15 years. International credit card companies like VISA, Mastercard, and American Express (began co-branding with BANAMEX in 1992) have aggressively entered the market. Club warehouses, hypermarkets, and larger retail stores like Sanborns also market their own credit cards. The giant of the store credit field is Grupo Elektra, a financial service company that essentially sells goods through its discount electronics retail stores (Elektra) to drive its core business. Chaired by Ricardo Salinas Pliego (Mexico's second richest man valued at $10.1 billion), Grupo Elektra embodies the abusive practices of the consumer credit industry nationwide, such as charging interest on the full amount borrowed throughout the life of the loan. Although a December 13 2007 *Business Week* article voiced popular criticism of the company for its high rates and fees charged for consumer credit and microcredit, lax federal laws and oversight pertaining to interest rates and consumer borrowing protections (despite PROFECO) have kept credit costs so high that for all but the comfortable and the desperate cash remains the preferred method of payment for consumers.

Hypermarkets, club warehouses, other discount retailers, and greater consumer credit all reflect a larger shift in the national social contract with the ascent of neoliberal economics. They embody a discursive shift since the 1970s as a citizen's identity as a consumer takes precedence over that of a worker. Now economists respond to concerns of stagnant or even declining wages for workers and growing inequalities of wealth distribution with the argument that these concerns are moot as consumers have enjoyed lower prices and a greater selection of goods. The vision of consumer abundance renders the need for wage increases and ethical questions unnecessary.

Tourism developed its modern scope and character during this era, opening new borders of cultural and economic contact with the U.S. PRONAF had failed in developing the border as a tourist destination, but FONATUR would succeed in developing isolated resort cities on the beaches of the Caribbean and Pacific coasts. Catering to a U.S. clientele, these new urban areas would establish islands of hybridized material cultures, accommodatingly North American yet with an identifiably Mexican and exoticized terrain, service staff, and host of consumer goods and services. In the late 1960s, two Banco de México executives, Antonio Enríquez Savignac and Rodrigo Gómez, recognized the potential of beach tourism as a way to capture foreign currency and promote the consumption of Mexican products to a U.S. and global market (Ward 2009). Unlike the

Alemán government's development of the major port of Acapulco as a beach resort destination, these new resort cities would be completely new, carved out of the jungle and many miles from the nearest established population center. Factors hindering border tourism, such as a growing preference for jet travel and the search by U.S. tourists for a close and exotic beach locale with the loss of Cuba after its Revolution, positioned the Yucatán peninsula and the nation's coastline as ideal sites for development. Savignac and Gómez organized two federal agencies to identify potential sites for development that in 1974 merged into FONATUR (Fondo Nacional de Fomento al Turismo). They followed aerial and ground surveys of the nation's 6,000 miles of coastline with extensive infrastructure and environmental studies. From these studies came the decision to construct the famous five "development poles" of tourism: Cancún, Ixtapa, Los Cabos, Huatulco, and Loreto (Clancy 2001). Cancún was the first to be developed, and by the early 1980s it exemplified the "mass tourism" so common today. Tourists stayed longer and spent more, and today the spending of 20 million foreign tourists provide the nation with its fourth greatest source of foreign income. As Evan Ward describes the new resorts, "[these] coastal border towns have now become the aesthetic and architectural face of Mexico, offering a setting that looks like Mexico but feels like the United States" (Ward 2009: 209).

Labor migration internally and abroad reached new heights with dramatic consequences for urban, rural, and national society and material culture. As industry and urbanization took off during the Mexican Miracle, the countryside fell further behind. While it had represented nearly 10 percent of all economic activity in the 1940s, by 1960, this had shrunk to 5 percent. Over the next decades, millions would leave their villages for the lure of jobs and possible wealth in the cities, the border *maquiladoras*, the fields of agro-businesses, or the U.S. Quantitative estimates of internal migration are surprising few, but analysts generally agree that migration abroad has resulted in between 10 and 20 million undocumented immigrants alone living in the United States today. Chain migration characterized this domestic and international rural exodus as a vanguard of villagers found employment and established a community support network for generations to follow. During the Miracle, some, like Lorenzo Ramírez (discussed above) found well-paid jobs in the city with multinationals like General Motors. Others, especially more adventurous young men, sought a greater payoff in the U.S. Between 1942 and 1964 approximately 2 million registered to work legally under the Bracero Program, a guest-worker program that began with the U.S. labor needs of the Second World War and remained after the war as a way for growers to exploit low-wage labor. Although analyses often remark that most were seasoned agricultural employees, many young men from the slums of Mexico City and other urban zones made the trip.

Manuel Sánchez, the eldest of *The Children of Sánchez* interviewed by Oscar Lewis (1961), recounted how in the mid-1950s the inability to get ahead in Tepito, the death of his wife, and the coaxing of his friend convinced him to leave for California with eight pesos. Manuel did not stay long, but his perception of the greater material and social equality north of the border shaped his expectation of a better life once he returned home. He and his coworkers "all noticed that even the workers who were not so well off, had their car and refrigerator" (Lewis 1961: 338) Perceptions of better social equality also impressed him, whether employer–employee relations and workers' rights or gender and marriage relations (Lewis 1961: 338–339; 335). Returning home by jet, Manuel became disillusioned by the contrasting poverty and inequality, yet he took steps to change his world. He changed how he related to women and as his material

expectations grew he eschewed the low wage labor of his past for what he called the "freedom" and wealth of entrepreneurship as one of Tepito's famous resellers (Lewis 1961: 341–348).

Indigenous communities joined both forms of migration. According to the National University's (UNAM) Instituto de Ecología, by 1980 an estimated 550,000 indigenous people, or one-tenth of their population, lived in areas of nation other than their place of origin. More than 300,000 of those lived in Mexico City, finding low-wage employment in construction, domestic service, and the informal sector. Oaxaca's indigenous populations, particularly the Mixtec, Zapotec, and Chinantec, led the nation in this outflow migration. Indigenous groups also migrated to the U.S. For example, Zapotec migration to southern California began in the early 1970s, drawn by the work in construction, landscaping, and other trades. With the total collapse of the Miracle in the early 1980s, this early community beachhead expanded exponentially. Zapotecs made up most of today's Oaxacan Indian community in Los Angeles, a population estimated at between 60,000 to 200,000. Adapting their traditional sport of *pelota mixteca* to North American basketball, the Zapotecs have kept a strong community identity based around weekly tournaments that host between 15 and 55 teams (Quinones 2001: 117–136).

As the Zapotec migration boom indicates, in the 1980s and 1990s desperate Mexicans expressed with their feet their opinion of their leaders' ability to deliver the good life and goods. Immigration to the United States (and, to a lesser extent, Canada) doubled every decade between the 1970s and 1990s and affected rural and urban areas of every state in the nation. Their cumulative new wealth, expectations, and patterns of consumption have transformed their nation's material culture and even politics. Their remittances sent to families back in home villages, towns, and cities increased from $4 billion to $26 billion in 2007, edging out the *maquiladora* industry as the second largest source of foreign income for Mexico after oil. Immigrants send the money to help out family and community, but also to express through conspicuous consumption their economic success. This money has financed a massive building spree in small towns throughout the Republic. American dollars transformed housing stock in isolated villages from one-storey "homes of adobe with hard-packed dirt floors and latrines out back" to "beautiful houses with marble tile, gravel driveways, and wrought-iron fences" complete with satellite dishes and another amenities. These structures would take years to complete, reliant upon monthly installments and the labor of owners who returned for only a month or so every year for village festival celebrations (Quinones 2001: 285). Housing is only one dimension of immigrant conspicuous consumption. Immigrants also seek to outdo each other in their philanthropy, financing renovations and construction of churches, plazas, roads, museums, gymnasiums, and other institutions and infrastructure that bring respect to the donor and his family (Quinones 2001: 289). Prodigal sons would return for festivals in new clothes, driving new trucks, and waving around U.S. dollars, further spurring the young and risk-takers to head north to become rich. For much of the year these houses remain empty and the towns depopulated as residents return to the U.S. Not all stay away. For those immigrants who come home and stay home after stints in the city or U.S., many find their new attitudes and patterns of consumption do not always mesh well with traditional community values. Journalist Sam Quinones, who has produced some of the most interesting work on the transformative influence of both internal and transnational migration on Mexico as well as the United States (Quinones 2001; Quinones 2007),

writes of the spread of US Southwestern *cholo* by young males returning to Mexico. In his essay "West Side Kansas Street," Quinones describes the reconstruction of L.A. gang culture in Zamora, Michoacán, by the underemployed youth along Avenida Juárez. He describes the adoption of the vocabulary, signs, tattoos, Dickies pants, and graffiti that kids have adopted since two of their members returned in 1991 from Los Angeles and the real Kansas Street gang. At the same time, he notes accommodations made to Mexican realities, especially economic ones. Unable to afford cars, chromed low rider *bicas* became the ultimate status symbol, some costing as much as $1,000, while a stripped down version ran about 300 pesos. "Since the bikes are so low to the ground … [gang members spend] a lot of time walking them down the street" (Quinones 2001: 168).

Narcoculture and the rise of popular religious cults like Santa Muerte (Holy Death) have staked a claim to the material cultural landscape of the nation. Narcoculture, among the tens of thousands of participants in the drug trade, is characterized by breathtaking conspicuous consumption. The trade, never precisely valued but clearly worth tens of billions of dollars, funds opulent mansions, heavily armored SUVs, incredible spending binges on entertainment, and a remarkable industry of embellishing firearms with precious metals and stones—often described as "narco bling." The Museum of Drugs, run by the military for training purposes and not open to the public, houses contraband seized in the war against the drug cartels such as gold-plated pistol with over two hundred diamonds in the grip, or the Colt 45 grip with rubies and emeralds in the shape of a crown. Opened in 1985 in spacious quarters, curators now say they are running out of room. Narcocorridos, songs of the drug trade and its practitioners based on the traditional ballad form, have become a popular musical form. Chalino Sánchez (Quinones 2001: 11–30) and Los Tigres del Norte are perhaps the most famous popularizers of the form, and Los Tigres' 1974 hit Contrabando y Traición is still the most famous song of the genre.

Narcoculture embraced a number of popular saints such as Jesús Malverde and Santa Muerte enshrined in Culiacán, Sinaloa, and Tepito, respectively. Authorities have claimed that these popular saints are specifically patrons of drug traffickers, yet many others claim they speak for the poor and marginalized of society. Investigative journalist Charles Bowden, perhaps one of the best and most fearless reporters on illegal immigration and the drug trade, contends that Santa Muerte's surging popularity responds to the failure of political and religious institutions to address the basic needs of a population pummeled by the globalization and economic restructuring represented by NAFTA. Thousands attend her shrine and procession in Tepito, asking for protection and leaving candy bars, cigars, jewelry, fruit, money, exvotos, tequila, and bullets. An impressive line of Santa Muerte-branded commodities, such as candles and t-shirts, can be found not only in Mexico but also throughout the U.S., from small *tiendas* in Tuscaloosa to major *mercados* in Chicago. Mexican truckers visit her chapel at the interchange of I-35 and the World Trade Bridge in Laredo that appeared in 2001. She is, in Bowden's words, "the saint for drug dealers and truckers and for anyone else who understands that the game is not on the level and help is necessary for survival" (Bowden 2006: 49; Perdigón Castañeda 2008).

Ice cream helped a small town in Michoacán not only weather and thrive in the chaotic conditions of modernity, but also provide consumers with a national brand with a rural identification. The town of Tocumbo, "the wealthiest village in Mexico" according

to Michoacán native and famous historian Luis González y González, is the home of the famous *La Michoacana* brand popsicle (*paleta*). Anyone who travels to Mexico has tried—or ought to try—the inexpensive, high quality, fresh-fruit laden ice cream on which a national population has now been raised. Somewhere between 8,000 and 15,000 *Michoacana paleterías* exist nationwide (a range created by inaccurate statistics and part-time vendors); they are found in nearly every plaza, mall, or other venue where Mexican's can satisfy their deeply historic love of ice cream (González de la Vara 2006). Claim to the first shop is contested by partisans of Agustín Andrade and Ignacio Alcázar, but both Tocumbans opened ice cream stores in Mexico City by the Second World War and were flourishing within a decade. They began expanding by selling stores to trusted employees, financing them with low rates of interest that solved the perennial problem for small businessmen of acquiring bank credit. Making ice cream fresh in each shop and avoiding a centralized corporate structure kept costs low, expansion ongoing, and locked in the loyalty of an enormous working-class ice cream market. Over the next half century, thousands of Tocumbans decided against emigration to the U.S. and then participation in the lucrative drug trade, and instead opened *paleterías* throughout the towns and cities of the Republic. Although major foreign competitors like Baskin-Robbins and Häagen-Dazs entered the market in the 1990s, *La Michoacana* thrived with its low prices, high quality, customer loyalty, and small-town national identity (Quinones 2001: 267–282). A pivotal moment in *La Michoacana's* history came in 1959, when Rafael Abarca experimented with a wide range of fruit flavors and implemented higher quality production methods including stainless steel popsicle molds, an expectation and technology he may well have learned while in three previous work stints in the U.S.

Contact with the U.S. has only increased since the 1970s through tourism, immigration, and, of course, the consumer market, but it is this last area that concerns cultural nationalists the most. The act of consumption is a social one, both reflecting and constructing personal and other identities. Nestor García Canclini identified the nexus of consumption, material culture, and identity formation: "when we select products and we appropriate them, we define what we publicly consider valuable, the ways in which we integrate and which distinguish us in society, in which we combine the pragmatic and the enjoyable" (García Canclini 1995: 19).

Political scientist Stephen D. Morris has studied "consumption patterns, marketing, and advertising studies" over several decades as part of a larger project to identify continuity or change in perceptions of the U.S. and Mexican nationalism. Underlying this study is a test of the notion that greater cultural contact after the Second World War, and especially the dismantling of the government policies of economic and cultural nationalism, has led to a weakening of a national identity. His findings are instructive in the highly culturally-sensitive area of food. While U.S.-based franchises have moved steadily into the national market since the early 1990s, Morris notes that Mexican firms make up 60 percent of the 400 master franchises and U.S. companies make up only 6 percent of the retail and restaurant sector. In a sobering comparison, Morris cites a government statistic that in the late 1990s 235 McDonald's competed against 180,000 taco stands across the Republic (Morris 2005: 217). Rather than showing an outright preference for foreign over domestic goods, consumers "were rather neutral about imported goods" and preference depended on the product line. Students consistently ranked the U.S. higher for bicycles, autos, and watches, but lower than Mexican products for beer, shoes, and crystal. This and other similar studies lead Morris to conclude

that "Mexicans seem generally to prefer U.S. products that are 'higher-tech' and less 'cultural,' like TV sets as opposed to TV programming…" (Morris 2005: 222–224). Mexican programming on television consistently gains higher ratings than U.S. programs, and the *telenovela* remains a surefire and beloved genre. The same applies to music, with studies finding a clear preference for Mexican radio stations and music. Perhaps surprisingly, when it comes to music videos MTV Latin America discovered that teens preferred Mexican acts even more than their older siblings (Morris 2005: 218). Morris provides cause to question cultural critics like Carlos Fuentes and his famous attack on the Mexican middle class for trying to emulated the U.S.'s *pepsicoatl* culture, and Carlos Monsiváis for his claim that the middling classes have produced a "progressive weakening of cultural nationalism" (Morris 2005: 225; Fuentes 1971: 19; Monsivais 1976: 1486). Cultural nationalists like Fuentes, Monsivaís and others "posit a zero-sum game in which the acceptance of the U.S. culture means the decline of Mexican national culture" (Morris 2005: 232). Yet it is youngsters like those watching MTV Latin America and of the classes decried by Fuentes who are today resurrecting the "Hecho en México" campaign at a grass roots consumer level. Incomprehensible to Fuentes, they are snapping bags, t-shirts, and other items from street vendors with the classic label, probably en route to picking up a Pepsi.

Conclusions

Mexican national culture is not just the product of an official project nor can it possibly remain static. Anticipating postmodernity, Mexican identities have always been hybrid and fluid, beginning with the conquest by the Spanish, to the Anglophilia and Francophilia of the nineteenth century, to the onslaught of American material and popular culture of the twentieth century and into the twenty-first. In every case, an "outside" model of civilization or later modernity has left its mark on the material culture. Similarly, national governments from Benito Juárez and Porfirio Díaz onward to the PRI have engaged in cultural modernization projects. Relying heavily on standardizing patterns of consumption and material cultures they have sought to create an imagined national community by integrating the mosaic of "*patrias chicas*" that make up the Republic.

The people have not accommodated this passively. William H. Beezley contends that popular curiosity of the geographic, ethnic, and cultural diversity of the new nation gave rise in the nineteenth century to a popular national identity. Itinerant puppeteers, almanacs, popular games such as *Lotería*, and other entertainers and ephemera of nineteenth-century daily life and material culture catered to that curiosity. Unlike in official representations of national identity, this cultural production had to satisfy a paying audience or the producers would go hungry. The inclusionary character of popular identity contrasted sharply with the exclusionary, homogenizing vision of national identity peddled by the national government (Beezley 2009). Much as the people remained selective in their construction of a national identity, so too were they in their incorporation of new patterns of consumption, goods, and values. They did so when those objects, attitudes, and behaviors could either mesh with existing cosmologies or when they could prove their utility as new social and cultural contexts arise.

Perhaps the great irony of a Mexican national identity and material culture is that they owe their provenance more to the impersonal, often brutal, and global forces of modernity than they do the projects of cultural modernization and nationalism that have been

the hallmark of the nation's paternalist regimes since the mid-nineteenth century. Market influences and the processes of industrialization, urbanization, and globalization have largely integrated the micro-cultures of the country. Trade, war, employment, and mass media, and the modernizing infrastructures and technologies that realized their presence and necessity, have impelled citizens to expand their horizons to the people and places beyond their *patrias chicas*. In their journeys they have relied upon traditional and novel patterns of consumption to make sense of their reality and define their individual and group identities ranging from the family to the nation. A popular sense of national identity, while often sharing common national symbols (such as the flag and the Virgin of Guadalupe) and a common pantheon of national heroes, has always proved more durable than an official nationalism.

Not surprisingly, then, the fall of the PRI has not proven apocalyptic to a national identity. Even in an era of globalization and supposed postnationalism, the wholesale Americanization and the denationalization of the population has not occurred. The history of consumption and material of the nation reveals that Mexicans continue to construct individual and national identities that are multilayered and hybrid, at once comfortable with their transnationalism yet indisputably "Hecho en México."

Note

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Geographic Regionalism
and Natural Diversity

CHRISTOPHER R. BOYER

1.   The Physical Setting

Mexico's national space in some ways appears easy to characterize. Most of the country is both high (over 1,000 meters in altitude) and dry (receiving an annual rainfall of less than 15,000 mm, or 30 inches, that typically falls from May to October). With the exception of the far north, the nation lays within the pre-Hispanic culture region known as Mesoamerica (an area that extended along the coasts, through central Mexico, and into Central America). The indigenous peoples of Mesoamerica did not regard themselves as having a common heritage, but they nevertheless shared certain characteristics, including a conception of time that combined the solar year with a 260-day ritual calendar, the construction of pyramids in cities that served as ritual, administrative, and economic centers, and a dependence on agriculture based on beans, squash, and, above all, corn. Today, Mexico's population is strikingly uniform in religious and ethnic terms. Most Mexicans are Catholic and have a mixed race or *mestizo* heritage of European, African, and indigenous ancestry. Yet such generalities obscure the nation's complicated history and immense cultural, geographic, and ecological diversity.

Mexico numbers among the most ecologically diverse nations in the world. It is home to approximately 2,500 species of terrestrial vertebrates, 802 of which are endemic (that is, found only in Mexico). As many as 18,000 to 30,000 species of plants grow there, around half of them endemic. Much of this diversity results from the nation's varied landscape, which includes two major deserts, nine mountain peaks reaching over 4,000 meters (13,000 feet) high, and a gamut of tropical ecosystems along more than 9,000 kilometers (5,600 miles) of coastline. The nation's geography is dominated by two mountain ranges that form a huge U with the southern vertex in the so-called Trans-Mexican Volcanic Belt that traverses the densely populated south-central region from Colima to the state of Veracruz. The Sierra Madre Oriental range forms the eastern arm of this vast, mountainous U. It juts like a spine from the state of Puebla to Nuevo León. The more massive Sierra Madre Occidental rises along the Pacific coast as

far north as the Sonoran border before giving way to the high deserts of Arizona. Between these two ranges lies the *altiplano*, a high plateau that embraces most of central and northern Mexico. The *altiplano* itself is divided into two regions: the expanse north of Zacatecas known as the Mesa del Norte, where the altitude averages 1,100 meters, the rains fall little, and population density is low; and the Mesa Central that stretches as far south of Zacatecas as Puebla, has long been home to the largest cities, and has a more temperate climate despite its average altitude of 2,000 meters above sea level. Further to the south and west is the third major mountain range, the Sierra Madre del Sur, that rises almost straight out of the Pacific from the Jalisco coast, through Colima, Guerrero, and Michoacán before flattening out at the Isthmus of Tehuántepec in Oaxaca (Tamayo 1962).

The wide variation in altitude, climate, and latitude produces an equally broad variety of forests, which geographers have divided into four major types including the pine-oak forests that predominate in the Sierra Madre Occidental and Sierra Madre del Sur, the dry broadleaf forests along the Pacific seaboard, the tropical rainforests along the Caribbean coast and parts of the Atlantic hotlands (*tierra caliente*), and the spectacular cloud forests found primarily in the highlands of Tamaulipas, Veracruz, and Oaxaca. Between 10 and 15 percent of the species in these woodlands is native to Mexico. Some of these ecosystems are more diverse than others: the cloud forest occupies only 1 percent of the national territory, for example, yet accounts for 10 percent of the plant species in Mexico. (Rzedowski 1978; Rzedowski 1993).

Over time, humans have modified this environment in a number of ways. Agriculture posed a modest threat to some of these forest ecosystems even before the conquest, as indigenous peoples had deforested around 15 percent of land around the valley of Mexico for agriculture at the time of conquest. Nezahualcóyotl—the great philosopher-king of Texcoco—found it necessary to place some forests in the Valley of Mexico off-limits to guard against over-cutting and erosion (Borah and Cook 1963; Simonian 1995). Indeed, the pioneering scholar Sherburne F. Cook suggested that the conversion of forests for use as cropland had produced such widespread erosion that the heavily populated parts of central Mexico lay on the verge of demographic catastrophe by the time of conquest (Cook 1949).

While native practices may not have been sustainable over the very long run, European colonialism, microbes, and animals posed a far more severe threat. When the Spanish arrived in 1519, they not only decapitated the native leadership and unleashed a devastating combination of Old World illnesses, they brought with them horses, pigs, cattle, and sheep that not only invaded indigenous people's croplands and aggravated the subsistence crisis caused by demographic collapse – a phenomenon only slightly ameliorated by laws requiring colonists to keep their livestock a safe distance from indigenous communities – but contributed to deforestation by browsing on saplings and to erosion by trampling a native flora not adapted to their presence (Melville 1994). As we shall see below, the conversion of natural landscapes to agricultural uses has posed an increasingly serious threat to the environment ever since.

Mining became a mainstay of the colonial economy and began to transform the landscape as miners gobbled up wood for construction materials and fire used to refine silver (Melville 2000). Mining and logging did extensive damage until the late nineteenth century, when the commodification of wood placed the nation's largest forests in jeopardy. North American and British lumbermen began to use steam power and a nearly slave-like system of debt peonage to make ever deeper incursions into the tropical

rainforests of Tabasco, Quintana Roo, and Chiapas in southern Mexico in search of mahogany prized by furniture makers of the developed world (Vos 1988; Konrad 1992). At the same time, North American railroads, built to support the mining boom in north-ern Mexico, began to commercialize timber on a vast scale, thanks in part to immense forest concessions given by the Díaz regime to railroad-cum-timber companies such as the Kansas City, Mexico, and Oriente. While revolutionary land reform quashed these concessions and sparked the advent of scientific management in the mid-twentieth cen-tury, commercial logging (now by Mexican corporations), the expanding agricultural frontier, illegal cutting, and simple mismanagement during the twentieth century have all but destroyed old growth in temperate pine-oak forests. (Boyer forthcoming). Even though Mexico ranks among the most rapidly deforesting nations in the world today, historians have yet to undertake a sustained analysis of how forests have both shaped and been shaped by human behavior.

   Unlike the other major countries of the Americas, Mexico's major cities do not lie on navigable rivers, although boats can access the lower stretches of some more distant waterways such as the Pánuco, Usumacinta, Grijalva, and Papaloapan. The lack of a river network in the more densely populated central part of the country made it difficult to transport food and build markets over long distances, and created significant barriers to economic development, particularly during the colonial and independence eras. Railroads began to address the problem in the late nineteenth century (Coatsworth 1978), at which point, trade, state formation, and an increasingly well-defined sense of shared national identity began to overcome generations of isolation imposed by geography. Even then, however, many people continued to give their primary allegiance to their community or regional homeland, or in other words the so-called *patria chica*.

2.   The Valley of Mexico

As a patchwork of *patrias chicas*, one of the strongest regional identities corresponds to its political and geographic center. The Valley of Mexico has given rise to the most spec-tacular indigenous empires in Mesoamerica and has served as the political seat of the Aztec Empire, New Spain, and Mexico ever since the fifteenth century. Until recent times, it had an incredibly diverse ecosystem that nevertheless supported one of the most productive anthropogenic agricultural systems in the world. The unique ecology of the "valley" can partially be explained by the fact that it is actually a basin—the low point of a hydrological watershed—originally dominated by a network of connected, shallow lakes including the Chalco, Texcoco, and Xochimilco that once covered over 1,500 square kilometers of the basin. The abundance of water, combined with the presence of mountain ranges in all directions, made the Valley of Mexico a natural fortress and encouraged the development of a series of imperial cities, the most famous of where were Teotihuacán, (roughly 100 B.C. to 750 A.D.), and Tenochtitlan, the primary seat of the Aztec empire (1428–1521) described in countless books, including most recently Alan Knight's overview of the pre-Hispanic era (Knight 2002).

   The valley provided access to a range of natural resources. It had major deposits of obsidian, a hard volcanic glass used throughout the pre-Hispanic era to make knives, the heads of spears and arrows, and the cutting edge of the club-like swords known as *mac-uahuitl*. The valley was also a prime habitat for fish, deer, waterfowl, and other sources of food. Most of all, indigenous peoples developed an impressive and complex relation-ship with the lacustrine environment. They traversed the lakes with canoes and punts

until well into the nineteenth century, giving rise to a complex network of trade among shoreline communities. They built phenomenally rich soil beds known as *chinampas* by heaping layers of mud and aquatic vegetation that extended into the lake itself and helped to sustain a population of approximately 1.5 million souls at the eve of the conquest. In 1449, the Aztec empire further refined their command of the valley hydrology by building a dyke that separated the southern, more saline lake water from the northern fresh water (Ezcurra 1991).

Europeans had a far less harmonious relationship with the lakes. In 1555, uncommonly prolonged rains overwhelmed the existing hydrological works and massively flooded Mexico City, damaging scores of buildings and perhaps contributing to a subsequent horrific outbreak of smallpox; it was only the first of a series of devastating floods that struck the city over the next century. Historian Charles Gibson explains that Spanish colonial authorities responded with a massive draft of indigenous labor to rebuild the dyke separating the fresh- and saltwater lakes. They also began a centuries-long effort to rebuild canals and partially drain the lakes in a bid to reduce the likelihood of more flooding and, so they believed, to open more agricultural land. The new dyke held, but the other projects succeed primarily in increasing the alkalinity of soils, reducing indigenous croplands, and restricting traditional uses of the lake and marshland (Gibson 1964). Only during the Porfiriato with the application of steam power did residents succeed in draining most of the water from the environments of Mexico City. At the turn of the century, Díaz inaugurated the *gran canal de desagüe*, a 47-kilometer manmade river and ten-kilometer Tequisquiac tunnel, which moved the water northward out of the Valley of Mexico to the Valle del Mezquital, where it is used to irrigate crops. Whereas historians have begun to investigate the technocratic faith in humanity's ability to transform the landscape that led to the construction of the canal (Perló Cohen 1999; Agostoni 2003), they have only begun to study the effects of its "success." The canal failed to alleviate flooding in the short term, sparked huge dust storms that swept up the newly exposed soil, and made the city desperately dependent on wells sunk ever deeper into the aquifer, causing the entire city of Mexico to sink so alarmingly that authorities repeatedly banned further well drilling as early as the 1950s. Today, the canal functions as a sewage outlet. Yet the city has sunk so much that the canal is actually higher than the city, and the sewage only continues to flow thanks to a series of eleven half-century-old pumping stations. Once the repository of so much water that generations of "experts" sought ways of draining it away, Mexico City now faces shortages so severe that rationing has become a way of life. (Simon 1997; Vitz forthcoming).

The Valley of Mexico is rimmed to the South by the iconic volcanoes of Popocatépetl ("smoking mountain" in Nahua) and Iztaccíhuatl ("white woman") that preside over Mexico City and take their names from pre-Hispanic legends about an Aztec warrior and his star-crossed lover. Although volcanoes punctuate mountain ranges from Baja California to Chiapas, it is the volcanic belt across the nation's midsection that has cast the longest shadow on Mexico's physical, historical, and cultural landscape. Volcanoes are so naturalized within the Mexican imaginary that historians have all but taken them for granted. In many ways, these volcanoes form central images in the national imagination, particularly in the years after independence. They have been reproduced in countless works of art such as those of *costumbrista* artist Johann Moritz Rugendas (1802–1858), landscape painter José María Velasco (1840–1912), and revolutionary artist and sometime vulcanologist Dr. Atl (aka Gerardo Murillo, 1875–1964). These artists, along with intellectuals such as Vicente Riva Palacio (whose monumental *México*

a través de los siglos cleverly depicted images of the twin volcanoes in the frontispiece of volume II to resuscitate the colonial heritage) used the landscape of the valley to underscore fundamental narratives of nationhood, such as Mexico's mixed-race *mestizo* heritage, the arrival of modernism, the religio-national patronage of the Virgin of Guadalupe, and of course the centrality of the Valley itself (Cañizares-Esguerra 2006). It is hardly a coincidence, then, that the first national map published in 1857 by Antonio García Cubas not only "scientifically naturalized the Mexican nation-state," in the words of Raymond Craib, but featured an engraving that visually equated the best-known volcanoes (Popo and Izta, along with the Pico de Orizaba, and the Cofre de Perote) with the nation itself (Craib 2002).

Today, the Valley of Mexico is virtually synonymous with the urban center that covers its entire northern expanse. Mexico City is the largest urban agglomeration the world, with a population in the neighborhood of 21 million, and home to one of every three Mexicans who reside within the national territory. Although it faces problems common to other mega-cities, including tortuous transportation, rampant crime, and an overburdened infrastructure, it also confronts a series of challenges posed by its particular geography (Davis 1994). Not only has the removal of lake water produced ongoing shortages, the ensuing urbanization on the dry lakebed makes the city uncommonly susceptible to earthquake damage, as the temblors of 1976 and, especially, 1985 revealed. Yet few systematic studies—apart from journalist Elena Poniatowska's (1995) reportage—discuss earthquakes in the nation's history. Moreover, Mexico City is now one of the unhealthiest places on earth. Its densely settled population lives and works in a valley once home to a third of the nation's industry, one that is hemmed-in by a geography that produces temperature inversions and long dry spells. The resulting pollution and waste production—indeed, thousands of people live in the city's multiple landfills—are only now coming under historians' scrutiny.

4.   Central Mexico

Physical topography defines the Valley of Mexico as a region, while "central Mexico" is a somewhat conceptual category whose meaning changes according to context and historical moment. It is an ill-defined and protean term roughly contiguous with the northern portion of Mesoamerica eventually dominated by the Aztec and Purépecha empires that became the heartland of New Spain; in its broadest sense, it includes an area from the Pacific coast of Jalisco, Michoacán, and Guerrero to the Caribbean from the city of Veracruz north through the Huasteca. Much of this region is characterized as a "sub-humid tropical climate," as a land of hot, rainy summers followed by a long dry season lasting roughly from November to June. Hotlands along the coasts, such as the low-lying *tierra caliente* along the Pacific coast and the Huasteca on the Caribbean side, enjoy more regular rains and a nearly tropical ecosystem, as do some other parts of the region, such as the Río Balsas watershed south and west of the Valley of Mexico.

The region's semi-arid climate means that water, its use and control, has had as much significance as ownership of land, particularly in the more densely populated areas close to urban markets. Historian Sonya Lipsett-Rivera has shown, for example, that land-owning European elites wrested control of irrigation systems away from indigenous communities during the early colonial period. An increasingly restricted group of land-owners used their local authority to direct water to their own fields and choke off the autonomy of indigenous communities and in some instances, neighboring haciendas as

well (Lipsett-Rivera 1999). In contrast, the less densely populated lands of the Bajío in colonial and nineteenth-century Michoacán allowed landowners to employ the more water-intensive, yet ultimately much more ecologically sustainable technique of flood-farming, in which river water is stored in temporary, shallow, reservoirs, and then dumped onto fields where it deposits nutrients and rich topsoil (Sánchez 2005). These local arrangements around irrigation and the control of water generally began during the Porfiriato, when the federal government declared sovereignty control not only over rivers, but also over much of the nation's irrigation generally. The increasingly complete federal control of water in central Mexico took another, still more definitive step forward as a result of the revolutionary land reform, when technocrats from various state agencies began to make grants of irrigation rights along to go along with the landed *ejidal* rights to rural communities (Kroeber 1983; Aboites Aguilar 1998).

Central Mexico lay on a crucial axis of global trade forged during the Spanish empire. Hernán Cortés founded Veracruz, the first permanent European settlement, in 1519, and used it as a staging point for his conquest of Tenochtitlan. The port town and its highly defensible harbor served as the primary link with Spain during three centuries of colonialism, as well as the preferred point of entry for future invaders, such as the United States in 1847 and the French 15 years later. As geographer Andrew Sluyter has explained, Veracruz's early colonization and, to Spanish eyes (and those of some subsequent analysts), relatively sparsely populated landscape made it an ideal site for herds of cattle that slowly transformed the environment and competed against indigenous people's subsistence (Sluyter 2002). Southwest of Mexico City, the port city of Acapulco soon became the principal entrepôt with the Pacific world, particularly the Philippines. Jonathan Amith's magisterial research has shown that, like Veracruz, the Guerrero heartland on the trade route between Acapulco and central Mexico attracted Spanish landowners who soon began to trade in cacao and the silver from the mines of Taxco. Demographic decline allowed them to dispossess indigenous landholders, putting new stresses on the links between indigenous elites and commoners. This dynamic contributed to the rise of one of the greatest colonial haciendas in Iguala, whose eventual collapse gave rise to a class of smallholders known as *rancheros* (Amith 2005). Nevertheless, more research is required on the geography of colonial trade, its relationship with harbors and other features of the landscape, and its ability to create cultural spaces.

The economic pull of colonial mining helped to form another economic and cultural region that has long interested historians: the northwestern flatlands known as the Bajío and the Guadalajara hinterland just beyond. The twin sub-regions are located in the Río Lerma basin and its low point, Lake Chapala, Mexico's largest fresh-water body (now an ecological disaster thanks to pollution and centuries of misuse for irrigation projects). One historian has proposed that the watershed itself constitutes the main unit of analysis for regional history (Boehm 2008), yet human intervention has left a pronounced legacy on that landscape. More-or-less distant silver mines initially helped to spark the growth of haciendas in the Guadalajara hinterland, though it soon became a major commercial and political center in its own right (Van Young 2006). Mining wealth from the north also provided a market for the city of Querétaro, which developed a precocious cash economy and monetarized trade thanks to links to Europe and Asia (Tutino 2010).

Far to the east, the region known as the Huasteca occupies much of the Caribbean seaboard and has attracted far less sustained scholarly attention. It lacked the trade routes and wealthy haciendas that long characterized the Bajío-Guadalajara region and Veracruz to south. Although the Pánuco River cuts through its center, and much of the landscape

has a tropical climate with a year-round growing season, the Huasteca is more of a cultural space than an ecological zone. The ancestral homeland of a sub-group of Nahua people, it was a land of few haciendas. Instead, *rancheros* and indigenous people have long predominated, and the often tense relations led to a "caste war" in the 1840s whose racial overtones remain evident to this day. (Schryer 1990; Ducey 2004). In part because of its particular climate and social setting, some rural communities entered the global economy in the mid-nineteenth century through the cultivation of vanilla, as Emilio Kourí has recently shown, leading them to embrace the Porfirian project of land division and privatization that in other regions provoked bitter conflicts between hacienda owners (Kourí 2004). The Huasteca also saw the emergence of Mexico's first great oil strikes, prompting foreign companies to exploit both labor and the environment until President Lázaro Cárdenas expropriated the petroleum industry in 1938 (Santiago 2006); historians have said far less about what happened thereafter.

5. Yucatán and the South

Ecological conditions impeded the development of hacienda agriculture in the Yucatán peninsula, another region characterized by a large native population and tense race relations. The peninsula is formed of a porous limestone karst unable to support much surface water. A long dry season gives way in the early summer to monsoon rains that quickly leach the soil of remaining nutrients before filtering into the bedrock and forming subterranean rivers. The bedrock has collapsed in some places to expose the water in natural wells known as *cenotes*, which provide both a habitat for birds and endemic species of aquatic life and also function as sources of water and sacred spaces for the Yucatecan Maya. Large scale agriculture is all but impossible in these conditions, meaning colonizers had to settle for cattle ranching and marginal plantation agriculture along the coast. This allowed Maya communities to maintain an uncommon degree of cultural autonomy well into the colonial period (Farriss 1992). Creole elites armed many of these Mayan communities during an internecine mid-nineteenth century conflict, but soon alienated their erstwhile allies. The result was a caste war in 1847 that nearly drove European-descended people from the peninsula (Rugeley 1996). The creole elite eventually succeeded in regaining most of the Yucatán. When a market emerged in the late nineteenth century for sisal (a yucca-like plant native to the Yucatán used to make binder twine for North American wheat farmers), this landowning elite established a plantation economy that virtually enslaved many indigenous communities (Evans 2007).

Much of the rest of the south is divided into lowland tropical forests in the states of Tabasco and southern Veracruz, and some of the nation's most ecologically diverse highlands in the Pacific states of Chiapas, Oaxaca, and southern Guerrero. Like the Yucatán, the Caribbean held little promise to outsiders other than the mahogany loggers mentioned above, at least until the mid-twentieth century. The 1970s brought a series of major new discoveries of oil reserves in Tabasco, which has become the nation's primary producer at the cost of ecological destruction on a vast scale—a topic thus far unexplored by historians. Migration has also spelled trouble for the tropical forests. Today, the Lacandón rainforest of Chiapas and the tropical forests of Campeche have lost well over half of their extension to cattle pastures opened by poor rural people and commercial ranchers, a process abetted by policies in the 1970s and early 1980s that encouraged people to remove tropical forest cover. The scale of the destruction, as well as the Zapatista revolt in Chiapas, has focused some scholars' attention on the area (Nash 2001).

The highlands from Chiapas to Guerrero punctuated by the lowlands of Tehuantepec encompass the greatest biological and cultural diversity in Mexico. In many parts of this region, a single hectare can sustain 200 species of trees and far greater numbers of other plants, insects, and animals. Best known to historians is the state of Oaxaca, which is crisscrossed by three major mountain ranges as well as the western cloud forest known as the Chimalapas. Indigenous people developed a complex relationship with this landscape and succeeded in working out diverse social and agricultural forms for using it, but, as in other areas of heavily indigenous Mexico, the Spanish colonists had little understanding of either, preferring to develop internal markets for such desirable commodities as cotton, cochineal, and foodstuffs. (Chance 1989; Terraciano 2001). By the early twentieth century, commercial logging also began to make substantial inroads, often with the overt support of local officials who demanded a share of the profits (Smith 2009).

6.　The North

At the opposite extreme of the nation, geographically and ecologically, lie the great northern deserts and pine-oak forests. No part of the north has received more attention than the Sonoran desert that spans California, Arizona, Sonora, and much of the Baja California peninsula. A xeric landscape that nevertheless sustains a plethora of native species, including saguaro cacti, scores of reptiles, and a few large predators, including jaguars and the last wild population of Mexican grey wolves, scholars have written about these lands ever since Carl O. Sauer, the dean of American historical geography, paused to consider the people and landscapes encountered by early Spanish explorers opening the route northward from Central Mexico (Sauer 1932). More recently, geographer Robert C. West has explained how Sonora's "geographical personality" has influenced the lives of the indigenous people and colonists who have confronted its often harsh climate (West 1993). Historian Cynthia Radding has expanded on these ideas and explained how indigenous peoples' subsistence practices grew out of their relationship with landscape—a balance that was changed but not completely undone by the advent of mission agriculture (Radding 1997).

While exploration and the possibility of creating utopian missions drew colonists to what is now northern Mexico, the region was hardly a likely candidate for European colonization. Known as the Gran Chichimequilla since well before the Spanish conquest, north-central Mexico had little rain, almost no land suitable for agriculture, and was home to a number of semi-nomadic indigenous peoples whom outsiders referred to with the catch-all and implicitly derogatory label of "Chichimecs." In the eighteenth and nineteenth centuries, indigenous peoples in Mexico, such as the Yaqui, and those pushed southwestward by settlement in the United States, such as the Apache and Comanche, defended their territories (and in the case of the Comanche, their empire) with violence (García and Herrera 2000; Hämäläinen 2008). The discovery of silver in Zacatecas in 1546 and subsequent strikes in Guanajuato, San Luis Potosí, and Pachuca changed all that. Silver quickly became the mainstay of the Spanish economy, making continued settlement of the near north a foregone conclusion. Much of the labor for these mines initially came from forced labor *repartimiento* arrangements, though indigenous resistance and the ongoing demographic catastrophe soon made this untenable, and labor demands were soon filled by a combination of *repartimiento*, paid wage labor (mostly by Indians), and a modest number of slaves. Timber in the region of the

Zacatecas mines, and most likely others as well, disappeared nearly overnight, as colonial mining established a precedent for the simultaneous exploitation of workers and the environment (Bakewell 1971).

The availability of scarce water influenced the pace and location of settlement in the north and often became the source of bitter, even violent, disputes. The local arrangements and regional covenants the newcomers established to regulate the use of water set controversial precedents that some cases have endured to the present day (Meyer 1984). By the nineteenth century, the incongruous presence of water in the midst of the vast Chihuahua desert in a region known as La Laguna also spawned a hacienda economy based on food and cotton production. Located at the boundary of what are now the states of Durango and Coahuila, the Laguna is fed by the Nazas river, which flows out of the Sierra Madre Oriental and meanders into the desert where it once filled the shallow Tlahualilo lake until the 1840s, when one of the river's principal branches suddenly (and apparently naturally) shifted course. As a watershed largely cut off from other ecosystems, the river has developed a strikingly complex ecology. It supports a staggering 26 species of endemic fish, though a series of dams built in the 1940s to nourish agrarian reform have placed the regional ecosystem in jeopardy (Wolfe 2008).

The north also puts on display, like few other parts of Mexico, the intertwined influence of history, politics, and geography in the shaping of human and non-human life. The contemporary US–Mexico border is a result of the 1846–1848 U.S. war against Mexico and the resulting treaty of Guadalupe Hidalgo that transferred half of what had been Mexico's territory to its land-hungry northern neighbor. Some Mexicans living north of that borderline had been drawn into the North American market and emerging national state even before the conflict began, but many others were suddenly cut off from a nation they considered their home (Reséndez 2005). As Paula Rebert has shown, the negotiations set of a decades-long effort to survey and map the border and establish definitive boundaries, a project that forged each nation's understanding of the geography of the (new) borderlands (Rebert 2001). Yet the apparent fixedness of the border belies the common history that has sometimes joined the fates of the people on the borderlands while contradictorily dividing its peoples along economic, ethnic, and national lines. While some historians have begun to write histories of this often harsh "fugitive landscape," (Truett 2006), the broader historical project of defining it as a transnational space in social and ecological terms has only just begun.

Conclusion

To say that Mexico is a land of regional and biological diversity is in one sense to conflate political and natural history. After all, the political boundaries of New Spain and Mexico—just like the territorial claims of indigenous empires, cities, and family units before them—are the products of human actions, not of nature. In other words, "Mexico" is an artifact of human ideas and politics. On the other hand, geographic and ecological features have helped to structure how people have used the land and conceived of its natural boundaries and those of its constituent regions. For example, successive indigenous empires recognized the Valley of Mexico as a privileged ecosystem whose bounties they could harness. Their efforts to expand their territory and sphere of trade helped to define the boundaries of a nation. And Mexico's environment played a role in colonialism: As Alfred Crosby has suggested, Spanish colonists were drawn to Mexico in part because it reminded them of their homeland. Like other Europeans, the Spanish sought out places

whose climate seemed familiar and then transplanted animals and crops (and microbes) from home in an effort to create "neo-Europes" (Crosby 2004). This so-called "Columbian exchange" (Crosby 2003) was only the most spectacular example in a long line of human efforts to mold Mexico's environment to suit their needs. From the hydrological projects of the far northern Laguna to the state-sponsored colonization of southern rainforests, human activity has transformed Mexico and its regions into a national *and* ecological space. This process continues today, as Mexicans work to use and, increasingly, to conserve their environmental patrimony.

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CHAPTER SIX

The Cactus Metaphor

DAVID YETMAN[1]

> Guadalajara en llano
> México en una laguna
> Guadalajara en llano
> México en una laguna
> Me he de comer esa tuna
> Me he de comer esa tuna
> Me he de comer esa tuna
> Aunque me espine la mano
> —Mexican folk song

Mexico's tricolored flag, its most prominent symbol of national unity, portrays an eagle perched on a prickly pear cactus clutching a snake in its beak and a talon, while it grips the cactus with the other talon. Eagles and snakes are cosmopolitan creatures and appear widely in cultural symbolism worldwide, but only in Mexico do cactus symbols pervade national identity.

Europeans who arrived in the newly discovered lands to the west across the Atlantic in the fifteenth and sixteenth centuries encountered a wonderland of strange, exotic, and enticing new plants and animals. No plant family gained such immediate attention as the cacti. Nothing like these spiny, leafless shapes grew in Europe. A few of the handful of navigators who had visited southern Africa had possibly seen plants Africans now call "cactus," but odd as these were, they were not members of the Cactaceae—the cactus family. Instead, they fall in the genus *Euphorbia*. Though the African Euphorbias grow into exotic and bizarre forms (from a European standpoint), they did not begin to match the array of cacti of the Americas, nor were they a food source.

Within a few decades of Columbus's announcement of a world new to Europeans, travelers to the Americas were bringing home horticultural additions to their own flora. Cacti figured prominently among the curios and novel plants brought back. Europeans and visitors to Canary Islands, Mediterranean Europe, and North Africa now regard some cacti, especially prickly pears (*Opuntia* spp.) as part of the Old World's native flora.

In spite of the millions of plants, cultivated and wild, that flourish there, nevertheless, they are all of American origin. Only one of the 1800 or so species of cacti[2] grows naturally outside the Americas, a viney, tree-bound draping plant of the genus *Rhipsalis*. It frequents humid forests of east and west Africa. A bird migrating or blown off course quite probably acted as transporting agent, a sticky seed from a South American plant adhering to it or hung up in its digestive system. The seed wound up deposited in a tree somewhere in tropical Africa where it germinated and proceeded to colonize. Apart from this solitary transfer, *all* the remaining members of the cactus family are native only to the Americas.

Conquistadors and their entourages encountered a bewildering variety of cacti ranging from gigantic trees over 60 feet tall with hundreds of branches and weighing many tons, to tiny plants hardly larger than doubloons. Cacti appear in a wide variety of shapes and forms, and include ground-hugging, well-concealed loners, viney plants that encircle shrubs, trees, and buildings, pendant vines, sprawling, bramble-like bushes, and enormous clusters of grapefruit-size clumps. On the coastal plains and offshore islands of Sonora, as well as on caliche-rich hills of the Valley of Tehuacán, Puebla, giant columnar cacti form forests of nearly impenetrable density.

Nearly all cacti and most cactus fruits protect themselves from unwelcome herbivory with an abundance of spines, as Europeans quickly discovered. Those innocent of contact with cacti are usually surprised and impressed with the efficacy of spines as a defense. Not all cacti bear spines (for example, *peyote*) and some fruits are spine-free (all those of the large genus *Pilosocereus*), while others bear scales instead of spines. But the species that seem the most interesting and useful seem also to be among the best fortified with spines. The colorful and seductive fruits of prickly pears and *pitayos* (columnar cacti of the genus *Stenocereus*), almost beg to be plucked from the stems and branches and consumed, but must be harvested with practiced dexterity. In addition to their ability to puncture the skin, some spines harbor toxins that leave a lasting sting or ache, a powerful reminder not to mess with the plants. *Tunas*, especially wild ones, harbor millions of tiny, hardly noticeable spines that can render one's life miserable. Many an American native must have derived amusement watching the arrogant conquering Spaniards grimace and squirm following the foreigners' naïve encounters with cacti. Once Spaniards had paid close attention to the defensive anatomy of the fruit of cacti and learned how to avoid being pricked or stabbed, however, they indulged in them as enthusiastically as the natives. They learned quickly to avoid the large spines that arm the branches and the fruits of many cacti, as well as the *glochids* (*alguates* in Spanish), the term for those tiny, nearly invisible spines that frequent the fruits and cladodes (pads) of plants of the genus *Opuntia*.

The early Europeans arriving in the Americas found a bewildering proliferation of cacti. They were also impressed that many of these plants, in addition to the admirable but daunting defenses afforded by their spines, were widely used and even cultivated by peoples of Mesoamerica and in the highlands of Peru, as well as elsewhere in South America. Those who had first landed at Havana or elsewhere in the West Indies, probably encountered cacti there,[3] and appear to have transported the term *pitaya* with them from there to Mexico. In spite of a well-developed cactus flora, the Caribbean lacks the profusion of species found in Mexico. Indeed, throughout the world, cacti came to be associated with Mexico, even though several other countries are home to many dozens of species. Mexicans are as familiar with cacti as North Americans are with maples and oaks. Most Mexicans readily recognize such popular names for cacti as

biznaga (barrel cactus), *nopal* (prickly pear), *nopalitos* (cooked pads of prickly pear), *pitaya* (fruits of columnar cacti), and *tunas* (fruits of the prickly pear). Even today, Mexicans identify *tunas* as readily as North Americans identify apples, and vendors hawk them at urban intersections and in fruit stands along highways throughout the republic. The conquistadores, though they often viewed American social and technical achievements with contempt, were justifiably impressed by the variety of uses of the cacti and the importance of the plants to American cultures, especially those of New Spain.

And well they should have been. The prickly pear alone produces peerless fruits (*tunas*), edible branches or pads (more accurately referred to as *cladodes*), (*pencas* in Spanish), called *nopalitos* when cooked. Prickly pear sap, or mucilage, is an important additive in constructing buildings. When mixed with lime it helps whitewash and plaster adhere to adobe. The sap has a gelatinous consistency and can even function as a lubricant. Parts of the plant—flowers, fruit, flesh, and roots, but most of all the pads and the sap, are routinely used in popular medicine in Mexico. These products show up as pills, gel, syrup, capsules, and powder and are just as commonly used as healing agents and for miscellaneous maladies as aspirin in the United States. Numerous peer-reviewed articles document the efficacy of *nopalitos* as a source of dietary fiber, in lowering blood pressure, and in treating diabetes.[4] Pre-Columbian medical practitioners were fluent in the use of the *nopal* and *tunas* in treating various human disorders. The Aztec King Axayacatzin derived considerable pleasure anointing his concubines with the "slippery pad of the nopal."[5] The mucilage must have constituted a most satisfying massage oil.

Finally, the prickly pear pads are the source of the brilliant red dye called cochineal (*grano de cochinilla* in Spanish). This latter is not part of a cactus, but is derived from colonies of parasitic scale insects (*Dactylopius coccus*) that take up residence on the pads.

Other genera of cacti supplement the virtues of the prickly pears (*Opuntia*). A few species of columnar cacti were (and still are) valuable sources of lumber, at times much to the detriment of the plants.[6] To add to cacti's virtues, the fruits of several species produce juice quite worthy of fermentation into wine.[7] The fruits of others make a powerful dye and food coloring.[8] From the pressed flesh of the *malinche* (*Pachycereus marginatus*) comes a popular shampoo said to prevent graying of hair and to restore the natural black color of matured locks.

Most important for some peoples of northwest Mexico were (and still are) the profoundly brilliant hallucinations engendered by consumption of the diminutive *peyote* cactus (*Lophophora williamsii*) in Mexico and in South America by the drinking a liquid derived from the columnar San Pedro Cactus (*Echinopsis pachanoi*).

Archaeological studies of fiber remnants in caves in the Valley of Tehuacán and in Oaxaca demonstrate that cactus fruits were part of the diet of indigenous Mesoamericans at least 9,000 years ago, perhaps as long as 12,000 years ago, as revealed by fossilized *quids* (cellulose residue spat out after the fruits have been chewed and the juices sucked away) and residual seeds.[9] Native Americans continue to include cactus fruits in their diets as far north as Oregon. All cactus fruits are edible, though some are bland and tasteless, a few are sour, and others turn out to be more trouble than they are worth. Some are tastier than others, especially those of the genus *Stenocereus*, the *pitayas*. The O'odham of Arizona consider the buds of a cholla (*Cylindropuntia*) to be an important vegetable, while Popolocan people of the Valley of Zapotitlán in Puebla consider the flowers of several species (especially those of the *tetecho*, *Neobuxbaumia tetetzo*) to be a

delicacy, while many fruits are the principal component in sauces, preserves, and even *paletas* (popsicles). In general, the stems and branches are inedible, since the flesh of most cacti is high in oxalates, which renders the flesh bitter and unpalatable. Only the branches of prickly pear are in themselves edible.

There are exceptions. Centuries ago natives discovered that the flesh of two species of barrel cactus of central Mexico (*Echinocactus platyacanthus*, *Ferocactus hystrix*), when steeped in sugar or honey, yields a popular tasty sweet now called *dulce de biznaga*. While natives of the Caribbean long ago learned to make a stew from the branches of the *kadushi* (*Cereus repandus*), exercising great care to remove all the spines and the green cuticle as well. Whether or not the *kadushi* was a dietary mainstay in pre-Columbian times is impossible to determine.

Cacti are of tropical origin. Plants of more northerly distribution, growing in cooler and cold deserts of temperate zones of North America, tend to decrease in size, thus presenting less surface area subject to frost damage. Their variety also diminishes rapidly north of about 34 degrees latitude in the Sonoran Desert, and 30 degrees north latitude east of the Continental Divide. Still, cacti grow wild in all 48 states of the continental United States and in Alberta and British Columbia in Canada, and have been introduced into Hawaii. They decidedly prefer arid and semiarid warm climates.

Mexico is the center of cactus diversity, with roughly 900 species, nearly half the species in the family. Ninety species appear in one complex valley—the Valle de Tehuacán/Cuicatlán of the states of Puebla and Oaxaca. Some northern states in the United States have but one or two species, but southwest Texas is especially rich in species diversity.

Cacti are especially well adapted to desert and semi-desert conditions, especially those found in the uplands of southern Mexico. They have special physiological mechanisms to make them efficient users of sunlight[10] and also incorporate special anatomical structures that help them withstand Mexico's long dry seasons and droughts as well. Unlike food grains and most fruit crops, cacti flourish in soils low in nutrients and on rocky hillsides unsuitable for grain agriculture, and many of them welcome the high temperatures of such torrid and dry valleys as the Valle de Tehuacán in Puebla and the great Balsas depression of southwest Mexico. Contemporary farmers in the Sayula Basin of Jalisco have converted former *milpas* (rainfed cornfields) into *pitaya* orchards, planting thousands of cacti known as *pitayo de Querétaro* (*Stenocereus queretaroensis*). In contrast with traditional crops, the orchards require no soil amendments or agricultural chemicals (and considerably less fencing: cattle usually leave cacti alone). Indeed, farmers warn that production of fruits may be compromised if the plants *are* fertilized. Farmers are expanding orchards of other *Stenocereus* species in the states of Oaxaca and Puebla. They have discovered that planting cuttings from select *Stenocereus* species[11] may help reestablish agricultural productivity in lands highly eroded and stripped of topsoil after centuries of overgrazing and exhaustion by equally long use as *milpas*.

Pre-Columbian peoples found cacti of such immense practical significance that they elevated them into cultural icons. After all, without any human intervention, wild cactus plants yielded an abundance of fruits, while corn, though of immeasurable importance, was totally dependent on human industry to produce kernels. The Aztecs were the most notable in exalting a cactus. Their capital Tenochtitlán means "rocky place of the cactus," (*nochtli* = cactus) and the Aztecs symbolized their empire with the emblem of an eagle perched in a prickly pear. Not just any old plant would do. The iconic significance of the *nopal* for the Mexica (as their god instructed them to call themselves) is a

clue to the importance of the plant. Tree-sized *nopales* are probably the single most common landscape plant in Mesoamerica.

At the height of their imperial powers, Aztecs derived much pleasure in contrasting their sumptuous civilization with their supposedly barbarian ancestry. The official Aztec chronology described them as wandering savages who arrived in the Valley of Mexico from the north and west. Based on that official mythology,[12] the Codex Chimalpopoca describes their brutish way of life: "[When they arrived in the Valley of Mexico] they were hunters on the move. They had no houses, no lands, no clothes that were soft goods. They just wore hides and long moss. And their children were brought up in mesh bags and packbaskets. They ate large prickly pears, barrel cactus, spine silk, sour prickly pears."[13] The implication of this passage is that eating the wild cacti made the Aztecs a strong people, worthy of founding an empire.

Indigenous Mexicans with less historical influence also raised cacti to iconic significance. For the Tohono O'odham of northwestern Sonora and southwestern Arizona, the saguaro cactus constitutes their most important plant, so much so that their calendar revolves around the plant's annual reproductive cycle.[14] When the first fruits are gathered (in July) the O'odham celebrate with a rain festival, which for them begins the new year. Seris of the Sonoran coast of the Sea of Cortés bury the placenta of a newborn child at the base of a *sahueso* (*Pachycereus pringlei*), the massive columnar cactus of the Sonoran Desert. Thereafter throughout the infant's life and even afterwards he or she is associated with that particular plant.

Two thousand kilometers to the south of the Seri, the Cuicatecan peoples of Oaxaca developed a special relationship with the world's largest cactus, *Pachycereus weberi*, the *candelabro* or *chico*, as it is whimsically called.[15] Cuicatecos, inhabiting a semiarid, tropical valley rich in fruits and produce, had their own civilization in the Cañada Chica of northern Oaxaca, where they functioned as a buffer between expanding empires to the north and Zapotecs to the south. The Zapotecs conquered them in the first century B.C., reducing Cuicatlán to a vassal state. At Quiotepec the Zapotecs constructed a defensive fortress, a structure that underscores the strategic military importance of the valley.[16] Quiotepec Canyon also happens to house the tallest examples of *P. weberi*, some of the largest cacti in the world. Today a mural on a wall facing the normally quiet plaza of San Juan Bautista Cuicatlán pays homage to the great cactus and its role as an icon to the Cuicatecos, providing them with shade, food, lumber, and wine.

To the south, in the central valley of Oaxaca, the modest columnar cactus *tunillo* (*Stenocereus treleasei*), which appears prominently in villages and pasturelands, is probably a purely domesticated plant. Its anatomy and genetic makeup suggest it evolved from carefully selected *Stenocereus stellatus* plants over the millennia, a result of Zapotecan agronomy. It is unknown in the wild[17] and its height appears to be limited to three meters, making it a dwarf plant, and the fruits, which grow at the tips of the branches, easily accessible to the harvester. To the northwest, the Popolocans of the semiarid Valley of Zapotitlán of Puebla still retain a close relationship with the giant *tetecho* (*Neobuxbaumia tetetzo*) whose buds, flowers, and fruits were dietary basics, and whose lumber provided beams and posts for their dwellings.

For other native peoples, cacti became indispensable, especially in arid and semi-arid regions where rainfall was insufficient or unreliable for raising corn and beans. Wild cacti were (and are) a reliable source of fruit and seed (excellent sources of protein and oil), and semi-domesticated varieties represent important horticultural crops. Miguel del

Barco, an eighteenth century Jesuit missionary in Baja California, fumed about the natives' fondness for the *pitayas*, fruits of the organ pipe cactus (*Stenocereus thurberi*):

> "In the immediate vicinity of our camp were many of the tart pitaya, the only thing that, throughout the Californias, might be termed a luxury. These were coveted by the Indians; no matter what orders were issued by the captains, and, despite all I could say, they would not restrain themselves. Whenever they went out, hatchet in hand, after wood, or sought water or anything else, they invariably strayed away. So irremediable was this evil that it was a strong temptation to wish that the Californians had never acquired this habit."[18]

The organ pipe fruits, which are more than 90 percent water, provided the Indians with enough moisture that during the fruiting seasons they expanded their range of hunting and gathering in arid Baja California, relying exclusively on water garnered from the fruits.[19]

The prickly pear cactus seems best to symbolize the extensive role that cacti play in Mesoamerica. The Aztecs elevated it to sacred status: according to their official history, the Aztec god Huitzilopochtli spoke to one of their leaders in a dream, instructing him that the Aztecs must wander through the world until they came upon a large *nopal* in the freshness of morning with an eagle perched upon it, sunning its outstretched wings. According to his orders, they would call that place Tenochtitlán, the place of the prickly pear on a rock. When the Aztecs found the *nopal*, it was on a rock outcropping deep within the great swamps of Lake Texcoco, land belonging to hostile neighbors to the west and not an obviously auspicious place in which to found a great empire. But the god had spoken and thus the Aztecs explained the founding of their great capital city, now only a small fraction of Mexico City. The sixteenth century Dominican Friar and historian Diego Durán reported that the eagle held a splendidly feathered bird in its beak,[20] while other later traditions picture the eagle holding a serpent, the current Mexican icon. All versions agree that the eagle was perched on a *nopal*.

The earliest European adventurers took cacti, principally prickly pears, with them on their return to Europe. Initially, the plants served as souvenirs, mementos of the strange and wonderful newly described lands across the Atlantic. (To a great extent they still are, for many hundreds of European collectors have become incorrigible victims of *cactophily*, the inordinate fondness for cacti, a craze that equally affects collectors in Japan.) Before long, however, the virtues of prickly pear cacti as fruit producers became evident and the plants were introduced to the Mediterranean region where they were raised for their *tunas*. By the nineteenth century, *tunas* (called cactus pears in Europe) had become a commercially important crop in Italy and North Africa and remain so.[21] The consumption of *nopalitos*, dietarily important in Mexico, has never caught on elsewhere.

In addition to their many domestic virtues, prickly pears are disarmingly simple to propagate, a fact not lost on pre-Columbian Mesoamericans. One simply lops off a *cladode* (pad), allows it to dry for a fortnight, and then sticks it in the ground. If the soil is in any way conducive to plant growth, the pad will quickly take root. Assuming some rainfall or irrigation, within weeks new growth appears along the margins of the pads, both flower buds and new branches sprouting forth. Spaniards also discovered to their delight (and wonder) that the pads of prickly pears and other *Opuntias* could be lopped off and fed to livestock as a nutritious food. Burros, cows, and mules slowly learned that even the savagely spiny *chollas* (*Cylindropuntia*), close relatives of the prickly pears, could be relied on for nourishment during annual droughts, even more so in years of little rainfall. Cattle,

mules, and burros seem largely unfazed by the spines and *glochids*. Goats, however, only nibble at the plants under duress, and horses avoid them altogether.

Tunas remain a hugely important crop in Mexico, where markets throughout the country make them available during their season. In the year 2000 Mexican production exceeded 345,000 tons,[22] or roughly three billion fruits, mostly for domestic consumption.

Cochineal, although the product of a domesticated animal (an insect rather than a cactus), exists thanks to the prickly pear cactus. Colonies of the scale insects will reproduce on most prickly pear species and even on some *chollas* (*Cylindropuntias*), but *Dactylopius* especially prefers the cultivated *Opuntia ficus-indica* prickly pear as a host, where the females spin their silky protective coverings. Long before Europeans expressed wonder over the brilliance of fabric dyed with cochineal, peoples of Mesoamerica had developed a robust industry and trade in the dye. While most early-arriving Spaniards lusted after precious metals, nearly as many people made (lesser) fortunes producing and exporting the dazzling red dye to Europe, where it surpassed any other known red for brilliance and permanence. Spain, ever alert to maximizing revenues for the Crown, established a cochineal monopoly and carefully guarded the cochineal trade. Export officials remained ever vigilant in their attempts to prevent exportation of the *Dactylopius* insects from New Spain. Their labors were in vain, for the female insects that produce the carminic acid responsible for the scarlet hue are only a quarter inch long and are so easily concealable that even the most fastidious inspector would be flummoxed by a clever smuggler. In fact, French entrepreneurs smuggled out insects to Haiti and hence to Europe in the early eighteenth century, apparently then selling vast quantities of the dye to England, where the brilliant red seemed the ideal color for English military uniforms and made them easy targets for colonial American bullets. Thereafter both Guatemala and the Canary Islands became exporters of cochineal. The number of products now containing the dye seem endless, notably paints, dyes, lipsticks, and a replacement for aniline dyes in foodstuffs and soft drinks. Most prepared foods of reddish hue contain cochineal as a dye, though some researchers caution that children may be allergic to cochineal. Around the middle of the nineteenth century cheap synthetic aniline dyes nearly matched cochineal in saturation, hue, and permanence, and the market for the natural product plummeted.

The cochineal industry was already well developed at the time of the Spanish arrival in the Americas.[23] Spaniards were dazzled by the abundance of artifacts painted with cochineal, including fabrics and personal adornments, baskets, ceramics, and paintings. Tradition has it (apparently well-authenticated) that the exterior walls of the principal monuments at the Zapotecan archaeological site of Monte Albán, Oaxaca, were painted with cochineal of such brilliant purity that the red color would have been visible from the moon. Pre-Aztec murals visible today, such as the elaborate friezes recently excavated at Cacaxtla, Tlaxcala, are dominated by varying shades of red, all derived from cochineal. The classic pre-Columbian parchment codices, most of which were burnt by orders of the Inquisition, were inscribed and illustrated primarily with cochineal. Throughout central Mexico into Guatemala, but especially in the state of Oaxaca, cochineal specialists preserved their encyclopedic knowledge of the life cycle of the insects and techniques of cochineal husbandry, including the mordants necessary to fix the dye onto cotton.[24] (The fixatives were unnecessary in highland South America, since the wool of cameloids is far more receptive to the dyes than is cotton. In the lowlands where cotton was the primary fiber, fixatives would have been required.) During Aztec times captive nations (most of Mesoamerican states or statelets) shipped large volumes of the dye and dyed

textiles to Tenochtitlán as part of annual tribute to the Aztec lords. One record documents a levy of 9,750 pounds annually on the Mixteco city-states of Coixlahuaca and Tlaxiaco in Oaxaca.[25]

The Spaniards merely replaced the Aztecs as overlords of production, but vastly increased the required amounts as a red-starved Europe awaited the vibrant color. Oaxaca alone produced more than one million pounds of the dye on ten occasions between 1760 and 1782. Production exceeded one and a half million pounds in Guatemala in 1854.[26] (The amount consumed by the English army for producing red coats for its officers and later for its troops must have constituted a goodly percentage of the former amount.)

Despite the replacement of labor-intensive cochineal with cheap synthetic dyes on the international market, small-scale production of cochineal continues in Oaxaca, where a stable number of traditional weavers still employ the dye. Differing procedures of harvesting, processing the insects, and treating the larvae yield a variety of hues ranging from the most brilliant and enduring scarlet conceivable to purple to indigo to orange. In the traditional Zapotecan community of Teotitlán del Valle a number of families persist in incorporating cochineal and other natural dyes into their textiles, which have become the most popular fine weavings in Mexico. Peru, nevertheless, now greatly exceeds Mexico as the world's largest producer of cochineal.

For Mesoamericans, columnar cacti ranked second in importance to prickly pears, especially those of the genus *Stenocereus*, the *pitayos*. Fruits (*pitayas*) from these plants seem uniformly juicy and sweet and stand out in a family renowned for the excellence of its harvests. No fewer than ten species of *Stenocereus* produce superior fruits. Red is the predominant color of *pitaya* pulp, but white, purple, yellow, and orange frequently show up in gatherers' buckets. In Oaxaca, the widely planted *pitayo de mayo* (*Stenocereus pruinosus*) yields baseball-sized fruits of unmatched sweetness in late spring. Another species, the *xoconochtli* (*Stenocereus stellatus*) yields fruits on the piquant side, as its name (xoco = sour) indicates. Still, the fruits are popular and the plants appear widely in cactus orchards, intermingled with species yielding sweeter fruits, especially *S. pruinosus*. The *xoconochtli* often produces two crops annually. In the Balsas Basin of Guerrero and Michoacán, three additional species of *pitaya*-producing plants[27] stagger fruit production over much of the spring and summer.

The pulp of *pitayas* certainly ranks high among the world's most succulent fruits. They are delicate (easily bruised or otherwise damaged) and perishable, so much so that they must be consumed within the same day as they are collected or they begin to ferment and rot. The speed of their deterioration after harvesting explains why they have never expanded out of a limited regional market, unlike *tunas*, which are easily shipped and have a far longer shelf life. On the other hand, as natives have known for millennia, when the fruits are ripe they easily shed their spines, making harvesting far less hazardous. Wild *pitayos*, as the plants are called, grow only sporadically at the elevation of Mexico City, and the difficulty of transporting the fruits from lower elevations explains why the Aztecs do not seem to commemorate them in their literature. Today trucks rush the fruits to the capital from the valleys of Puebla and Oaxaca and residents snatch them up.

Mexicans learned many centuries ago that some species of columnar cacti planted closely side by side would yield impressive fencing. They were unconcerned about penning in domestic livestock, since they had none, but boundaries were a different thing and the living fences constructed from cacti presented power symbols of individual or

class-defined spaces. At least six species of cacti are popular for constructing living fences. In central Mexico the straight stalks of the Mexican Fence Cactus, *Pachycereus margina-tus*, can be planted so closely together that when the plants mature there is no interven-ing space. The tall trunks and their spines effectively block forward progress of interlopers. Another species, the *baboso* (*Pachycereus hollianus*) of the Valley of Tehuacán, also straight and single-stalked, possesses a lengthy (two inch) central spine projecting from each *areole* (the cushiony structures from which spines radiate) inclined at a downward angle that constitutes a lethal deterrent to the most ornery of cattle, goats, or pack animals. Such boundary markers have the additional virtue of producing edible fruits, something barbed wire has never achieved.

If the Spaniards were cautiously enthusiastic about prickly pears and *pitayas*, and came to use columnar cacti to enclose their livestock, they were decidedly skeptical about *peyote* (*Lophophora williamsii*. *Peyote* (an Aztec name) plants are best described as buttons. The plants are low growing, diminutive, nondescript, spineless cacti, seldom as big as a hockey puck and often well camouflaged into their background. Their flowers are a delicate lav-ender/pink. Though its habitat is restricted to the deserts of north central Mexico into southwest Texas (prospering especially in western San Luis Potosí and never reaching the heavily populated south), *peyote* filled a vitally important cosmopolitan niche: it became the spiritual drug of choice for Mesoamerica. So despite its northern habitat in the Gran Chichimeca, many weeks journey from Tenochtitlán, peyote's hallucinogenic properties were celebrated throughout much of Mexico long before the arrival of Spaniards and the dried plant material reached as far south as Oaxaca.[28] The campaigns of forced conver-sions to Catholicism imposed on indigenous peoples of peyote country produced flexible compromises among the Indians. They simply incorporated the Catholic saints into their religious practices, at times identifying the use of *peyote* with the Virgin Mary. In one notable case in Zacatecas, well within the boundaries of *peyote* territory, authorities wrote that the Indians referred to *peyote* as "Yerba María."[29]

Peyote must have been well-known and widely used, for it quickly attracted the notice of the priests and their superiors, who just as quickly added it to the list of banned sub-stances and sought to eradicate its use. It took only 50 years of Catholic presence in New Spain for the Inquisition to pronounce the use of *peyote* as heresy, and thus it came in 1571 to forbid the ingestion of the plant,[30] hoping to extirpate its use as a spiritual phe-nomenon in direct competition with their own practices. The new policy must have proved confusing to natives who observed the Spaniards' fondness for wine and brandy, both of which produced socially embarrassing altered states of consciousness. Traditionally a religious icon of the Huichol of Jalisco and Nayarit, Huicholes of Nayarit then and now made annual pilgrimages to the vast arid plains of San Luis Potosí to gather the buttons and distribute them among themselves and, apparently, on the international market. Padre Andrés Pérez de Ribas, writing in 1645 of his experiences as a missionary in the Northwest of New Spain, noted the use of *peyote* among the (now extinct) Acaxee of southwestern Durango. He wrote that: "…Even though this root is medicinal, its use involves many superstitions, which the Holy Tribunal of the Inquisition sometimes has to punish."[31]

Under the powerful spell of *peyote*-induced visions, native shamans gained insight into advising their leaders and making prophecies, ultimately emerging from the trances with-out the slightest lingering effect. While *peyote* unquestionably induces potent hallucina-tions and emotions, fears that it might become addictive are groundless, as are the legion of laws prohibiting its use. Though the buttons are unquestionably hallucinogenic,

ingestion of peyote is notorious for producing powerful and sometimes prolonged nausea and vomiting, and the onset of the alteration of consciousness may require several hours. Only those seriously seeking spiritual advancement would tolerate the plants' nasty (but utterly temporary) side effects. It will never become a drug with widespread recreational use.

A further group of cacti of importance to Mesoamericans were the barrel cacti—the genera *Echinocactus* and *Ferocactus*. The seeds of their waxy fruits are edible and in some areas are ground into a meal and made into tortillas. Their use at the time of Conquest is more intriguing. In Tlaxcala (home of allies to the invading Spaniards) at least two low stone monoliths of pre-Columbian provenance bear a stylized representation of a massive barrel cactus. One of these appears to have been a site for the ritual grinding of corn (or *biznaga* seeds), the other an altar where human victims were sacrificed, surrendering their hearts to Huitzilopochtli by means of an obsidian blade.[32] The symbolic significance of the barrel cactus has yet to be deciphered.

An additional cactus of curious and ancient popularity is *Hylocereus undatus*, the *pitahaya*.[33] It grows in abundance in tropical regions of the coastal lowlands along the Gulf of Mexico and the Caribbean and well into lower elevation interior of Mexico. Spaniards probably became familiar with it before they arrived in Mexico and must have been impressed that such a satisfying fruit was available just for the plucking. A viney, quick-growing epiphytic cactus with aerial roots, vast numbers of *H. undatus* engulf trees, walls, and even roofs, thriving in warm, humid climates. It is hardly a pest, for its three-sided branches are brilliant emerald-green in color and the plants produce lasciviously attractive 30 cm-wide white flowers with numerous yellow sepals. Even more important, its fruits achieve a weight of one-third to one-half pound. Scaly, but free of spines, the pinkish husks of the fruits conceal white pulp with numerous tiny black seeds. The flavor is delicately sweet and the pulp is not runny, as is the case with some *pitayas*. So popular have the fruits become that plants have been exported to southeast Asia, where they are now marketed—and exported—in large numbers under the name of Dragon Fruit.

Notes

1 The Southwest Center, the University of Arizona.
2 David Hunt in his generally authoritative publication *The New Cactus Lexicon*, (2006. Text, p. 5. The Manse, England: dh Books), arrives at a total of 1,816 species of cacti. Since cactus taxonomy inspires warlike contention among pretenders, this figure satisfies no taxonomist besides Hunt, but is as accurate as any available and I use it here. I have documented at least three additional undescribed cactus species in Mexico (Yetman 2007).
3 Nearly all Caribbean islands and southern Florida feature cacti and some in enormous numbers. Extreme southeastern Cuba and the Dutch Antilles (Aruba, Bonaire, and Curaçao) have veritable forests of large cacti.
4 Sáenz-Hernández et al. 2002: 218–219.
5 *Codex Chimalpopoca* 55: 35. (Bierhorst: 1992: 113)
6 Lumber sources include *Neobuxbaumia mezcalaensis, N. tetecho, Pachycereus pecten-aboriginum, P. weberi, Stenocereus montanus, S. quevedonis*, and *S. thurberi*. See Yetman 2007.
7 The popular and widely-brewed beverage *pulque* of the highlands of south-central Mexico is the fermented juice (called *aguamiel*) of the agave (*Agave salmiana*). Although agaves are succulents and sport potent spines, they are not cacti. They are closely related to lilies. Cactus fruits used as a primary ingredient for wine include those of *Myrtillocactus geometrizans and Pachycereus weberi*.

8 *Polaskia chende* of southwestern Puebla.

9 Casas and Barbera 2002: 146.

10 Most adult cacti incorporate CAM (Crassulacean acid metabolism) for converting carbon dioxide into organic acids, and hence producing new growth tissue. CAM plants close their stomata (respiration pores) during the day and open them at night, whereas non-CAM plants maintain their stomata open during the sunlight hours.

11 Specifically, *S. pruinosus* and *S. stellatus*. I have read of reports of orchard plantings of *S. griseus* but have not verified them.

12 Somewhere around the year 1430 the Aztec king Itzcoatl ordered all historical manuscripts burned and replaced by an official version of history, one that exalted the god Huitzilopochtli. "The history of it was burned when Itzcoatl ruled in Mexico. They said 'It is not necessary for all the common people to know of the writings; government will be defamed, and this will only spread sorcery in the land; for it containeth many falsehoods.'" (Sahagún, *Florentine Codex* 10: 191).

13 *Codex Chimalpopoca* 1: 44 (Bierhorst 1992: 24.)

14 Crosswhite 1980.

15 I have been unable to ascertain the vernacular name of *P. weberi* in the Cuicateco language, though its name in Mexicano (Aztecs conquered the region in about 1460) is *techananochtli*. In general I have noticed that the more useful cacti tend to retain their indigenous name.

16 Marcus and Flannery 2000: 385.

17 Cornejo 1994; Yetman 2007: 92.

18 Miguel del Barco 1980: 149.

19 Hodgson 2001:142.

20 Duran 2002: 41–44.

21 Inglese et al. 2002:164–165.

22 Inglese et al. 2002: 164.

23 Cochineal dyeing was also well advanced in pre-Incan Peru. See Sáenz-Hernández et al. 2002: 222.

24 Donkin 1977: 20.

25 *Ibid*. 21.

26 *Ibid*. 29, 31.

27 *S. chrysocarpus*, *S. friçii*, and *S. quevedonis*.

28 Aguirre Beltrán 1963: 143.

29 *Ibid*.: 147–148.

30 Anderson 2001: 44.

31 Pérez de Ribas 1999: 504.

32 Bravo Hollis 1978: 12

33 Pronounced pi ta HAH yah in violation of Spanish language rules that dictate that the "h" will be silent.

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PART II

The Indigenous World Before the Europeans

The Gods Depart: Riddles
of the Rise, Fall, and Regeneration
# of Mesoamerica's Indigenous Societies

SUSAN KELLOGG

"If this is a history class, why do I have to learn about archaeology?" This is a common student question at the start of any colonial Mexico history class. The general answer is that prehispanic peoples are a part of that history; their cultures and civilizations shaped Spanish exploration, conquest, and governance in the post-conquest era and after. There are also some specific answers: first, the environments that Spaniards found had already been shaped in profound ways by native peoples; they were differentiated in terms of ethnicity, class, and gender, and indigenous forms of difference influenced the development of colonial society. The cultures and civilizations encountered by Spaniards were themselves the products of thousands of years of development and change, their own *longue dureé*, a point first made by Eric Wolf in his classic 1959 book, *Sons of the Shaking Earth*.

This chapter treats the history of Mesoamerica's indigenous peoples before 1519. Drawing on both archaeological and ethnohistoric investigation by a multitude of scholars, it dispenses with a concept often used to describe this long period time, that of "prehistory" (defined as the period before the appearance of writing), since writing was an ancient practice made use of by many indigenous groups.[1] The chapter draws especially on recent archaeological writings and argues that several fundamental characteristics of prehispanic political economy and spirituality developed early and became highly elaborated by the time Spaniards arrived. Archaeologists have developed very sophisticated research techniques and modes of analysis in which material and textual data have become more fully integrated than ever before, paid more attention to gender, and promulgated additional models for conceptualizing relationships among the regions that constitute Mesoamerica, especially the idea of "world systems." Before examining indigenous societies and civilizations in detail, both the region and the methods by which archaeologists and ethnohistorians carry out their studies need consideration.

What is Mesoamerica and How is its Pre-encounter Past Studied?

Mexico constitutes part of what archaeologists and anthropologists call a "culture area," a large geographic region constituted by societies more similar to each other than they are to those beyond it. Another way to think of culture areas, since these are by definition, large, environmentally and culturally diverse regions, is to observe that "whatever happened of importance in one area [of Mesoamerica] sooner or later had some effect on most of the other areas."[2] Geographically, Mesoamerica consists of most of what is present day Mexico, Guatemala, and Belize, along with parts of Honduras and El Salvador.

As Mesoamerican archaeology began to be delineated as a discrete topic of study, the area was defined by the presence of "cultural traits." Included among these were a diet relying heavily on the domesticated plants corn, beans, and squash; common practices of religious ritual, including worship at monumental buildings constructed as part of ceremonial centers linked to the use of a 260-day ritual and 365-day solar calendar; and economies based on tribute, trade, and market exchange.[3] These traits were thought to spread through migration, conquest, or ill-defined processes of diffusion. Contemporary archaeologists concentrate much less on traits and much more on commercial, political, artistic, and religious interactions. What differentiates the study of Mesoamerica *before* the arrival of Europeans from its study *after* their arrival is that investigations of the earlier period depend heavily on the examination of material remains, only some of which use writing to convey information. Because they have comparatively less access to the voices of a variety of human actors, archaeologists use very different research methods to reconstruct the distant past.

These research methods include the collection of data through fieldwork, analysis of that data, and the creation or testing of theory. The techniques upon which archaeologists depend to collect data include survey (to locate artifacts and features—for example, settlements or buildings) and excavation (which provides information about artifacts and features under the surface). The vertical and horizontal positioning of remains on and below the ground proves critical for analyzing chronology and function. Based on these methods C14 dates can be assigned (this is a method of dating the approximate age of archaeological materials by measuring the decay of radioactive carbon-14 which exists in all living things), maps can be made, stone tools and pottery can be analyzed, as can art and writing. These broad examples illustrate only a few of the types of analysis that archaeologists have used to study ancient Mesoamerican societies.

From Peopling to the Preclassic Period

This section provides an overview of the chronology that archaeologists use to describe the early history of human occupation and cultural development prior to the arrival of Europeans, starting with the first appearance of people in the Americas more broadly, then Mesoamerica more specifically, and discusses cultural developments through the rise and influence of Mesoamerica's first civilization, the Olmecs. Archaeologists use a terminology to describe broad periods of time, or stages, during which some characteristics thought to be common to most, if not all, the cultures of that period are displayed. These stages include the Paleoindian, Archaic, Preclassic, Classic, and Postclassic periods. This schema reflects the evolutionary thinking that shaped early archaeology, but contemporary archaeologists use the terms to organize their chronologies and make fewer assumptions about stages of development.[4]

Men and women did not evolve in the Americas; they arrived there in small bands of hunter-gatherers from northeast Asia, somewhere between about 35,000 and 12,500 years ago during the *Paleoindian* period.[5] Once there, these stone tool users spread throughout the Americas, north to south, east to west. Evidence of the earliest Mesoamericans comes from the Valsequillo Reservoir, near the modern city of Puebla, Mexico and dates to approximately 22,000 years ago.[6] The mobility and simple technologies of these early Mesoamerican people, the latter probably based on often using materials that did not survive into the modern era of archaeological practice, make tracing their movements and settlement patterns extraordinarily difficult. By 12,000 years ago, stone tool technology and skill at hunting big game reached their height throughout the Americas, including Mesoamerica, where sites indicating large mammal hunting have been found, especially in central Mexico. Mesoamericans of this period ate a variety of plants and small animals in addition to large game.[7] By 7000 BC, Mesoamerican foragers relied still more heavily on wild plants and smaller animals, a shift in ecology and economy that would have very significant consequences.[8]

The *Archaic* began at 7000 BC and lasted until 1500 BC. During this period Mesoamericans domesticated a variety of plants and animals, a development that would ultimately be accompanied by a shift from a mobile hunting way of life to one of permanent, settled villages in many areas of Mesoamerica. Corn, beans, and squash all became domesticated during this period, but there is controversy over the date of the domestication of corn which appears to have taken place either around 5000 BC or 3000 BC. There is some evidence that women played an important role in the domestication process due to their roles as foragers and food preparers.[9] Bean and squash domestication took place earlier, but corn would eventually become the basis for Mesoamerican diets.[10] By the end of this period, small villages existed, with individuals producing pottery and carrying out interregional exchange. Such exchanges eventually underwrote further cultural development in the form of status differentiation within some Mesoamerican societies and intergroup alliance and competition within and across regions.

While such changes may have their origins in the late Archaic, some of the societies of the next period, the *Preclassic* (or *Formative* as it is also sometimes known), from 1500 BC to AD 150), would see them elaborated in truly transformational ways. By the end of this period, many characteristic Mesoamerican beliefs and practices had been formulated, and peoples ancestral to those encountered by the Spanish had come into existence. Most attention has gone to the Olmec civilization of the Gulf Coast region of Mexico of southern Veracruz and Tabasco of today's Mexico.

The Olmecs represent the earliest "civilization" of Mesoamerica. Their sites, including such places as San Lorenzo, La Venta, and Tres Zapotes, provide evidence of the development of a class structure, with elites able to command the labor and loyalty of perhaps thousands of followers. What these people called themselves we do not know, nor do we know what language they spoke.[11] We do know they built ceremonial centers, which were towns (if not cities); made efficient use of the prodigious agricultural production possible in the low-lying, riverine, plant-rich area in which they lived; and practiced war, trade, and diplomacy within and beyond their heartland region.[12]

The Olmec people are best known for their naturalistic yet difficult to decipher art and iconography. Worshippers of a number of deities, including some with clear links to deities associated with later Mesoamerican peoples, their artists were supremely talented sculptors who produced the huge stone heads, carved columns known as stelae, altars, smaller sculptures, and figurines.[13] The stone for much of this cultural production came from areas outside the Olmec heartland, and related images can be found in these

far-flung regions. The were-jaguar (a deity who was represented with child-like features, a cleft head, almond-shaped eyes, and a downturned mouth), the "Olmec dragon," a maize deity, and perhaps a feathered serpent constitute some of the deity images found in Olmec art.[14] While some images clearly depict the polytheistic supernatural world of the Olmecs, others—large stone heads and jade masks—probably show individual rulers whose interests included a kind of ballgame, a politico-religious activity that would be practiced in many later cultures and regions.[15]

Although it has long been the predominant view that wherever Olmec-like art and iconography appear, such occurrences indicate Olmec influence, it may be that the use of this style "functioned on a local socio-religious level, rather than as markers of significant Gulf Coast relationships."[16] David Grove has argued that there is little to no evidence that this widespread Preclassic art style actually appeared first among the Olmecs, though they achieved a "greater aesthetic height by executing it on stone monuments."[17] Whether Olmecs did or did not originate a style symbolic of an elite strata that was expressing its identity and power in locally and regionally comprehensible ways (that is, whether they were or were not a "mother culture," as they were long described),[18] it remains the case that the oldest examples of Mesoamerican writing and calendrics were found within or near their area. The earliest Long Count date comes from the site, Chiapa de Corzo in Chiapas, just outside the Olmec heartland.[19] An undecipherable Olmec hieroglyphic text from the site of El Cascajal, Veracruz, dating to about 1000 to 900 BC and examples of Long Count dates on stone artifacts dating to the very late Preclassic (from 32 BC to AD 162) have also been discovered. During the next period, the centers of cultural development were found both to the north and south of the Olmec heartland. Spanning the years between AD 150 and 900, the Teotihuacanos, Zapotecs, and Mayas of the *Classic* would all build upon Preclassic social, political, and artistic foundations to create still more complex cultures and large-scale economic and political systems.

The Classic and the Epiclassic

During the late Preclassic the site of Teotihuacan, located in the northeastern sector of the Valley of Mexico, began to grow. By AD 1 much of the Valley's population had moved to the site, a fact that helps account for this city's explosive demographic and architectural growth.[20] Archaeologists do not understand exactly why this dramatic movement of population occurred, but this shift symbolizes the enigmatic nature of the site and the culture of its people, the so-called "Teotihuacanos." Designed by urban planners and builders extraordinaire, at the city's height it had a population of at least 120,000 (but probably more) and covered some 20 square kilometers, laid out on a grid pattern, with a distinctive east of north orientation.[21] Like the later Mexica capital city Tenochtitlan, it was laid out in quarters, oriented around the north–south Avenue of the Dead and an east–west avenue. The three most important structures at the site—the Pyramid of the Sun, the Pyramid of the Moon, and the Temple of Quetzalcoatl—are located at prominent points along these avenues.

The Pyramid of the Sun is a massive structure, some 700 feet long and 200 feet high and was begun late in the Preclassic. Early in the Classic, the Pyramid of the Moon, lying at the north end of the Street of the Dead, was built. While smaller than the Pyramid of the Sun, the two are extremely imposing architectural achievements and attest to the power of Teotihuacano elites to compel labor. While smaller in size, the Temple of

Quetzalcoatl was placed at the heart of the city where the two main avenues crossed. It is an elaborately decorated building with recurrent images of feathered serpents, warrior headdresses, and shells. Teotihuacanos sacrificed and burned captives near the pyramid which suggests that political violence was part of internal and external relations of Teotihuacan (as it was for other Classic-period cities).

Who built this city and its magnificent public buildings? The Teotihuacanos represent something of a mystery, often interpreted through the lens of the Postclassic Mexica people (discussed below) who admired and copied them and provided the names of the site and some of its features. While the Teotihuacanos may have been early Nahuas, ancestors to later Nahuatl-speaking people, including the Mexica, there is little evidence to suggest where the forebearers of the Teotihuacanos came from or the language they actually spoke.[22] Builders, traders, and purveyors of state power within and beyond the site, Teotihuacan's government shaped daily life in important ways, perhaps more so than at any other prehispanic site or civilization in Mesoamerica.

The power of Teotihuacan's ruling group was felt in a number of ways, including the housing in which the city's inhabitants lived. The city contained over 2,000 domestic structures known as apartment compounds, one-story, stone-walled units divided into sub-units of rooms, patios, and passageways. Each had its own particular plan, some larger, some smaller, but all were built sometime during the Early to Middle Classic, after the main avenues were laid out and pyramids built. Compounds may have been organized into wards based on a combination of kinship and craft or trade activities. Like the lay-out of the city, the compounds represent a deliberate effort to create a centrally conceived urban layout that shaped the lives of thousands of city inhabitants, influencing work, play, and religious activities.

The deities worshipped by Teotihuacanos have iconographic connections to those of both earlier and later civilizations. A sun god, rain god, and feather serpent deity were worshipped in homes, temples, and at the city's largest structures. Teotihuacanos also venerated a female water deity whom some scholars see as the supreme deity of this society.[23] The existence of creator, water, war, and vegetation deities would seem to clearly link the Teotihuacan belief system with that of the later Mexica people. One of the foremost archaeologists of Teotihuacan—René Millon—has analyzed some of the religious beliefs and iconography related to rulership at the site and considers the city to have been a "sacralized polity" in which religion, war, and governance were closely linked together.[24]

How governance, secular and sacred, was organized is not well understood. That the Teotihuacanos had a powerful government is evident, given its ability to compel movements of population and put labor to work. Whether it was also the center of an empire is not clear, but it certainly had trade and diplomatic relations with many other regions, particularly in southern Mesomerica. Teotihuacan goods and influence can be found at a number of Maya sites including Kaminaljuyu in highland Guatemala, about 650 miles southeast of Teotihuacan.[25] Obsidian blades manufactured at Teotihuacan were traded far and wide, and their ceramics can also be found in many areas, seemingly owned by elites who may have coveted these goods as symbols of their wealth, status, and power.

Between 650 and 750 the end came for Teotihuacan in dramatic fashion. Many of its main buildings—temples and apartment compounds—were destroyed through a combination of burning and smashing of objects associated with the buildings. Whether this was done by disaffected residents or invaders from the outside, or a combination of both, the state of Teotihuacan and its ruling group failed to survive. As the city was losing

much of its population, it became physically much smaller, no more apartment compounds were built, and its power and influence were as broken as many of its ceramics, sculptures, and fine art.

Elsewhere in Mesoamerica, as Teotihuacan was growing in size and political and economic importance, so were other civilizations, especially the Zapotec civilization in what is today the state of Oaxaca and the Maya civilization of the southern lowland Petén and Yucatán regions. These enduring peoples still exist today. Zapotec civilization arose in the former, Maya civilization in the latter. The Valley of Oaxaca, southeast of the Valley of Mexico, saw the beginnings of more complex, stratified societies during the Preclassic. The site of Monte Albán, which would become the capital of the Zapotecs (people known in their own language as Bènizaà), began to grow rapidly late in that period as the population shifted from villages in the valley to the hilltop settlement of Monte Albán, perhaps motivated by defensive needs. They began to build temples, a governing palace, a large ball court, as well as elaborate buried tombs, burial places of kings and other elites. At its height the city had a population of about 25,000. We know from images, writing, and calendrical records at the site (the Zapotecs were great writers; like the Maya discussed below, glyphs appear in many places, on many kinds of art) that the Zapotecs worshiped a deity of lightning, one of maize, a feathered serpent, a bat, and like the Teotihuacanos, a deity of fire, as well as perhaps a female water deity. Although they worshiped some deities similar to those of Teotihuacan, their pantheon as a whole differed.

The same might be said of the Zapotec–Teotihuacan relationship generally. The Zapotecs were certainly influenced by the Teotihuacanos, but Monte Albán was not a planned city, and its main plaza was far less accessible. While its art and architecture share some similarities with those of Teotihuacan, with similar iconographic elements and uses of murals as decoration within buildings, the former was a "controlled-access, fortified, religious, and regal administrative capital on a mountaintop, whereas Teotihuacán was a planned, accessible, unfortified, administrative, religious, and commercial city on an irrigated plain."[26]

The two cities had an important trade and diplomatic relationship. An enclave of Zapotecs lived at Teotihuacan in housing of Teotihuacan-form but maintained their own artistic and other cultural traditions. These Teotihuacan Zapotecs probably were traders and had a presence at Teotihuacan from early in the Classic period. Monte Albán art shows high levels of contact between elites of both cities, with carvings from Zapotec palaces depicting representatives from Teotihuacan meeting with Zapotec rulers, perhaps coming to agreement about matters of war, peace, and trade. Like Teotihuacan, Monte Albán declined in population and importance some fifty to a hundred years after Teotihuacan's own demise. The collapse of Monte Albán was more gradual, with no fire or other dramatic acts of destruction. By 800 it had lost much of its population and its public buildings fell into disuse and decline, though Zapotec culture did not die out.[27]

Along with the Zapotecs, the Maya are an enduring people. Their languages and cultures developed even before the Classic period and persist. Despite numerous obstacles, they thrive today. Mayas were and are distributed over a large area of southeastern Mesoamerica from the lowlands of Mexico's Yucatán Peninsula to the central Petén region of Guatemala and Belize, and on to highland areas of southern Mexico (mainly Chiapas) and Guatemala; western parts of El Salvador and Honduras are also part of the region to which they lay claim. While there are two geographic locations and environmental settings in which Maya culture developed, the lowlands (on which this chapter focuses) and highlands, much of their region consists of tropical rainforest and is less

diverse than the environments of other parts of Mesoamerica. This characteristic helps explain the broad uniformity of Maya culture across such a large area.

Historical linguistics suggests that the earliest Mayan language developed about 4000 years ago. Shortly thereafter the first Maya speakers began to plant maize and build permanent settlements began along the Pacific Coast of Chiapas (in Mexico), Guatemala, and El Salvador. By 1200 BC village life had begun in the Maya lowlands, but only after the decline of the Olmec did cultural developments that became the basis for Classic-period Maya civilization, take off. Maya architects and builders quickly recognized the utility of the huge supply of limestone throughout their area and began to build impressive temples, palaces, and platforms with highly decorated surfaces. Images of a creator bird deity, a maize god, and other important gods abound at late Preclassic sites. As the Classic Period began other characteristics of Maya civilization appeared, including use of Long Count dates, hieroglyphic writing, and the chronicling of the rise and fall of ruling dynasties. By AD 250 Maya Classic culture was flourishing throughout the lowlands.[28]

Maya hieroglyphic writing is extraordinarily informative about Maya history and ways of life during the Classic. Because the writing is preoccupied with the doings of the Maya ruling class "we have more, and more detailed, information about it than about the remaining 98 percent of commoners."[29] While the writing system is not completely understood, Maya epigraphers made great breakthroughs in deciphering a writing system which, like other early writing systems, is both pictorial and phonetic. During the Classic their writing was done on stone, and what epigraphers now know is that the inscriptions found on columns, walls, and sculptures were far more political and historical in nature than religious or philosophical as had been postulated by early archaeologists. The carved writings associated with particular city-states, tell us of rulers, their families, and the life cycle of the dynasties of which they were a part.

Historical in nature, the carvings are based in Maya conceptions of time as expressed through their calendrical system. The Maya shared with other Mesoamerican peoples the fifty-two-year Calendar Round (roughly equivalent to our century), consisting of two cycles, a 260-day ritual year and a 365-day solar year. Every fifty-two years the two calendars would begin anew on the same day (thus the term "Calendar Round"). Maya scribes carved dates from both calendars as part of the inscriptions on the stelae and other stone surfaces, but the most important dates of the Maya historical writings are the Long Count dates. These appear to be linear because they fix a precise date in time, in reality these dates—based on periods of 360 days (the *tun*, divided into 18 months, *winals*, divided into 20 days, or *k'ins*)—are "so as to express the number of days elapsed since the end of the last Great Cycle" which began on August 13, 3114 BC.[30] The Long Count was not developed by the Maya; the first dates appeared late in the Preclassic, among people who have been called "Epi-Olmec." Nevertheless the Classic Maya elaborated the use of the Long Count more than any other ancient Mesoamerican people.

Deciphering Maya writing has helped us understand the often violent nature of Classic Maya political histories, with the rise and fall of kings and states chronicled in the stelae of sites such as Palenque in southern Mexico, Tikal in northern Guatemala, and Copan in western Honduras. Mayas organized themselves into class-based city-states, each ruled by a dynastic family headed by a divine king in which descent flowed predominantly from fathers to sons. While women, on occasion, served as rulers, this was usually because their sons were too young to take a throne after a father had died.[31]

Kings and nobles based their great wealth on the agricultural and other kinds of labor of commoners, men and women who produced food, textiles, and many other goods. While much of the food eaten on a daily basis was produced locally, long distance trade in salt, cacao, pottery, obsidian, and, for elites, jade, feathers, and textiles, moved goods throughout the Maya lowlands and beyond. In limestone, clay, and obsidian, Maya craftsmen produced the ordinary implements necessary for daily life. They also produced exquisite works of art—paintings, sculptures, and ceramics. One imagines that the Classic-period textiles produced by women were of similar beauty, but these did not survive to the present in the rainforest environment in which they were woven. Those works of art that survived show kings, warriors, captives, deities, emissaries from other areas such as Teotihuacan, and depict life, death, and the Maya cosmos.

Cyclical creations and destructions were a part of Maya cosmology with the present world having been created some 5000 years ago when a corn deity called "One Maize" in Classic-period writings created the Maya universe. Other deities were associated with writing and science (Itzamna or "Lizard House"), his wife Chak Chel ("Lady Rainbow"), the goddess of weaving, medicine, and childbirth, a rain god known as Chak, and a wind god ("Ik"). These gods took a variety of forms and played roles in the myths and rituals associated with the life cycle and the glorification of rulers who claimed a kind of ritual kinship with important deities.[32]

These great Classic-period deities could not shield the Maya from the problems that lead to the decline of civilizations. From AD 790 on, the stelae on which dynastic histories were carved ceased to be erected throughout the southern lowlands. Soon thereafter the ceremonial centers of most sites were abandoned. Many theories have been advanced to explain why this happened. In the 50 years before the collapse began, there were more Maya city-states, and they were larger than ever before. The consequences of a growing gap between rich and poor can be seen in the bones of non-elites who were shorter than previously and were suffering from diseases relating to poor nutrition. Was the overall population outstripping the capacity of Maya farmers to feed it? What role might the droughts and intensified warfare of the eighth and ninth centuries have played?

While ecological overuse surely played a critical role in the collapse of most sites in the Maya lowlands, not all Mayas died out. Sites in the northern lowlands as well as in the highlands continued to survive, even flourish, well into the ninth century and beyond. What happened to the bulk of the Maya population as the city-states ceased to exist remains an enduring puzzle. Many must have died; others remained in or around the dying cities, squatting in places that were only a shadow of what they had been. Others likely migrated, many to the north to cities that survived the decline. Archaeology has not, as of now, provided a detailed answer.

What it does tell us is that the centuries following the collapse, a period spanning both what some call the *Epiclassic* (about AD 750–900) and the *Postclassic* (AD 900 to 1521), were years of movement and change, with the Valleys of Mexico and Oaxaca seeing the development of powerful, new civilizations. While the Epiclassic could be thought of as a time of disruption and destruction, perhaps set off by the fall of Teotihuacan, it might better be thought of as a time of transformation during which "Mesoamerica became a massive crucible in which culturally and ethnically different peoples came into contact and fused."[33] New populations moved into Teotihuacan, but the site was no longer dominant. Instead, this was a time that saw the rise of multiple regional centers, many with expansionist aims. Yet for all the evidence of warfare, sacrifice, and death, no single site or civilization dominated in the way that Teotihuacan had. Influences between the

central valleys and southern Mesoamerica were flowing back and forth as never before, resulting in sites with blended forms of art and architecture from the center and south such as Cacaxtla, Xochitecatl, Cantona, and Xochicalco in the center, and El Tajín, Chichen Itza, and Cotzumalhuapa to the south. A similar pattern of the decline of the major center, Monte Albán, and the growth of regional centers can be seen in Oaxaca.

A new development in Mesoamerica during the Epiclassic was the growth of large new sites such as La Quemada in the northern state of Zacatecas. The site was protected by defensive walls and has evidence of a lot of human bone, the product perhaps of both warfare and the worship of an ancestor cult. The presence of ball courts at this and other sites suggests a connection with central Mexico. An innovation at La Quemada, the *tzompantli* (or skull rack), would become important at later Mesoamerican sites, especially Tula and Tenochtitlan.[34]

By the tenth century many of the late Classic-period sites had declined, but the movements of people and ideas did not diminish, and new sites, civilizations, and forms of social organization would emerge during the Postclassic, ultimately leading to the societies confronted by the Spanish. If the Classic and Postclassic periods do not seem as fundamentally different as they once did (in part because militarism is so important a characteristic of each),[35] new understandings of the nature of Postclassic societies, especially the deeper integration of trans-Mesoamerican economies, have emerged. The Postclassic is understood in particular detail because archaeologists can turn to an exceedingly rich array of written sources, many in indigenous languages, from the late Postclassic and early colonial periods.

From the Postclassic to the Conquest

The scope of economic integration, the spread of a more standardized system of representation of images, words, and sounds, and the further development of urbanism and imperialism all marked Mesoamerica's Postclassic period. These changes built upon the cultural transformations of the earlier periods, but the new developments were unprecedented in scope. As Michael Smith and Frances Berdan have argued, even the word "Postclassic" implies "negative value judgments about the quality or condition of the cultures of this time period compared to the 'Classic' cultures that preceded them."[36] If the term "Postclassic" is understood as a period rather than a stage, then it becomes possible to examine the dynamic shifts, not as declension, but on their own terms. Scholars' greater access to the languages of this period makes even deeper culturally-contextualized understandings possible, and some posit that the broad economic and cultural integration marks Mesoamerica as a *world system*, defined archaeologically as a "macroregion in which differentiated social groups were linked through regular interactions involving broad segments of participating populations."[37]

In the central region the events surrounding the rise and decline of Tula and the rise of Tenochtitlan as sites of state power echo those of the Teotihuacan in which the rise of a great state is followed by its devolution "into small and separate city-states."[38] The pattern established by Teotihuacan was, in many ways, repeated at Tula, a smaller site 50 miles northwest of today's Mexico City in the state of Hidalgo. Known to the later Nahuas as Tollan; it was the capital of the Toltecs and center of civilizational development during the early Postclassic period. While the geographic size and population of Tula did not match those of Teotihuacan—it was roughly 16 square kilometers, with a population of some 40–60,000 at its height—certainly similarities existed in architecture,

imagery, and deities. It had a sphere of influence well beyond the bounds of the city and its immediate hinterland, but its region of influence was smaller than that of Teotihuacan and more oriented towards the north.[39]

The area in and around Tula had been settled from the Preclassic on, and the site began to grow dramatically in size and population during the Epiclassic and early Postclassic. A major source of population for the site was the northwest from which came waves of immigrants who would adapt as well as change central Mexican cultural patterns. Some of these peoples, the so-called "Teochichimeca," or "real Chichimecs" came from far northern hunter-gatherer groups; others—known as the "Tamime"—were Chichimecs with a more agricultural and town-centered orientation. In combination with the area's existing population, as well as migrants known as the Nonoalca from Puebla and the Gulf Coast, what came to be known later by the Mexica as the "Tolteca-Chichimeca" people emerged in the ninth century and by the tenth century were enlarging the city of Tula, building a new city center known as Tula Grande near the earlier center, Tula Chico, which was abandoned.[40]

The most impressive structure at Tula Grande is Pyramid B which makes up in fierceness what it lacks in size, with its columns, warrior figures, and carvings of jaguars, coyotes, and heart-eating eagles. Archaeological Tula never became the economic juggernaut of agricultural and crafts productivity that Teotihuacan and the later Tenochtitlan were. Nor did it equal them in statecraft. Its soils were not as rich; its crafts production, however skilled, had little impact archaeologically beyond Tula itself. One of the paradoxes of Tula is that "[a]rchaeological Tula, which is more decorated than beautiful, contrasts with the magnificence of the Tula described in documents."[41]

The Mexica and other Nahuas depicted Tollan as a wonderful city, with supremely skilled craftsmen and intellectuals who invented writing and the calendar, and a seat of great power which unified much of Mesoamerica. While the many Nahua myths about Tollan contain contradictions and complexities (and may, on occasion, refer to places other than Tula, i.e., there were several Tollans in Nahua imaginations), the myth of greatest importance concerns one of Tula's rulers, Topiltzin Quetzalcoatl, and his downfall. Tricked by the deity Tezcatlipoca into drinking a forbidden alcoholic beverage and engaging in incestuous sexual relations, Topilztin and his followers exiled themselves, with one version describing how he set himself on fire and was transformed into the Morning Star. Another version states that he set off on a raft of snakes and sailed to the east saying he would return. This version relates both to a possible Toltec diaspora, thought to have influenced the Mayas of Chichen Itza, and the idea that the Mexica may have believed that Cortés was the returning Topiltzin, come to rule again.[42]

Toltec myths and realities coincided best in descriptions of the city as a multi-ethnic confederation in which conflict among the groups occasionally arose. In the mid-twelfth century, such conflict again developed in conjunction with drought and food shortages, and the city's last ruler, Huemac, moved his capital to Chapultepec, today the site of a magnificent park in Mexico City. After the burning and sacking of Tula, Toltec refugees spread throughout Mesoamerica. Some may have become the progenitors of a number of ruling dynasties across that vast area during the later Postclassic.[43]

The most well known and important dynasty to call upon kinship with the Toltec was the ruling dynasty of Tenochtitlan, capital city of the Mexica, the force behind the emergence and growth of the Aztec empire. The founding legends of the group often known as "Aztecs" state that the group came from a place called Aztlan from which they migrated into central Mexico and from which the name "Aztec" comes. It was not the

name by which this group called itself; that name was "Mexica" and is the preferred term here. The modern usage of the term "Aztec" has multiple and imprecise referents, from the inhabitants of Tenochtitlan (who sometimes also referred to themselves as Tenochca) to all the Nahuatl-speakers of the central region.[44]

Mexica histories say that after leaving Aztlan, following their patron deity Huitzilopochtli, they wandered slowly south and east, eventually settling on a small island in Lake Texcoco, one of five interconnected lakes at the center of the Valley of Mexico. The Mexica were the last of numerous groups that migrated from the north; others, like the Mexica, claimed kinship with both Chichimecs and Toltecs and formed city-states or kingdoms (known in the singular form as *altepetl*) within and beyond the valley. After settling the island, the Mexicas then set about building their capital city, Tenochtitlan, as well as their sister-city, Tlatelolco. Both developed dense urban layouts as well as agricultural potential through the use of raised garden plots known as *chinampas* on swampy lands reclaimed from the lake.

During this period, the Mexica were far from the most powerful people in the region. The dominant powers were the Tepaneca of Azcapotzalco (on the mainland, to the west of Lake Texcoco) and the Acolhua of Texcoco (eastern side). At first, the Mexica threw their lot in with the Tepaneca, to whom they paid tribute. They also transformed the collective leadership style of their earlier history by creating a ruling dynasty through the relationship between the first Mexica supreme ruler, or *tlatoani*, Acamapichtli, and either his mother or wife (the sources differ on this point), Ilancueitl, a princess from Culhuacan, whose rulers were Toltec descendants.[45] In 1428, the Mexica (in combination with armies of other nearby rulers) overthrew the Tepaneca and formed, with dissident Tepaneca from Tlacopan and the Acolhua of Texcoco, an alliance which through war, tribute, and trade launched a project of empire building. This *excan tlatoloyan* ("tribunal of three places"), known more commonly as the "Triple Alliance," expanded its realms of influence through much, though certainly not all, of Mesoamerica.[46]

Scholars often characterize this empire as "hegemonic." Rather than being a territorial empire characterized by direct political control, standing armies, and huge construction programs (like the Inka of the Andes), the Triple Alliance was more loosely and flexibly organized. While lower-level officials collected tribute and reinforced relations between conquered territories and imperial governments, conquered kings often continued to rule, little was invested in infrastructure, and imperial rulers used both force and persuasion to gain compliance with demands and policies.[47]

Whereas less emphasis was placed on political control, economic relations tell a different story. Imperial tribute collectors oversaw the assembling of goods that flowed, in huge amounts, to the center in exchange for protection. Tribute included everyday items such as food, cloth, and basic crafts items, along with luxury items such as tropical feathers, gold dust, and incense. The alliance powers kept written records of the payments which they collected on a schedule and distributed in a 2:2:1 formula (two fifths going to Tenochtitlan and Texcoco; one fifth to Tlacopan). Tribute was only one means by which goods came into the imperial capitols. Long- and short-distance trade brought utilitarian and luxury goods into the households and markets of cities within and beyond the cities and towns of the Triple Alliance.

While much of the warfare in which the alliance engaged served to bring an ever increasing number of areas into the empire, the alliance never succeeded in conquering a number of important areas, especially the city-states of Tlaxcala to the east and the Tarascans to the west. Client states along the borders helped maintain a state of relative

peace instead of paying tribute. And with at least one enemy group, the Tlaxcalans, the Triple Alliance engaged in ritual wars, *xochiyaotl*, ("flowery war"), the purpose of which was to provide captives for sacrificial ceremonies.

Warfare, in fact, had a variety of purposes, only one of which was economic. For the Mexica—and Nahuas more broadly—warfare was inextricably connected to the religious system, and it is vital, therefore, to understand the connections Nahuas drew among their conceptions of war, death, birth, and life. The militarism of the societies of central Mexico reflected not just the empire building of the period but the belief of warriors that as they fought they were on a sacred mission. They believed that their gods had sacrificed themselves to create both the sun and human beings and gave offerings of hearts and blood of defeated enemies to repay that debt. Because Nahuas practiced human sacrifice on a massive scale (though Spanish descriptions often exaggerate the scale, if not the horror, of the practice), this aspect of their religion attracts much more attention than other features of their incredibly complex beliefs, rituals, and religiously-focused institutions.[48]

This complexity can best be understood by comprehending the Nahua belief that they lived immersed in a spiritual world in which deities took multiple forms and carried sacred powers that shaped every aspect of daily life for individuals, local communities, kingdoms, and the Triple Alliance. Gods, myths, calendars, and ritual practices all were an amalgam of earlier traditions (especially those of Teotihuacan and Tula), traditions of the migrants from northern Mexico, and those of conquered peoples within and beyond the Valley of Mexico. While the deities might be depicted in human-like forms, individual deities could take multiple identities (such as Ometecuhtli and Omecihuatl, "Two Lord" and "Two Lady," male and female creator deities, for example), carry multiple names relating to basic goods or ideas (e.g., Xilonen, Centeotl, different names for female maize deities), and directly influence life on earth through their sacred powers. The latter is best exemplified by one of the most powerful deities, Tezcatlipoca ("Smoking Mirror"), associated with fate, both advantageous and disadvantageous, as well as kingship. These were gods to be appeased, not in order to gain eternal salvation but to influence—to the extent possible—one's destiny on this earth. Ritual, magic, and divination all had a role to play for individuals, communities, and states, and deities of creation, water and agricultural fertility, war, sacrifice, and death influenced not just life on earth but one's fate in the afterlife as well.[49]

The intense spirituality elsewhere, for example among the Zapotecs and Mixtecs of the Valley of Oaxaca, also caught the attention of Spaniards who wrote about such places as Mitla, which became a center of Postclassic Zapotec civilization and religious practice. This settlement provided a home for the most important of Zapotec religious practitioners, the *uija-tào*, or "great seer." The Zapotecs dedicated a beautiful palace complex at this small but architecturally magnificent holy site to the priest who oversaw this place whose name in the Zapotecan language, Lyobaá, meant "Place of Rest" and where kings, nobles, and great warriors may have been buried.[50] Royal tombs from other earlier Zapotec sites, especially Monte Alban, provide clues to their diverse pantheon of gods including Cocijo, the deity of rain and lightening, Pitao Cozobi, the maize god, and a feather serpent who, with other deities, bears similarities to central Mexican Classic and Postclassic divinities.

By AD 1000 the Valley of Oaxaca experienced another set of transformational changes (the first set having been set off by the decline of Monte Albán) which reflect the growing influence of the Mixtec (or Ñudzahui) kingdoms of the Mixteca Alta in western

Oaxaca. Some scholars believed that during the later Postclassic, the Mixtecs conquered the Zapotecs,[51] recent scholarship demonstrates that ethnic and political relations in and around the Valley of Oaxaca were far more complex than a simple conquest model conveys. Archaeological and written sources show "marriages between the Zapotec nobility of the valley and lords from the neighboring Mixteca Alta, immigration of Mixtecan nobility and peasants into the valley, the conquest of the coastal market center of Tehuantepec by valley and Mixtec armies, the entrance of Aztec traders, and the establishment of an Aztec colony." There was an explosion of population, polities, and languages spoken in the region, with Mixtec and Zapotec elites interacting through diplomacy and marriage, responding to conflict by military means, and encouraging the exchange of crafts and trade goods.[52]

Oaxaca participated in the general Postclassic economic pattern of intensified commercialization as seen through a growing number of markets and merchants and even the introduction of money. After AD 1200, metallurgy techniques from West Mexico spread east and south, and Mixtec and other metalworkers in Oaxaca produced standardized "axe-monies," copper items thought to serve as currency.[53] Oaxaca's west coast provided raw materials for many pan-Mesoamerican luxury items, including feathers, shells, dyes, salt, cacao, and cotton, with such goods attracting the attention of the Mexica and the Triple Alliance.[54] Their efforts to conquer Mixtec and Zapotec kingdoms brought further change to this region, yet archaeological evidence for the Triple Alliance conquests are slim, and Mixtecs and Zapotecs on occasion allied with each other to repel imperial forces.[55]

The political economy of late Postclassic Oaxaca, with its fractured polities and ambiguous relationship to the great superpower of its time, provides a model for describing the sociopolitical organization of the lowland and highland Maya to the south. Postclassic Mayas participated in the complex tendency towards both amalgamations of allied polities and the fracturing of those alliances that characterized much of Mesoamerica in that period. During the Epiclassic and early Postclassic a larger state developed—as discussed earlier—at Chichen Itzá. After its decline, Mayas founded a new center at the site of Mayapan in the northern lowlands. The Castillo, a four-sided pyramid clearly modeled after the larger El Castillo structure at Chichen Itzá, dominated this walled city's ceremonial center. Written sources, especially the *Books of the Chilam Balam*, suggest that an exiled group of Itza Maya from Chichen Itza founded Mayapan which became, for a time, the leading trade center of the south, controlling salt and indigo production across its hinterlands. Seaborne commerce formed the foundation for trade in utilitarian and luxury items, but trade in everyday goods dominated in comparison to the overland trading patterns of Classic Maya states in which luxury items abounded.[56]

The growth in population occurring across the Maya region fueled both economic and political change as a political system better able to consolidate economic, military, and religious power arose. While several elite lineages or houses shared rule at Mayapan (perhaps dividing or rotating civil and religious responsibilities), the Cocom Maya dominated both the city of Mayapan and the provinces it controlled.[57] One of the lineages subordinated in the later years of Cocom control, the Xiu, was eventually expelled and went on to take their revenge by ending Mayapan's leading role in the mid-fifteenth century. No paramount city-state would then emerge before the arrival of the first Spaniards in 1517. The leading families—Xiu and others—took over or founded new city-states throughout the northern Yucatán and beyond, which resulted in the political fragmentation observed by the Spanish when they entered the region. The more collective

style of leadership of the Maya Postclassic kingdoms meant that kings were no longer divine rulers. The more secular rulers of this period promoted religious cults designed to reinforce the cosmopolitan, multiethnic, highly interactive, and fluid power relations of the Postclassic Mesoamerican "world."[58]

Was this "world" a world system? While a variety of archaeologists consider the latter term an appropriate metaphor, there are good reasons to restrict the concept of "world system" to describe the way capitalism began economically to unite regions of the world that prior to 1492 had been wholly separate. Before the sixteenth century, globalization was not possible. After the sixteenth century, it was.[59] Along with our increased understandings of women's roles in Postclassic political, economic, and belief systems, archaeologists' detailed syntheses of material and textual data provide us with a much more accurate understanding of Postclassic societies and their iconographic, economic, and political interactions across the whole of the Mesoamerican cultural area.

Conquest and Conclusion

When Cortés and those who followed him arrived in Mesoamerica they encountered societies that were the products of thousands of years of cultural innovation. From the Archaic to the Postclassic, transformational changes occurred in which goods and ideas were exchanged and emulated, regions were integrated politically and/or economically beyond earlier eras, and the achievements of earlier periods made possible the cosmopolitan, highly interactive, and fluid societies created by the women and men of the Postclassic era. While Eric Wolf's idea of cycles, described so evocatively in S*ons of the Shaking Earth*, retains some utility for characterizing Mesoamerica's cultural history over the *longue dureé*, it is clear that recent archaeologists have integrated material and textual evidence, including indigenous language evidence, analyzed the roles of women in a wide array of societies, and sought new models—especially the idea of world systems—to achieve more accurate understandings of long-term change and the levels of economic integration and social and cultural interaction reached during the Postclassic. While the written sources of the Postclassic can shed some light on earlier civilizations, they are most useful for helping us to appreciate the Postclassic as both the culmination of earlier cultural developments as well as a uniquely intense period of sophisticated, integrative political, economic, and cultural change.

Cortés, Nuño de Guzmán, the Montejos, and Alvarado, among many others, profited from Mesoamerican people and their productivity even as they and other Spaniards undermined the environmental, material, social, and intellectual systems that undergirded Postclassic societies. The conquest of Mesoamerica was a lengthy, brutal, exploitative affair, but it was also ambivalent and incomplete.[60] Responses to that period of intense population loss and cultural change included continuity, hybridity, and creativity. The growing, vocal, politically active indigenous men and women of today's Mexico bear witness to that.

Notes

1   Detailed descriptions of the forms of writing found in Mesoamerica and analysis of their role as a "propaganda tool of the state," see Joyce Marcus *Mesoamerican Writing Systems: Propaganda, Myth, and History in Four Ancient Civilizations* (Princeton: Princeton University Press, 1992), especially ch.1, quote on p. 7.

2 Richard E.W. Adams, *Prehistoric Mesoamerica* (Norman: University of Oklahoma Press, 1991, rev. ed.), 19–20.

3 Paul Kirchhoff, Mesoamerica: Its Geographical Limits, Ethnic Composition, and Cultural Characteristics, in *Heritage of Conquest*, ed., Sol Tax (New York: Free Press, 1952), 17–30 (first published in Spanish in 1943).

4 I follow the terminology discussed by Richard E.W. Adams in his essay, Introduction to a Survey of the Native Prehistoric Cultures of Mesoamerica, in *The Cambridge History of the Native Peoples of the Americas*, vol.2 (pt. 1), Mesoamerica, eds. Richard E.W. Adams and Murdo J. MacLeod (Cambridge and NY: Cambridge University Press), 7–12.

5 Robert N. Zeitlin and Judith Francis Zeitlin, The Paleoindian and Archaic Cultures of Mesoamerica, in *The Cambridge History of the Native Peoples of the Americas*, vol. 2 (pt. 1), 45.

6 Cynthia Irwin-Williams, Summary of Archaeological Evidence from the Valsequillo Region, Puebla, Mexico, in *Cultural Continuity in Mesoamerica*, ed. D. L. Browman (The Hague: Mouton, 1978).

7 Zeitlin and Zeitlin, The Paleoindian and Archaic Cultures of Mesoamerica, 68–9.

8 Robert McC. Netting, a pioneer in the study of cultural ecology, defined the term, noting its historical dimensions, as the examination of "the environment as people were affected by it, used it, sought to understand it, and modified it. Their interaction with nature has certainly been humankind's most enduring practical concern, and it may have formed on of their earliest intellectual exercises." See his book *Cultural Ecology* (Menlo Park, CA: Cummings Publishing Company, 1977), 1–2.

9 For a discussion of the evidence for women's roles in plant domestication, see Susan Kellogg, *Weaving the Past* (NY: Oxford University Press, 2005), 12–13.

10 The history of domestication as well as its worldwide spread and significance are discussed in *Corn and Culture in the Prehistoric New World*, eds. Sissel Johannessen and Christine Ann Hastorf (Boulder, CO: Westview, 1994), and Arturo Warman, *Corn and Capitalism: How a Botanical Bastard Grew to Global Dominance*, trans. Nancy L. Estrate (Chapel Hill: University of North Carolina Press, 2003).

11 The possibilities are discussed in Michael Coe and Rex Koontz, *Mexico from the Olmecs to the Aztecs* (London: Thames and Hudson, 6th ed.), 61–2.

12 Richard A. Diehl, *The Olmecs: America's First Civilization* (London: Thames and Hudson, 2004). The term "civilization" carries much cultural evolutionary baggage but many contemporary archaeologists, such as Diehl, use it in a way that focuses on organizational features without making value judgments about the comparative worth of societies.

13 Among many fine books detailing Olmec art and culture, see Ignacio Bernal, *The Olmec World* (Berkeley: University of California Press, 1969).

14 P. David Joralemon's article, A Study of Olmec Iconography, in *Studies in Pre-Columbian Art and Archaeology* 7 (1971) remains the essential study of this topic.

15 Michael Coe, The Olmec Heartland: Evolution of Ideology, in *Regional Perspectives on the Olmec*, eds. Robert J. Sharer and David C. Grove (Cambridge: Cambridge University Press, 1989), 79–80.

16 David C. Grove, Olmec: What's In a Name? In *Regional Perspectives on the Olmec*, 10.

17 Ibid., 12.

18 On the development and roles of elites in prehispanic Mesoamerica, see Diane Z. Chase and Arlen F. Chase, eds., *Mesoamerican Elites: An Archaeological Assessment* (Norman: University of Oklahoma Press, 1992). On the possible role of the Olmecs as Mesoamerica's first state, see John E. Clark, Mesoamerica's First State, in *the Political Economy of Ancient Mesoamerica*, eds., Vernon L. Scarborough and John E. Clark (Albuquerque: University of New Mexico Press, 2007).

19 Coe and Koontz, *Mexico*, 76–8.

20 George L. Cowgill, The Central Mexican Highlands from the Rise of Teotihuacan to the Decline of Tula, in *Cambridge History of Native Peoples*, Mesoamerica, 2(1):259–62.

21 René Millon, R. Bruce Drewitt, and George L. Cowgill, *Urbanization at Teotihuacán, Mexico* (Austin: University of Texas Press, 1973), 29–38.

22 Cowgill, The Central Mexican Highlands, 276–7.

23 Esther Pasztory summarizes scholarly discussions of Teotihuacan religion in her book *Teotihuacan: An Experiment in Living* (Norman: University of Oklahoma Press, 1997).

24 René Millon, Teotihuacan: City, State, and Civilization, in *Supplement to the Handbook of Middle American Indians*, vol.1, Archaeology, ed., Jeremy A. Sabloff (Austin: University of Texas Press, 1981), 217. This issue is discussed further in Annabeth Headrick, *The Teotihuacan Trinity: The Sociopolitical Structure of an Ancient Mesoamerican City* (Austin: University of Texas Press, 2007).

25 Coe and Koontz, *Mexico*, 119.

26 Joyce Marcus and Kent V. Flannery, Cultural Evolution in Oaxaca: The Origins of the Zapotec and Mixtec Civilizations, in Adams and MacLeod, *Native Peoples of the Americas*, vol. 2(1), 388.

27 Joyce Marcus and Kent V. Flannery, *Zapotec Civilization: How Urban Society Evolved in Mexico's Oaxaca Valley* (London: Thames and Hudson, 1996).

28 Excellent discussions of Classic-period Maya culture can be found in Michael Coe, *The Maya* (NY: Thames and Hudson, 2005, 7th ed.) and Robert Sharer with Loa P. Traxler, *The Ancient Maya* (Stanford: Stanford University Press, 2006, 6th ed.).

29 Norman Hammond, The Maya Lowlands: Pioneer Farmers to Merchant Princes, in *The Cambridge History of the Native Peoples of the Americas*, vol. 2 (pt. 1), Mesoamerica, eds., Richard E. W. Adams and Murdo J. MacLeod (NY: Cambridge University Press, 2000), 231.

30 Michael Coe, *The Maya*, 60–4 (quote on 63).

31 Sharer, *The Ancient Maya*, chs. 6–9 and 12 contain extensive discussions of Maya polities. On prehispanic Maya women, see Traci Arden, ed., *Ancient Maya Women* (Walnut Creek, CA: AltaMira Press, 2002), Rosemary Joyce, *Gender and Power in Prehispanic Mesoamerica* (Austin: University of Texas Press, 2000), and Kellogg, *Weaving the Past*, 35–41.

32 Prehispanic Maya religious beliefs, especially during the Classic period, are ably discussed by David Freidel, Linda Schele, and Joy Parker, in *Maya Cosmos: Three Thousand Years on the Shaman's Path* (NY: William Morrow).

33 Alfredo López Austin and Leonardo López Luján, *Mexico's Indigenous Past*, trans., Bernard R. Ortiz de Montellano (Norman: University of Oklahoma Press, 2001), 173.

34 Ventura R. Perez, Ben A. Nelson, and Debra L. Martin, Veneration or Violence: A Study of Variations in Human Bone Modification at La Quemada, in *Social Violence in the Prehistoric American Southwest*, eds. Deborah L. Nichols and Patricia L. Crown (Tucson: University of Arizona Press, 2008), 123–42.

35 For a study of Mesoamerican civilizations as seen through militarism, see Ross Hassig, *War and Society in Ancient Mesoamerica* (Berkeley: University of California Press, 1992).

36 Michael E. Smith and Frances F. Berdan, Postclassic Mesoamerica, in *The Postclassic Mesoamerican World*, eds., Michael E. Smith and Frances F. Berdan (Salt Lake City: University of Utah Press, 2003).

37 Susan Kepecs and Philip Kohl, Conceptualizing Macroregional Interaction: World-Systems Theory and the Archaeological Record, in Smith and Berdan, *The Postclassic Mesoamerican World*, 14.

38 Thomas A. Charlton, The Aztecs and Their Contemporaries: The Central and Eastern Mexican Highlands, in Adams and MacLeod, *Cambridge History*, Mesoamerica, 2(1):500.

39 Alba Guadalupe Mastache, Robert H. Cobean, and Dan M. Healan, *Ancient Tollan: Tula and the Toltec Heartland* (Boulder: University Press of Colorado, 2002).

40 The term "Chichimec" comes from the Nahuatl. Nahuas generally used it to refer to peoples from the north whom they considered uncivilized. While many scholars believe the term means, as Coe and Koontz put it, "something like lineage of the dog," (153) the word may

be derived from the Nahuatl word for suckle, *chichi*, likening the peoples of the north to infants, not yet socialized. See Frances Karttunen, *An Analytical Dictionary of Nahuatl* (Austin: University of Texas Press, 1983), 48.

41 López Austin and López Luján, *Mexico's Indigenous Past*, 199.

42 Extensive explorations and analysis of Mesoamerican myths about Quetzalcoatl can be found in H.B. Nicholson, *Topiltzin Quetzalcoatl: The Once and Future Lord of the Toltecs* (Boulder, CO: University Press of Colorado, (2001). Nicholson argues that the identification of Cortés with Quetalcoatl was a prehispanic phenomenon. In *The Aztec Kings* Susan Gillespie argues against that interpretation.

43 Geoffrey E. Braswell, K'iche'an Origins, Symbolic Emulation, and Ethnogenesis in the Maya Highlands, A.D. 1450–1524. In Smith and Berdan, *The Postclassic Mesoamerican World*, 297–303.

44 Europeans introduced change and confusion about identity throughout the Americas as they struggled to learn the names and languages of the Native American peoples they encountered. Names used by native peoples for themselves are not necessarily the names by which they are commonly recognized, most of which date to the colonial period. The situation is still more complex in Mesoamerican studies because archaeologists tend to use the term "Aztec" both for specific peoples such as the Mexica and for the Nahuatl-speakers of the central region more broadly. Historians generally use ethnically precise terms for specific peoples and the word "Nahua" for the broader usage, and I follow that usage here.

45 On marriages to royal women as ennobling, especially relating to the creation of the Mexica ruling dynasty, see Susan Gillespie, *The Aztec Kings: The Construction of Rulership in Mexica History* (Tucson: University of Arizona Press, 1989), chs. 1–4.

46 The Nahuatl terminology is discussed in López Austin and López Luján, *Mexico's Indigenous Past*, 208–209. Also see Robert H. Barlow, *The Extent of the Empire of the Culhua-Mexica*, Ibero-Americana 28. (Berkeley: University of California Press, 1949) and Pedro Carrasco, *The Tenochca Empire of Ancient Mexico: The Triple Alliance of Tenochtitlan, Tetzcoco, and Tlacopan* (Norman: University of Oklahoma Press, 1999).

47 Michael E. Smith, *The Aztecs*, 2nd ed. (Malden, MA and Oxford: Blackwell, 2003), 156–7, quote on 157. Also see Frances F. Berdan et al, *Aztec Imperial Strategies* (Washington D.C.: Dumbarton Oaks, 1996).

48 Caroline Dodds Pennock, *Bonds of Blood: Gender, Lifecycle and Sacrifice in Aztec Culture* (NY: Palgrave Macmillan, 2008).

49 I cannot do justice to the complexity of Nahua religious beliefs and practices in the space allotted. Important aspects of that religious system on which excellent research exists include the institutionalization of religion in locations such as temples and religious schools, the personnel and roles they played in religious practice and the complexities of myths, deities, and the calendrical system. Excellent introductions can be found in David Carrasco, *City of Sacrifice: The Aztec Empire and the Role of Violence in a Civilization* (Boston: Beacon, 1999), and Michel Graulich, *Myths of Ancient Mexico*, transl., Bernard R. Ortiz de Montellano and Thelma Ortiz de Montellano (Norman: University of Oklahoma Press, 1997). An excellent overall discussion of Mexica (and more broadly, Nahua) religious beliefs can be found in Richard Townsend, *The Aztecs* (London: Thames and Hudson, 2009, 3rd ed.).

50 Coe and Koontz, *Mexico: From the Olmecs to the Aztecs*, 175–77.

51 See John Paddock, "Oaxaca in Ancient Mesoamerica," 202, 209 and Paddock, "Mixtec Ethnohistory and Monte Albán V," 367–385, in John Paddock, ed., *Ancient Oaxaca: Discoveries in Mexican Archaeology and History*, (Stanford: Stanford University Press, 2009).

52 Richard Blanton, Stephen A. Kowalewski, Gary M. Feinman, and Laura M. Finsten, *Ancient Mesoamerica: A Comparison of Change in Three Regions*, 2nd ed. (Cambridge and NY: Cambridge University Press, 1993), 99, and Dorothy Hosler, "Metal Production," in *The Postclassic Mesoamerican World*, 159–71.

53   Jeffrey P.Blomster, ed., Changing Cloud Formations: The Sociopolitics of Oaxaca in Late Classic/Postclassic Mesoamerica, in *After Monte Albán: Transformation and Negotiation in Oaxaca, Mexico* (Boulder, CO: University Press of Colorado, 2008), 28.

54   Stacie M. King, Interregional Networks of the Oaxacan Early Postclassic: Connecting the Coast and the Highlands, in Blomster, *After Monte Albán*, 255.

55   Blomster, Changing Cloud Formations, 34–5.

56   Sharer, *The Ancient Maya,* ch.10.

57   For detailed discussion of the "house" model of late Postclassic kinship relations, see the essays in Rosemary A. Joyce and Susan D. Gillespie, eds, *Beyond Kinship: Social and Material Reproduction in House Societies* (Philadelphia: University of Pennsylvania Press, 2000).

58   Sharer, *The Ancient Maya,* 627–8; also see Geoffrey E. Braswell, K'iche'an Origins, Symbolic Emulation, and Ethnogenesis in the Maya Highlands, A.D. 1450–1524, in Smith and Berdan, *The Postclassic Mesoamerican World*, 301–302.

59   While the recent book *Global Social Change: Historical and Comparative Perspectives*, edited by Christopher Chase-Dunn and Salvatore J. Babones (Baltimore: Johns Hopkins University Press, 2006) provides an overview of many of the issues relating to the interrelated topics of globalization and world systems past and present, Steve J. Stern's 1988 article, "Feudalism, Capitalism and the World System in the Perspective of Latin American and Caribbean, *American Historical Review* 93(4), 1988: 829–72 remains the best historiographical overview of the literature relating to these issues on early Latin America.

60   On the ambivalence and incompleteness of conquest, see Inga Clendinnen, *Ambivalent Conquests: Maya and Spaniards in Yucatán, 1517–1570* (Cambridge and NY: Cambridge University Press, 1987); Matthew Restall, *Seven Myths of the Spanish Conquest* (NY: Oxford University Press, 2003); and Laura E. Matthew and Michel R. Oudijk, eds., *Indian Conquistadors: Indigenous Allies in the Conquest of Mesoamerica* (Norman: University of Oklahoma Press, 2007).

CHAPTER EIGHT

Painting History, Reading Painted Histories: Ethnoliteracy in Prehispanic Oaxaca and Colonial Central Mexico

ELIZABETH BAKEWELL AND BYRON ELLSWORTH HAMANN

For over four hundred years, from around 1250 to 1600, a shared system of visual communication was used throughout Mesoamerica. From the Valley of Mexico to the Yucatán peninsula, from the highlands of Oaxaca to the cloud forests of Guatemala, painters, potters, and sculptors created images with strong geometric forms, bold colors, and black outlines. This "Postclassic International Style" or "Mixteca-Puebla Style" was shared across linguistic boundaries: it was a type of visual communication understood by speakers of many different languages (Blomster 2008: 10–11). This chapter provides an introduction to two manifestations of this style, and considers how indigenous people used it to record their history. As we will see, this style was used even after the Europeans arrived. It did not vanish instantly with the coming of the alphabet and spine-bound books.

We focus on two documents featured in *Mesolore: A Cybercenter for Research and Teaching on Mesoamerica* (Bakewell and Hamann 2010). At this online resource—www.mesolore.net—one can interact with both documents in color, read expanded tutorials, and listen to commentaries by scholars from a number of different disciplines and backgrounds. The first document is the prehispanic *Codex Nuttall*. A screenfold book of gessoed deerskin, the *Nuttall* was painted by Ñudzavui people in what is now the state of Oaxaca. It dates to around the fifteenth century. Ten of its pages recount a story of origins and foundations that we focus on here. The second document is the *Lienzo de Tlaxcala*. This massive cotton cloth was created by Nahuas around 1552 in the central Mexican town of Tlaxcala. The two by five meter expanse of the *Lienzo* depicted the conquest of Mesoamerica as seen through Native American eyes. A comparison of these two documents reveals commonalities as well as variations within the Postclassic International Style. Although the *Nuttall* and the *Lienzo* share many visual features, they were created in two different places, by two different ethnic groups speaking two different languages, at two different points in time. Furthermore, the posthispanic *Lienzo* combines images of prehispanic origin with visual traditions imported from Europe.

Figure 8.1 Overview of *Codex Nuttall* pages 14 to 22.

Both the *Nuttall* and the *Lienzo* use pictures to convey most of their information. Reading them requires literacy skills different from those we generally use today for reading alphabetic texts. In this chapter, we consider how both of these documents can be read on two different visual levels. We begin by retelling the narrative of each document "up close," moving from detail to detail across each painted surface. We introduce the basic conventions of indigenous pictorial writing, and show how glyphs were combined to tell complex narratives. In the second part of the chapter, we stand back from surface details and consider the broad visual patterns that emerge when multiple scenes are viewed together. Both documents have important things to tell the viewer at a distance. Both the *Nuttall* and *Lienzo* arrange the details of their histories in binary visual structures, coded as male and female, upper and lower. In the case of the *Codex Nuttall*, this binary structure can be understood as one manifestation of deep narrative templates that are found throughout the Americas. The same is true, on one level, for the *Lienzo de Tlaxcala*. But since we know much more about the context in which this colonial document was created, we can also see how an ancient narrative structure was adapted to understand the changes wrought by colonization. Overall, this chapter is concerned with visual communication, the connections and disjunctions of prehispanic and colonial worlds, and the ways twenty-first century modes of reading may make us blind, now, to important aspects of Mesoamerican painted histories.

Up Close: The *Codex Nuttall*

The *Codex Nuttall* is a long strip of gessoed deerskin 11.22 meters in length, folded into 47 "pages" measuring about 24.3 by 18.4 cm each. It was created around the fifteenth century. Both front and back are painted with a series of separate stories. Since each of these distinct narratives has a slightly different style, it seems probable that they were copied from other, separate screenfolds. The *Codex Nuttall*, then, is a kind of anthology of Ñudzavui narratives. It is currently housed in the British Museum, and takes its name from Mesoamericanist Zelia Nuttall, who oversaw the first lithographed facsimile of the document in 1902.[1]

One of the *Nuttall*'s many stories spans pages 14 to 22, which present a tale of origins and foundations. Figure 8.1 shows these ten pages together. The story is read from right to left. It begins (page 14) and ends (page 22) with large geographic scenes, and also has a large geographic scene near its center (pages 19a and 19b). The other pages, however, are subdivided by red vertical lines, which create a maze-like path through which the reader follows the narrative.

The space of page 14, the opening scene, is divided into six visual blocks. Each contains a pair of figures and a complex place glyph (Fig. 8.2). In the upper right-hand corner

<18   <17   <16   <15   <14

Figure 8.1 (*cont'd*)

appear the two protagonists of the first half of this narrative, Lady 3 Flint and Lord 5 Flower. As is usual in the Postclassic International Style, they are drawn in profile. Their names are indicated by calendric glyphs painted near their bodies. People from many places in Mesoamerica were named according to the day on which they were born in a 260-day ritual calendar. This calendar cycled 13 numeric values (represented by circles) with 20 different day signs (represented by pictures of objects, animals, plants, and natural forces). The name of Lady 3 Flint, who stands on the left, is painted behind her: three round circles stacked on top of each other and, above them, a pointed flint knife (Fig. 8.2a). The name of Lord 5 Flower, who stands to the right, floats in front of his face: an L-shaped arrangement of five circles attached to a lobed flower glyph (Fig. 8.2b). We can tell Lord 5 Flower is a man because of his long white loincloth. We can tell Lady 3 Flint is a woman because she lacks a loincloth, and wears instead a long dress that covers her knees. She also has distinctive red bangs (a female hairstyle) and wears a curving green cape that symmetrically covers both her chest and her back. This garment is called a *quechquemitl* in Nahuatl (a language spoken in central Mexico), and probably *dzico* in Dzaha dzavui (the language spoken by the Ñudzavui creators of the *Codex Nuttall*; Jansen and Pérez Jiménez 2005: 15). In addition to wearing a quechquemitl, another such garment (viewed frontally, as a triangle) floats in the air to the right of Lady 3 Flint's headdress (Fig. 8.2c). Its triangular orange form is ornamented with a round shell. This small drawing represents Lady 3 Flint's personal name: "Shell Quechquemitl." Since the ritual calendar provided only 260 possible names, names used by both men and women, many people in the Ñudzavui screenfolds have a personal name in addition to their calendar name. Some of these personal names are gender-specific. Spider webs and quechquemitls, for example, are used only for the personal names of women.

Lady 3 Flint and Lord 5 Flower stand beneath an L-shaped form marked with multicolored diagonal stripes (representing stone), a blue and red band marked with eyeballs (representing sparkling stars in the sky), and seven yellow mouth-like forms with red centers (representing caves or places of emergence from the earth). One of these red and yellow forms, located in the corner of the L, is larger than the others. From its mouth emerges a multicolored (stone) band marked with footprints, a convention indicating a road or path. Lady 3 Flint and Lord 5 Flower stand upon this path, suggesting that they have just emerged from the earth. Significantly, the idea of a Place of Seven Caves as a site of origins and emergence is found throughout Mesoamerica. In Aztec narratives from central Mexico this place was called Chicomoztoc.[2]

The final detail to consider in this opening vignette is the year sign, which floats above the path between Lady 3 Flint and Lord 5 Flower (Fig. 8.2d). In addition to the 260-day ritual calendar, the Ñudzavui (and most other Mesoamerican peoples as well) also tracked a 365-day solar year. The presence of a solar year date is indicated by a large glyph that looks like the letters A and O superimposed on one another. Seven dots are attached to
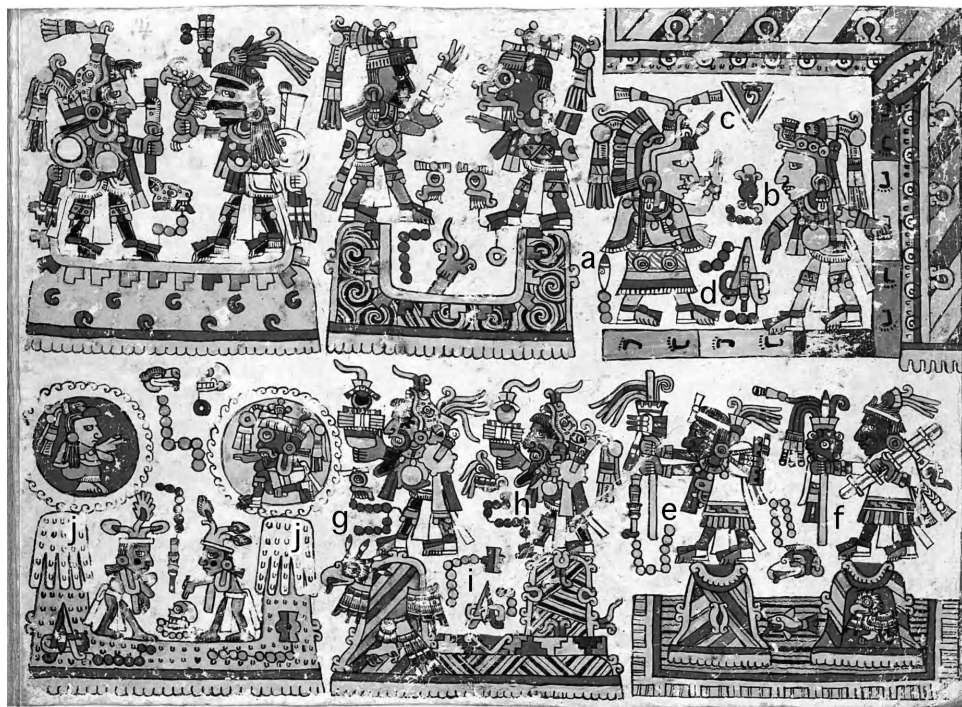
Figure 8.2   Page 14 of the *Codex Nuttall.*

this year sign (four above, three below), as well as a stick-like Reed glyph. Together, these signs indicate the Year 7 Reed.

Correlating these glyphic dates with the Western *Anno Domini* calendar can be diffi-cult. Like many Mesoamerican peoples, the Ñudzavui used their calendars for divination. Different days and years had different symbolic meanings.[3] Because of this, some date glyphs in the screenfolds may have metaphorical values. This often seems to be the case of date glyphs in Ñudzavui narratives of origins set in the distant past, such as the one we are considering here. Certain year and day combinations appear much more frequently than others in these ancient accounts—too frequently to be the result of random chron-ological chance. These constantly repeated dates, such as Year 1 Reed, Day 1 Alligator, are probably symbolic in nature. In contrast, these symbolic dates seldom appear in nar-ratives set in the fifteenth and early sixteenth centuries. In several cases, people shown at the end of screenfold genealogies were alive when the Europeans arrived, and are men-tioned in alphabetic records. The year glyphs associated with these people can therefore be correlated to year counts in the Gregorian calendar. Next, the year glyphs associated with their parents can be correlated, and then those of their grandparents, and so on. However, date correlations become more complicated (and contentious) the further back one travels through genealogical time (Rabin 2004).

The other five vignettes on page 14 are, like the scene of Lady 3 Flint and Lord 5 Flower, made up of pairs of figures standing at specific places. Directly below Lady 3 Flint and Lord 5 Flower are Lord 10 Reed (on the left; Fig. 8.2e) and Lord 10 Vulture (on the right; Fig. 8.2f). Both emerge from mouth-like "cave" forms at the summit of

bell-shaped hill glyphs. The hill glyph is one of the most common images in the screen-folds; we will see it again and again in the pages which follow. It corresponds to the Dzaha dzavui word for hill or mountain, *Yucu*. These glyphs are always marked with additional signs to indicate what specific hill is being referred to. In this case, the hill on the right is marked with an eagle (so would represent a place called Hill of the Eagle) and the hill on the left is marked with the curved yellow and red form that indicates a place of emergence (Hill of the Cave, perhaps). In turn, both hills are drawn within the waters of a river glyph, a rectangular U-shaped form filled with blue-and-black striped waters. The river glyph—*Yuta* in Dzaha dzavui —is, like the hill glyph, one we will encounter a number of times in the pages to come. A final detail to consider in this vignette is all of the paraphernalia that Lord 10 Reed and Lord 10 Vulture carry. Both men hold elabo-rate staves in front of them, and both carry objects on their backs. Lord 10 Reed bears a round sacred bundle and a fire drill; Lord 10 Vulture bears a conch shell. These are important ritual objects involved in founding a kingdom, and will be put to use in the pages to come.

Both Lord 10 Reed and Lord 10 Vulture accompany Lord 5 Flower and Lady 3 Flint on their journey across the following pages. Two more participants appear in the next vignette on the bottom of page 14. On the left stands Lord 10 Rain on a slightly different Hill of the Eagle (Fig. 8.2g); on the right stands Lord 10 Grass on a hill marked with red-and-yellow cave signs and (on the lower right side) multicolored curved volutes that represent flames or song (Fig. 8.2h). Both Lord 10 Rain and Lord 10 Grass have their arms and legs painted black and their faces painted grey: this is the face and body paint used to indicate Ñudzavui priests. Both hold bowls filled with offerings in front of them, and both wear lobed yellow circles on their backs: these represent the dried warty gourds used to hold powdered tobacco, an important ritual substance. Finally, between the two hills on which these priests stand appears a date: Year 4 Flint (attached to the A-O year sign) and Day 8 Motion (floating above the A-O sign; Fig. 8.2i).

The remaining three vignettes on page 14 are less important to the overall narrative, so we will skip over them. However, it is worth nothing that several are linked to Ñudzavui supernaturals. The pair of snow-capped mountains in the lower left-hand cor-ner (Fig. 8.2j) probably represent the slumbering volcanoes which surround the Valley of Mexico. They can be seen on clear days from some parts of the Mixteca (and are about a five-hour car ride to the northwest).

We have spent a lot of time on page 14 because it is a good place to introduce a number of basic features of Ñudzavui writing: year signs, the use of the 260-day calendar for naming, the use of personal names to further specify individuals, the differences in male versus female costume, conventions for representing stone surfaces and starry skies, and some common place glyphs (the conventions for paths, hills, and rivers).

The next three pages (15, 16, 17, plus a fragment of page 18) record the travels of our six protagonists: rulers Lady 3 Flint and Lord 5 Flower, object-bearers Lord 10 Vulture and Lord 10 Reed, and priests Lord 10 Rain and Lord 10 Grass. They are on a mission to found a kingdom, and they succeed on page 17. There, gods of the five direc-tions (North, South, East, West, and Center; Fig. 8.3a–e) look on as the sacred bundle and fire drill are placed inside a temple, as the Flint Staff and the Red and White Bundle staff are planted in the ground (Fig. 8.3f), as the conch shell is sounded (Fig. 8.3g), and as Lord 5 Flower and Lady 3 Flint are seated as rulers on stone and jaguar thrones within a palace (Fig. 8.3h).
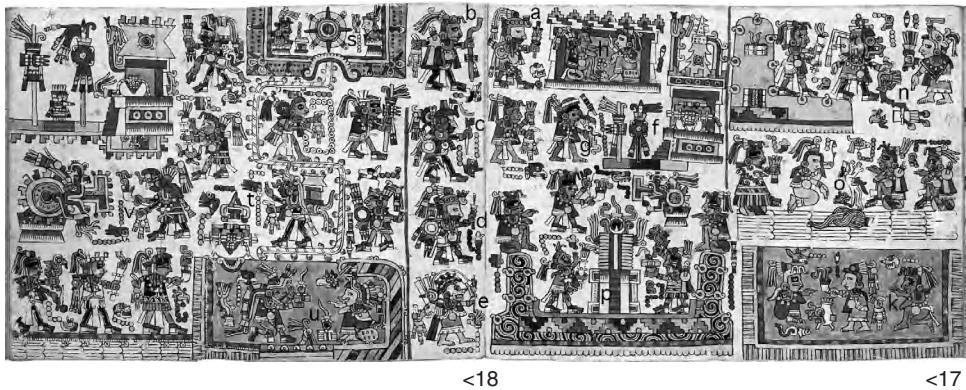
Figure 8.3   Pages 15 to 18 of the *Codex Nuttall*.

Before all this happens, however, the protagonists have a number of adventures. On each of these three pages (15, 16, and 17), Lady 3 Flint enters a river to communicate with local supernaturals (Fig. 8.3i–k). Lady 3 Flint and Lord 5 Flower also perform different types of sacrifices. On page 15, these take place before particular hills. Before a Hill of Fire and Motion, Lord 5 Flower uses a bone awl to draw blood from his ear (Fig. 8.3l). "At the foot of" a speckled and smoking Hill, Lady 3 Flint raises a smoking incense burner (Fig. 8.3m). On the right half of page 17, a quail is decapitated before Lady 3 Flint (Fig. 8.3n) and, below, offerings of a quail's head, a knot of grass, and a sacrificed dog are placed between Lord 5 Flower and Lady 3 Flint (to the left) and priests Lord 10 Grass and Lord 10 Rain (to the right; Fig 8.3o). On left half of the same page, a stack of offerings piled upon a temple platform is set on fire between two hills (Fig. 8.3p).

Perhaps the most complicated event in this journey takes place on page 16. There, Lady 3 Flint "Shell Quechuemitl" gives birth to a daughter (Fig. 8.3q). The two are surrounded by a blue circle, to the left of which appears the date: Year 3 Flint, Day 3 Flint (Fig. 8.3r). This means that the newborn girl is, like her mother, also named Lady 3 Flint. She has a different personal name, however: "Jeweled Quechquemitl." The woman named Lady 3 Flint in subsequent scenes is not always shown with a personal name, which makes it unclear which of the two Lady 3 Flints, mother or daughter, is involved in the subsequent scenes on page 17.

On page 18, a new phase of the narrative begins with the introduction of a new character: Lord 12 Wind. On the right-hand edge of page 18 appear four of the directional deities who witness the polity-foundation on page 17 (Fig. 8.3a–e). Next, a rectangular sky band is painted on the upper edge of the page, just off-center, (Fig. 8.3s). Visually, its form echoes the river glyphs we have seen on previous pages. This is not an accident. Many Mesoamerican peoples, the Ñudzavui included, believed that at the beginning of time the world was a formless mass of dark water. The gods revealed the surface of the earth by pushing some of these waters up into the heavens, creating the sky. The skyband on page 18—like the narrow strip of sky we saw in the L-shaped Place of Seven Caves on page 14—is marked with shining eyeball-stars. Its rectangular form contains, not water as with a river sign, but a round sun glyph, marked in its center with the red and blue sign for motion. The heads of two supernaturals, Lord
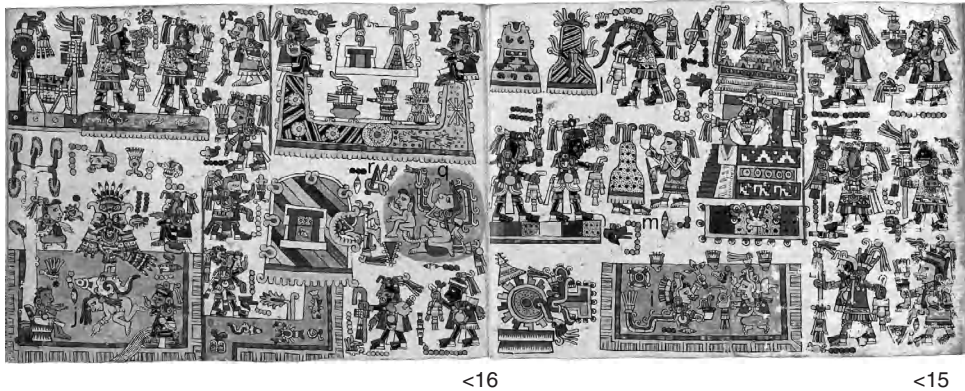
<16   <15

Figure 8.3 (*cont'd*)

4 House and Lady 5 Serpent, are drawn to either side. The skyband is further marked with a yellow-and-red cave sign, and from out of this opening emerges a white cord marked with round downy feathers. The cord serves as a path upon which Lord 12 Wind and three priestly companions descend from the heavens (Fig. 8.3t). Lord 12 Wind's first action on reaching the terrestrial world is to enter a river and make offerings to the female supernatural within it, Lady 1 Eagle (Fig. 8.3u). From there, he emerges to make offerings at the ceremonial center of the kingdom founded by Lady 3 Flint and Lord 5 Flower on the previous page (Fig. 8.3v).

An epic scene spanning the next two pages, 19a and 19b, depicts the wedding of Lord 12 Wind and Lady 3 Flint "Jeweled Quechquemitl." At the top of 19a is another sky-band. On the right is the round disk of the Motion Sun; on the left is a U-shaped moon (Fig. 8. 4a–b). As on page 18, Lord 12 Wind descends to the earth on a feathery white cord (Fig. 8.4c) accompanied by priest-companions. To the left, within the green expanse of a massive hill glyph, the snaking line of the white sky cord is echoed by the snaking line of a footprint-marked road. Here, the bride Lady 3 Flint (whose name glyph, curiously, does not appear) is carried on the back of a priest named Lord 6 Water (Fig. 8.4d). Bride and groom are married in the center of page 19b. Below, both kneel naked, facing each other, as water is poured down on them by Lady 10 House and Lady 5 Flint (women who do not appear elsewhere in the story; Fig. 8.4e). The bathing takes place at or near a White Hill of Flints, which is drawn to the left of this scene (Fig. 8.4f). Above, bride and groom are shown within a palace, facing each other under a marriage blanket (Fig. 8.4g). The scene is crowned by a procession of seven deities, who walk along the top ridge of the all-encompassing hill (Fig. 8.4h).

The newlyweds appear again in the upper-right corner of page 20, seated on jaguar thrones (Fig. 8.4i). They are followed by drawings of thirteen plant beings, probably meant to indicate their offspring (Fig. 8.4j). This is the last time Lady 3 Flint appears in the narrative. The story now shifts to focus on her husband, Lord 12 Wind.

The left half of page 20 and the right half of 21 depict an epic two-part battle. On page 20, humans and supernaturals battle striped Stone Men. On page 21, humans and supernaturals battle sky-descended red-and-white-striped Cloud Men. The battle with the Stone Men includes a number of conventions for representing warfare. Most combatants have one hand behind them, grasping a weapon (spears or, in two cases, an axe)
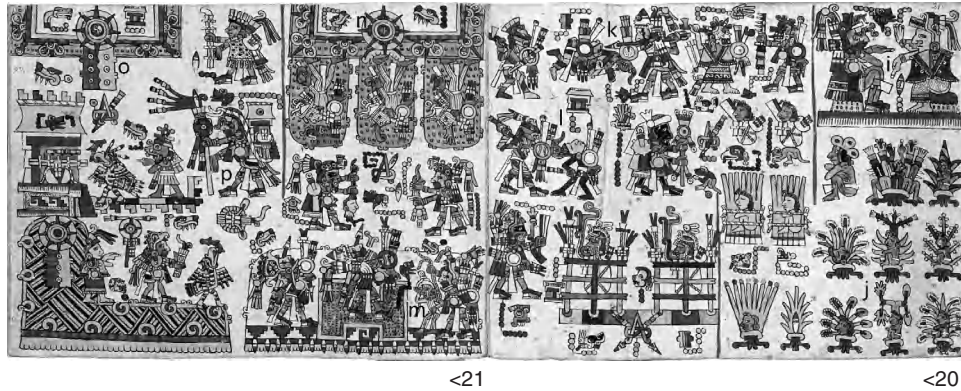
<21   <20

Figure 8.4   Pages 19 to 21 of the *Codex Nuttall*.

and one hand in front of them, holding a round shield. Two figures are shown taking prisoners. In the top row, a supernatural named Lord 9 Wind captures a striped Stone Man by grabbing his hair (Fig. 8.4k). The same gesture is repeated immediately below, where an unnamed Earth Man grabs the hair of his human prisoner, Lord 4 House (Fig. 8.4l). The costume of Lord 4 House signifies his status as prisoner. He is barefoot, wears only a loincloth, and his long hair is unbound and unornamented. Throughout Mesoamerica, these details of costume indicated captives or slaves (Houston, Stuart, and Taube 2006: 202–207). On the facing page, a sky-descended Cloud Man is captured at White Hill of Flints (Fig. 8.4m).

This two-part battle (another version of which appears earlier in the *Codex Nuttall*) probably relates to Ñudzavui ideas about ancient Covenants with Earth and Rain (Monaghan 1995).[4] According to twentieth-century Nuyootecos, at the beginnings of time an epic agreement was forged between humans, Earth, and Rain. Humans would be allowed to practice agriculture, and eat the plant children of Earth and Rain, but at a price. Men and women would have to repay their debts to Earth and Rain through sacrifice, and by burying their bodies in the ground at death. Like this Covenants story told in contemporary Ñudzavui communities, pages 20 and 21 of the *Codex Nuttall* involve a struggle between humans and manifestations of Earth and Sky. These battles also take place at the very beginnings of time. In the upper right-hand side of page 21, the red-and-white-striped Cloud Men descend from a skyband marked, as on previous pages, by a round Motion Sun (Fig. 8.4n). But in the following scene, in the upper left-hand corner of page 21, a new Sun rises into the sky. A white skull marks its center, and from below stream sparkling eye-marked red and yellow bands (Fig. 8.4o). This is the Skull Sun, the sun that burned in the sky of the Postclassic Ñudzavui "present." In other words, at the end of the two battles on pages 20 and 21, a new age of creation begins. As discussed by Davíd Carrasco, many Mesoamerican peoples believed in the creation and destruction of several different eras before the present, each era marked by its own distinct sun.[5] What page 21 of the *Nuttall* shows, then, is the transition from the age of creation of the Motion Sun to the age of creation of the Skull Sun.

The events that take place beneath this Skull Sun reinforce the theme of foundation and new beginnings. On page 21, Lord 12 Wind and a priestly companion are shown
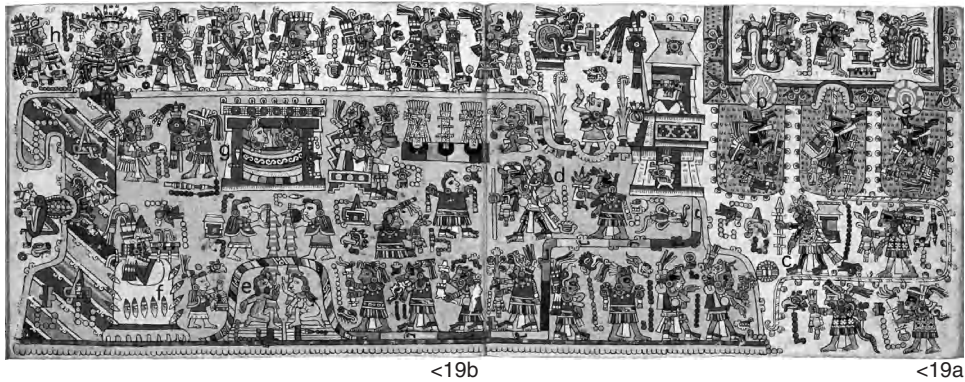
<19b   <19a

Figure 8.4 (*cont'd*)

before the temple, sacred bundle, and fire drill of *Ñuu Ndecu* (Achiutla). This was an important kingdom and oracular center when the Europeans arrived in the 1520s (Fig. 8.4p). On page 22, the final page in this narrative, Lord 12 Wind and his priestly companions establish the kingdom of *Ñuu Tnoo* (Tilantongo) by bringing to it a temple and sacred bundle (Fig. 8.5a). As on pages 19a and 19b, page 22 is dominated by a green hill which encompasses a number of smaller place signs. The most interesting detail for our purposes is the black summit, itself crowned by two platforms on which a man and a woman are seated (Fig. 8.5b). The black summit represents *Yucu Tnoo*, Black Hill, in the shadow of which is the town of *Ñuu Tnoo* (represented by the small building with a black and white frieze; Fig. 8.5c). When the Europeans arrived in Oaxaca, the royal lineage of *Ñuu Tnoo* was said to be the most prestigious in the region. Significantly, an important Formative Period settlement (650 BC–200 BC) had existed on the summit of *Yucu Tnoo*. Archaeological evidence suggests that even after it had been abandoned, people continued to climb up and leave offerings amidst the ruins (Spores 1967: 42). The architectural platforms painted on the black summit of page 22 probably refer to this ruined city, perhaps understood by the Postclassic Ñudzavui as a physical reminder of the previous age of creation that had been destroyed by the dawning of the Skull Sun (Hamann 2008).[6]

The story of Lady 3 Flint "Shell Quechquemitl," Lady 3 Flint "Jeweled Quechquemitl," Lord 5 Flower, and Lord 12 Wind takes place just before, and just after, the dawning of the Skull Sun's age of creation. When the *Codex Nuttall* was created around the 1400s, these ancient events were believed to have taken place some five centuries earlier. The Ñudzavui continued to paint screenfold histories after the arrival of the Europeans. Although the images of these posthispanic documents are less elaborate than those of the *Nuttall*, the same basic communicative system was used, and calendar glyphs record events taking place as late as 1560 (in the case of the *Codex Selden*).[7] In the next section we consider a pictorial document created in posthispanic Mesoamerica—but one created, not in Oaxaca, but in the town of Tlaxcala in central Mexico. Many of the aesthetic and communicative features of the *Codex Nuttall* also appear in the *Lienzo de Tlaxcala*: place signs, gendered costumes, glyphic personal names, conventions for combat. But there are distinctions as well. The *Lienzo* was created by a different ethnic group with a different history, and its artists, working around 1552, incorporated European forms into their repertoire of signs.
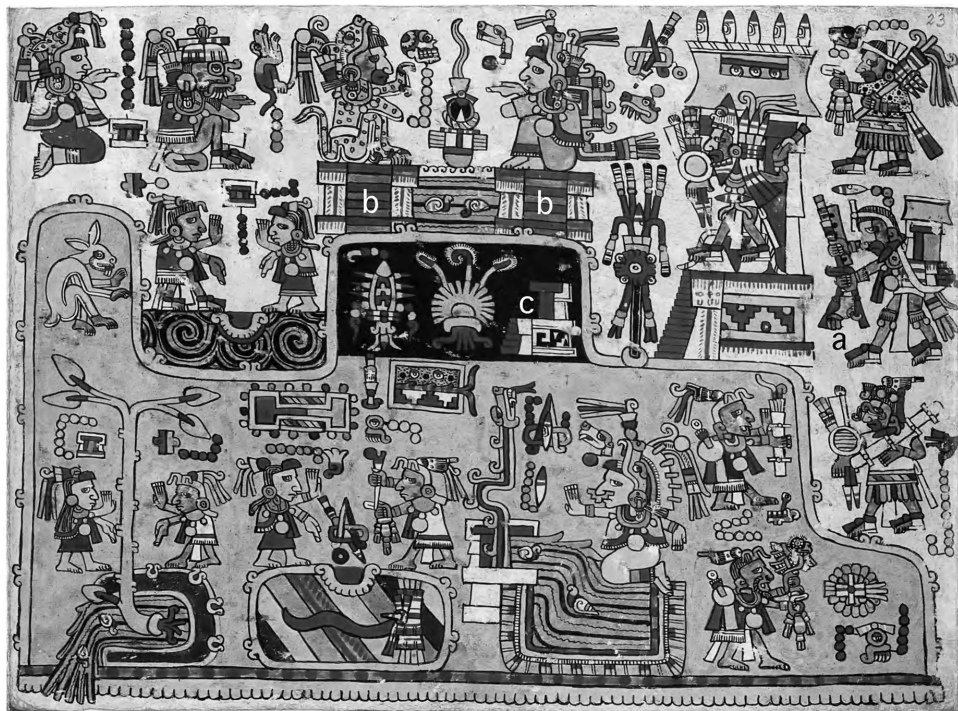
Figure 8.5   Page 22 of the *Codex Nuttall*.

Up Close: The *Lienzo de Tlaxcala*

The *Lienzo de Tlaxcala* was a painted cotton sheet around two meters wide and five meters long (Fig. 8.6). At the top was a large scene outlining the political structure of the kingdom of Tlaxcala. Below, black lines divided the remaining cloth into a seven by thirteen grid, and in its cells were painted scenes narrating the history of Tlaxcala's alliance with the Europeans and their joint defeat of the Aztec empire. This began with the conquest of the island capital of Tenochtitlan, and then expanded in separate battle campaigns across Mesoamerica, up to Michoacan in the north and down to Guatemala in the south. The *Lienzo* was probably painted in 1552. The town council minutes from Tlaxcala in September of that year mention plans to create a painted history of the Tlaxcalan–European alliance, with the goal of sending it across the Atlantic to be seen by Emperor Charles V (Kranz 2001: 67–68). We don't know if this ever happened, but it was certainly possible. The Tlaxcalans sent a number of delegations to Europe throughout the sixteenth century, the earliest in 1528 (Gibson 1952: 164–167; Cline 1969).[8] An eighteenth-century source suggests that as many as three copies of the *Lienzo* may have originally been made (Chavero 1892: iv; Kranz 2001: 70).

During the occupation of Mexico by France (1862–1867), the French Scientific Commission took the *Lienzo* from Tlaxcala to Mexico City to make a copy. After the fall of Emperor Maximilian and the restoration of Mexican independence, the Tlaxcalans attempted to regain their stolen textile—but it had disappeared. It remains lost. A tracing from the original had been made, however, and in 1892 this was used to create a lithograph edition of the *Lienzo* as part of Mexico's contribution to the Exposición
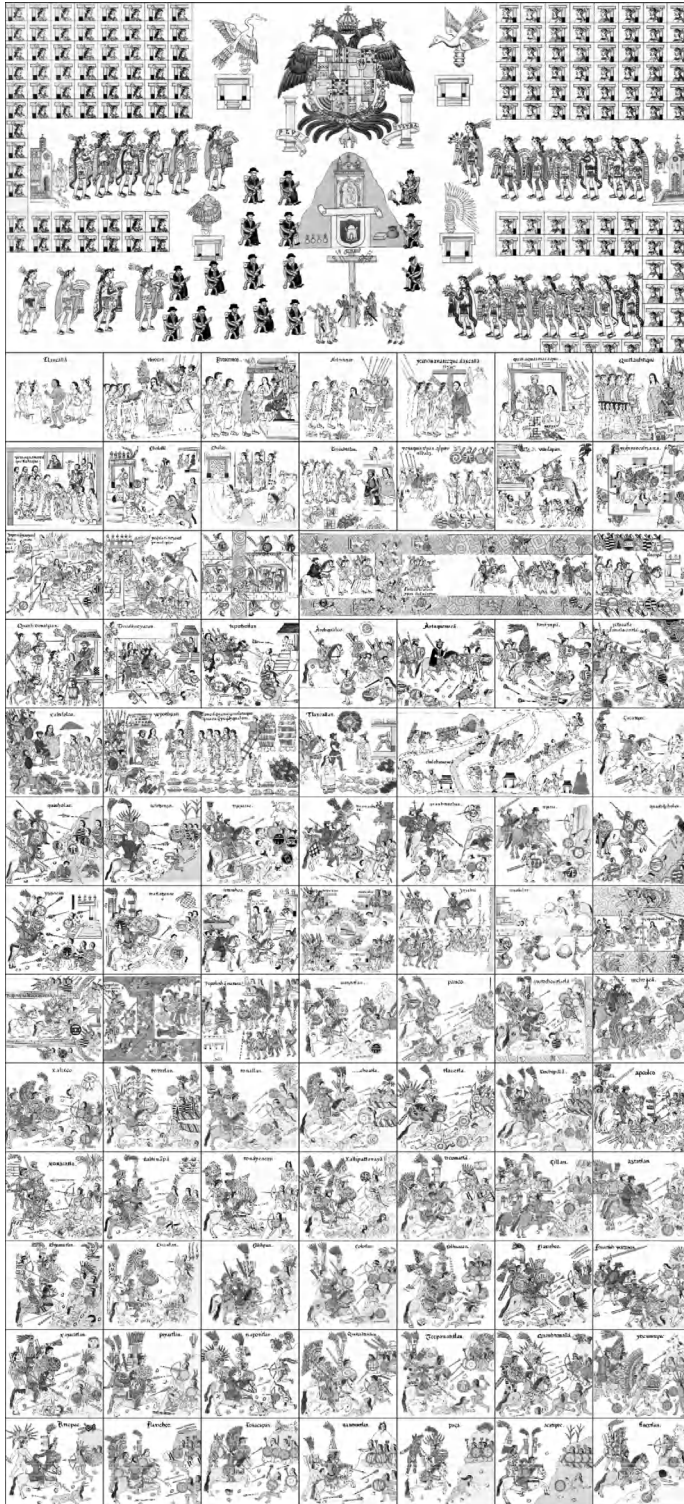
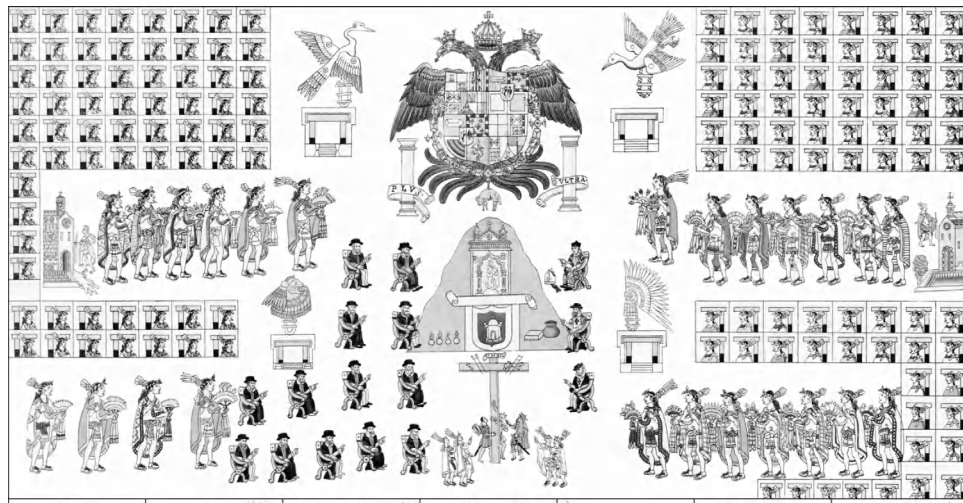**Figure 8.6** Overview of the *Lienzo de Tlaxcala*.

Figure 8.7   Top scene of the *Lienzo de Tlaxcala*.

Historico-Americana in Madrid (an international World's Fair celebrating the 400th anniversary of Columbus' arrival in the Americas; Chavero 1892: iv–v). The tracings on which this edition were made are now themselves also lost, and so the lithographs are our best record of the vanished sixteenth-century *Lienzo*. The images illustrating the *Lienzo* which appear on the following pages are taken from a digital reconstruction we have created based on the 1892 lithographs.[9]

The large scene at the top of the *Lienzo* presents a schematic map of the structure of the kingdom of Tlaxcala in the mid-sixteenth century (Fig. 8.7). It is centered on a green bell-shaped hill glyph, not unlike the hill glyphs also used in the *Codex Nuttall* (Fig. 8.7a). This may refer to a specific peak that dominates the Valley of Tlaxcala: La Malinche. (The name Malinche is a Nahuatl transformation of the Spanish name *María*). But instead of marking this hill with tortillas to link it to Tlaxcala (Tlaxcala means "Place of the Tortillas" in Nahuatl), the mountain is marked with signs of Tlaxcala's conversion to Christianity and incorporation into the Hapsburg Empire. Inside the mountain are a church with an image of the Virgin Mary (the Virgin of the Assumption, patroness of Tlaxcala; Fig 8.7b) as well as a coat of arms granted by Charles V to Tlaxcala in 1535 (Fig. 8.7c).

Tlaxcala's identity as a Christian kingdom within the Hapsburg Empire is underscored by the images drawn above and below this central hill. At the top of the *Lienzo* is the coat of arms of the Emperor Charles V, backed by the double-headed eagle of the Hapsburgs (Fig. 8.7d). Below, a group of seven men erects a cross. Three are European, and four are Tlaxcalan. The manner in which they are drawn illustrates the complex ways the artists of the *Lienzo* combined both Mesoamerican and European modes of expression. To the left of the cross, all three men—two Tlaxcalans, one European—are drawn in profile (Fig. 8.7e). This, as we saw in the *Codex Nuttall*, was the standard form for representing human bodies in the Postclassic International Style. The two Tlaxcalans can be identified as men by their loincloths; they also wear capes, sandals, feather headdresses, and an elaborate twisted headband, tied at the forehead, which was a distinctive sign of Tlaxcalan nobility. To their right stands a European man. Although dressed in

hose and a doublet, brimmed hat hanging off his shoulders, he is drawn in profile, fol-
lowing prehispanic conventions. To the right of the cross, however, the artists used
European forms, presenting all four figures—two European men and two Tlaxcalan
lords—not in profile, but in a 3/4 perspective (Fig. 8.7f). Throughout the *Lienzo*,
Tlaxcalan artists selectively used profile versus 3/4 views for different characters, well
aware of their distinctive origins in Mesoamerican and European visual traditions.

Surrounding the cross and hill are sixteen European men, all seated on folding chairs
and all drawn in a 3/4 view. The three to the right of the cross can be identified by their
clothing. First is the bishop of Mexico, Sebastián Ramírez de Fuenleal. His miter is drawn
before him like a glyphic personal name (Fig 8.7g). Below the bishop are the first
two viceroys of Mexico, Antonio de Mendoza and Luis de Velasco. The red crosses
on their chests indicate that both men are knights of the Order of Santiago
(Fig. 8.7h–i). To the left, in contrast, none of the thirteen men in black have any
distinguishing marks (Fig. 8.7j). They are all identical. Because thirteen was an important
number in prehispanic Mesoamerica (in contrast to its unlucky status in Europe, where
twelve was more important; Tedlock 2003: 187–206), these thirteen men may be meant
to represent general manifestations of European power, and not particular individuals.[10]
Overall, these men present a fascinating visual tension. Although drawn according to
European modes of representation, they are nevertheless numbered according to
Mesoamerican tastes. Furthermore, they are drawn in a visual grid of horizontal and ver-
tical alignments, a style of arranging glyphic information with a centuries-old history in
Mesoamerica. On the surface these figures appear fully European, but they are embedded
in deeply Mesoamerican structures.

Moving outward from these central images, the rest of this enormous scene is divided
into four sections, representing the four main divisions of the kingdom of Tlaxcala. Each
division has its own main building (prehispanic in style with post-and-lintel entryways)
ornamented with a feathered battle standard attached to a U-shaped rack. As is shown in
the scenes of conquest below, such standards would be strapped to the backs of warriors
before combat. In clockwise order, these represent Ocotelolco (with an eagle battle
standard; Fig. 8.7k), Quiahuiztlan (with a quetzal feather battle standard; Fig. 8.7l),
Tepeticpac (with a Xolotl-dog battle standard; Fig. 8.7m), and Tizatlán (with a heron
battle standard; Fig. 8.7n). Associated with each of the four divisions is a procession of
Tlaxcalan noblemen, carrying flowers and wearing loincloths, elaborate capes, and
twisted red and white headbands (Fig. 8.7o–r). In contrast to the sixteen seated
Europeans, these Tlaxcalan nobles are drawn in profile. Each of the four divisions also
has a number of grid-arranged houses, drawn in profile and containing the profiled head
of a noble. These probably represent the number of *teccalli*, noble houses, that belonged
to each of the four divisions of Tlaxcala.

In sum, this scene has a five-part structure. A central axis merging European and
Mesoamerican traditions is surrounded by four subdivisions predominantly Mesoamerican
in style. This five-part structure is extremely significant. People throughout Mesoamerica
conceived of their universe as divided into five directions: North, South, East, West, and
Center. As we saw on page 17 of the *Codex Nuttall*, and as Davíd Carrasco discusses in
detail, references to the cardinal directions were an important aspect of foundational ritu-
als throughout Mesoamerica.[11] The main scene of the *Lienzo de Tlaxcala*, then, presents
the kingdom of Tlaxcala as perfectly, cosmologically ordered.

If the *Lienzo*'s main scene presents an idealized map of the kingdom of Tlaxcala
around 1552, the smaller scenes below travel back in time to 1519, in order to tell the

Figure 8.8   Cells 1 and 2 of the *Lienzo de Tlaxcala*.

story of the Tlaxcalans' alliance with the Spaniards and their joint defeat of the Aztecs. The Aztecs, it should be stressed, were traditional enemies of the Tlaxcalans. Tlaxcala was one of the few polities in Central Mexico to resist conquest by the Aztecs and incorporation into their empire. Because of this, the Tlaxcalans played a key role in overthrowing that empire when the Europeans arrived. The story of this conquest is presented in nearly a hundred small scenes embedded in a seven by thirteen grid. These proportions are significant. As Gordon Brotherston and Ana Gallegos have pointed out (1990: 122), 7 times 13 equals 91, which is the sum of all of the numbers 1 to 13 (1 + 2 + 3 + 4 + 5 + 6 + 7 + 8 + 9 + 10 + 11 + 12 + 13 = 91). Yet despite this very Mesoamerican format, the reading order of these cells is strongly shaped by traditions imported from Europe. The narrative moves across the cells from left to right, from top to bottom, one row at a time. In other words, the *Lienzo* uses the reading order found in European alphabetic books. This, perhaps, is not a surprise, given that at least one copy of the *Lienzo* was probably painted to be read in Spain by Charles V, the Emperor whose shield crowns the entire document.

    The cell-by-cell narrative begins, like an alphabetic page, in the upper left-hand corner. The very first cell is labeled "Tlaxcallan" in alphabetic script, to indicate where the scene is taking place. Inside are the rulers of Tlaxcala's four main subdivisions, who receive a letter sent by Cortés. The four men are wrapped in elaborate cloaks, and three wear the twisted red and white headband we discussed above. The messenger, standing in the center, holds out this letter on a stick. Significantly, his appearance stresses that he is not Tlaxcalan. His long hair is unbound; he wears only a loincloth and no cape; his face is tattooed or scarified. Indeed, his near nakedness suggests he is a commoner, a prisoner, or a slave. Remember that when Lord 4 House was taken captive by a Stone Man on page 20 of the *Codex Nuttall*, he was drawn barefoot, wearing only a loincloth, and with his long hair unornamented. Curiously, this messenger's depiction as a social subordinate contrasts with Hernán Cortés' account of the event. He claims that *several* indigenous messengers were sent to Tlaxcala, and that they were noblemen (Chavero 1892: 13–14).[12]

    The next scene takes place in Yliyocan, "Place of Many Alder Trees." Visually, this is indicated by the drawing of a tree (Fig. 8.8a). Here Cortés enters the territory of Tlaxcala.
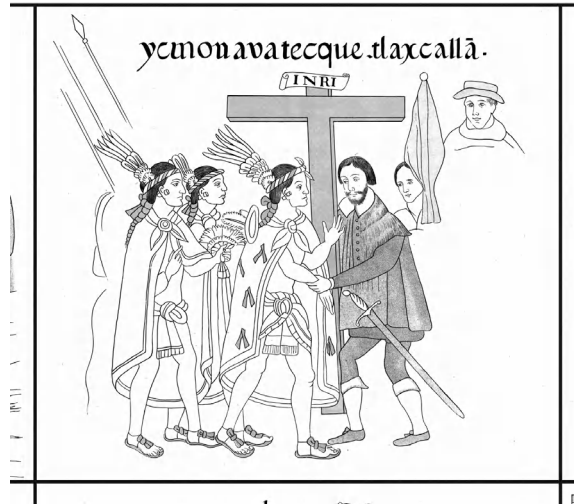
Figure 8.9 Cell 5 of the *Lienzo de Tlaxcala*.

Tlaxcala was a multi-ethnic kingdom, home not only to Nahuas but also to Otomi. In this scene, Otomi nobles are distinguished from Tlaxcalans by their feathered headbands (Fig. 8.8b). At the very center of this cell stands a woman (Fig. 8.8c). She wears a long dress covering her legs and a cape-like blouse; the *Lienzo*'s artists have taken time to indicate that both skirt and blouse are made of richly-woven textiles. But this woman does not wear indigenous sandals: she wears closed European shoes. The combination of European and Mesoamerican dress is important. This is Doña Marina or Malinche, the indigenous woman who translated for Cortés (speaking Maya, Nahuatl, and, eventually, Spanish). Malinche will be a key character in the *Lienzo*: her linguistic (and diplomatic) skills made European-indigenous alliances *possible*. Indeed, so important was Malinche to European-indigenous interactions, and so closely was she connected to Cortés, that indigenous people sometimes thought that Cortés was *named* Malinche (Peterson 1994: 188). The connection linking Malinche and Cortés is subtly shown in this scene by the use of perspective. All of the Otomi nobles, and both of the anonymous Spanish soldiers, are drawn in profile. In contrast, Malinche and Cortés are both drawn in a 3/4 view (Fig. 8.8c–d).

The following scenes track the travels of Malinche, Cortés, and the European army deeper into the kingdom of Tlaxcala. The *Lienzo* records this journey as one of peaceful gift-giving. Other accounts tell a different story. Some alphabetic sources report that the Europeans fought several skirmishes with the Tlaxcalans. Others record debates among the Tlaxcalan nobility about whether or not to form an alliance with the invaders (Chavero 1892: 16–17). The *Lienzo*, in other words, tells a carefully edited version of events.

In cell 5, Cortes meets three of the rulers of Tlaxcala (Fig. 8.9). A cross divides the scene in two. As with the cross in the large scene above it, to the left people are drawn in profile, and to the right Cortés, Malinche, and a friar are drawn in 3/4 view. The official conversion of the Tlaxcalans to Christianity is shown in cell 8. Visually, the scene shows the new converts receiving communion, kneeling before the consecrated Host. The alphabetic gloss in Nahuatl, however (one of several glosses longer than a single place name) speaks of baptism (Fig. 8.10a).
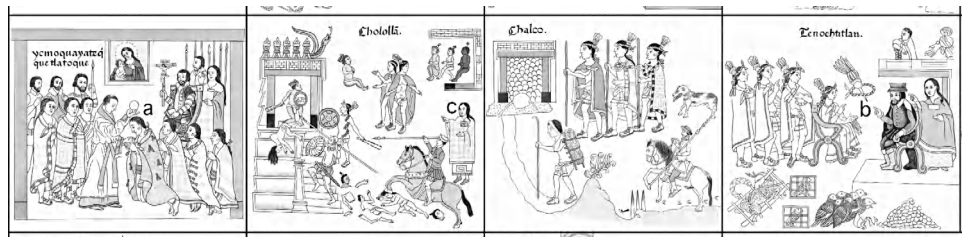
Figure 8.10   Cells 8 to 11 of the *Lienzo de Tlaxcala*.
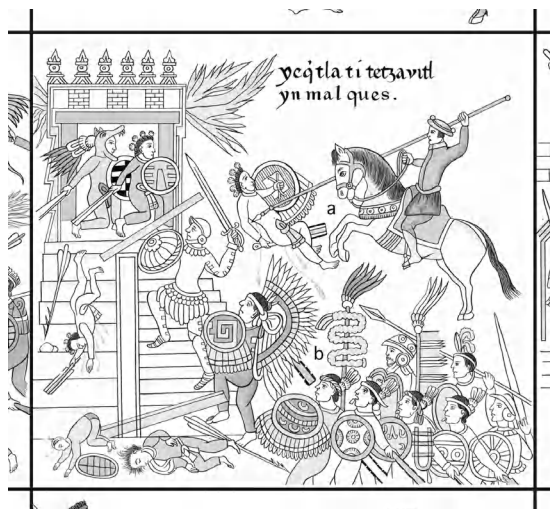
Figure 8.11   Cell 16 of the *Lienzo de Tlaxcala*.

With the Tlaxcalan nobles Christianized, the joint Tlaxcalan–European army sets out for Tenochtitlan, the Aztec capital. The next two cells, 9 and 10, record events that took place en route, in Cholula and Chalco. Cell 11 takes place in the Aztec capital itself (Fig. 8.10b). Labeled "Tenochtitlan," it shows the meeting of Cortés and Malinche with the Aztec emperor Moctezuma. Once again, the faces of Native American noblemen are drawn in profile, and those of Malinche and Cortés in 3/4 view. Moctezuma would be taken hostage; the scenes after cell 11 show the escalating tensions between the invaders and the Aztecs. Cells 14, 15, and 16 show skirmishes within Tenochtitlan, using an iconography of warfare that will be increasingly important as the *Lienzo*'s narrative progresses. A mounted Spanish warrior tramples fallen enemies (Fig. 8.11a) and around him fight indigenous warriors dressed in feathered bodysuits. Battle standards are strapped on their backs, and they wield obsidian-bladed swords in their hands (Fig. 8.11b).

Outnumbered and surrounded, the Spaniards and their indigenous allies finally flee Tenochtitlan at night, crossing one of the causeways across Lake Texcoco that linked the island to the mainland. The events of this *Noche Triste* (Sad Night, as the Spaniards called it) are shown in an enormous scene spanning four cells, strikingly framed in swirling blue water (Fig 8.12). The invaders then fight their way back to Tlaxcala across a number of scenes. Once safely in Tlaxcala the Europeans (and their horses) rest and receive generous gifts of food (Fig 8.13a). Then the invaders set off for Tenochtitlan a second time, fighting
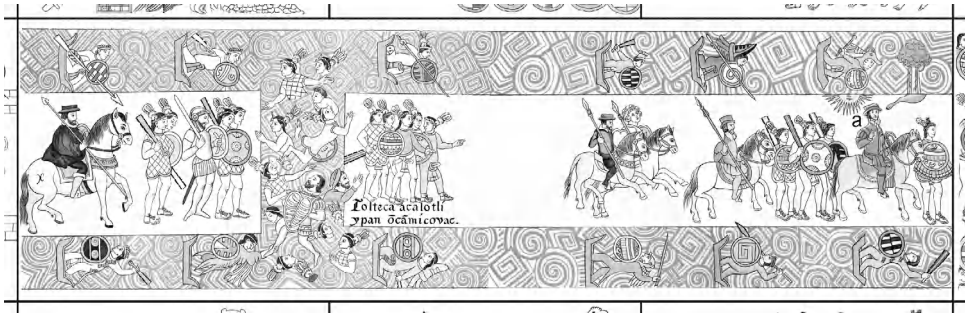
Figure 8.12 Cell 18 of the *Lienzo de Tlaxcala*.
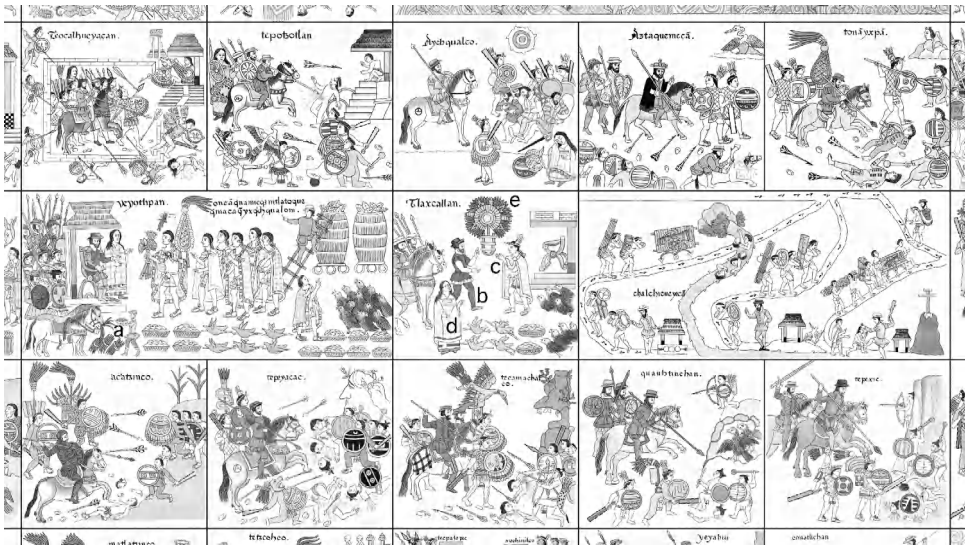
Figure 8.13 Cells 28 to 30 of the *Lienzo de Tlaxcala* (center row), with cells 21 to 25 above and cells 33 to 37 below.

their way back to the shores of Lake Texcoco (cell 42; Fig. 8.14a). The five scenes after cell 42 show the battles for Tenochtitlan. Cell 43 includes a fascinating vignette of hand-to-hand combat, in which a European takes an Aztec warrior captive by grabbing his hair. This, as we saw in the *Codex Nuttall*, is a prehispanic iconographic convention (Fig. 8.14b). The campaign ends in victory for the invaders. Cell 48 shows Cortés enthroned, a panache of quetzal plumes ornamenting his brimmed felt hat (Fig. 8.15a). Aztec nobles surrender before him (Fig. 8.15b). The Nahuatl gloss at the top of this cell reads *Yc poliuhque mexica*: "Thus the Mexica [Aztecs] were vanquished."

The 39 cells which follow the fall of Tenochtitlan (almost half of the *Lienzo*) are devoted exclusively (and repetitively) to scenes of battle. They follow different campaigns as the Europeans and their Tlaxcalan allies set out to conquer the rest of the Aztec empire: traveling north to Michoacan and south to Guatemala. Over and over, the same basic template is repeated. To the left is the army of the invaders, mostly indigenous but led by a European mounted on a horse (Fig. 8.15c). He brandishes a spear, and his steed tramples enemy bodies underfoot. To the right is the rival indigenous army of the place being conquered
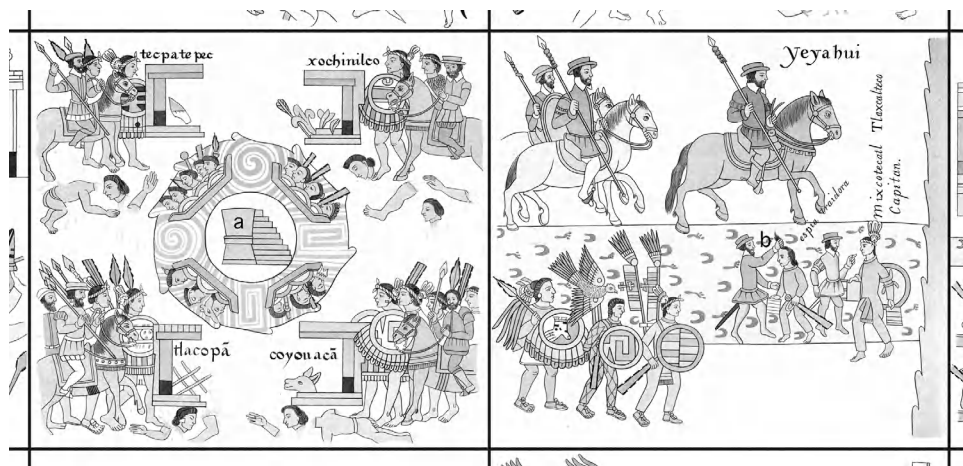
Figure 8.14   Cells 42 and 42 of the *Lienzo de Tlaxcala*.
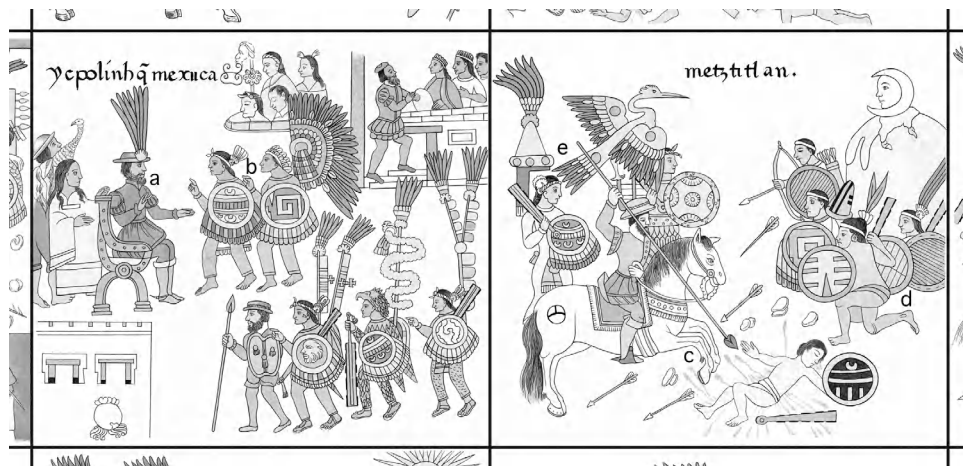
Figure 8.15   Cells 48 and 49 of the *Lienzo de Tlaxcala*.

(Fig. 8.15d). Significantly, these indigenous enemies are usually dressed only in loincloths, in contrast to the feathered bodysuits and splendid battle standards of the Tlaxcalan warriors (Fig. 8.15e). As we saw above, this visually relegates the non-Tlaxcalans to a subordinate status. At the right edge of each cell appears a place glyph indicating where the battle is taking place, always a hill ornamented (as in the *Codex Nuttall*) with further glyphs to specify *which* place is being named (Fig. 8.15f). In addition to this pictorial place sign, all of these cells are alphabetically labeled with a place name as well.

This rapid overview of the *Lienzo*'s narrative shows how Nahua artists, working around 1552, drew upon a number of visual conventions that they inherited from the prehispanic past, conventions we also saw in the *Codex Nuttall*. These include methods of drawing place glyphs and buildings, the use of costume to differentiate men from women, and even visual conventions for representing warfare and class. But there is one major category of glyphic information found in the *Codex Nuttall* which does not appear in the *Lienzo*:

Figure 8.16 Cells 15, 20, and 27 of the *Lienzo de Tlaxcala*.

calendric glyphs. Like the Ñudzavui, the prehispanic Nahuas counted a 260-day ritual calendar and a 365-day solar year. Nahuas and Ñudzavui used the same basic system of dots and glyphs to represent dates. Indeed, several famous prehispanic divinatory alma-nacs (including the *Codex Borgia* and the *Codex Cospi*), filled with calendric information, were probably painted in the kingdom of Tlaxcala by Tlaxcalan artists (Boone 2007: 228). So why does the *Lienzo* contain no year or day glyphs?

There are several possible explanations for this absence. First, before the Europeans arrived it seems that the Nahuas (like the Ñudzavui) had two types of names. They received calendric names related to the day of their birth, but also had non-calendric personal names as well. In contrast to the Ñudzavui, however, the Nahuas seem to have kept their calendric names secret. Instead—at least in written documents—they were referred to only by their non-calendric personal names (McKeever Furst 1995: 81). The suppression of calendric names seems to have been a *prehispanic* Nahua tradition. In the *Lienzo*, personal name glyphs are used frequently, and they are applied to both Nahuas and Europeans. In the main scene at the top of the *Lienzo*, a miter is used to mark the bishop of Mexico. Another European is given a glyphic personal name in cell 18. Because conquistador Pedro de Alvarado had blond hair, Nahua speakers referred to him as *Tonatiuh*, "Sun." The mounted European with a large sun blazing behind his head in the scene of the *Noche Triste* probably represents to Alvarado (Fig. 8.12a). At least five indigenous people are also given personal names in the *Lienzo*. In cell 27, the drawing of an eight-pointed star with puffs of smoke below it names Lord Citlalpopoca, "Smoking Star" (Fig. 8.16c; see also cells 11, 18, 28, 48).
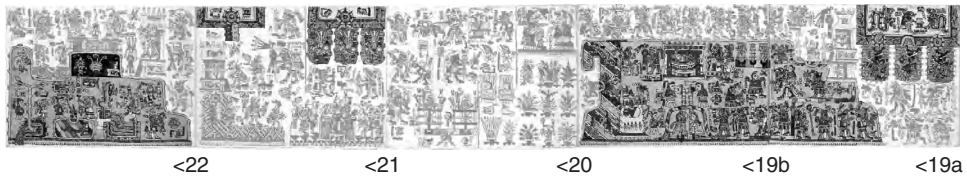
Figure 8.17   Macrocomposition in the *Codex Nuttall*: rivers and skybands on pages 14 to 22.

At only one point in the *Lienzo* does a calendric glyph appear, used to indicate time. Unlike the Ñudzavui, the Nahuas glyphically recorded the 18 twenty-day months of their solar year. One of these month glyphs appears in cell 15 of the *Lienzo*: the gourd bowl representing the month of Etzalcualiztli (Fig. 8.16a). According to European accounts, this scene—one of the events leading to the *Noche Triste*—took place in late June 1520. Not surprisingly, the month of Etzalcualiztli ran from June 9 to June 28 in the Gregorian calendar. But this reference to Etzalcualiztli is a unique exception. The lack of other temporal references in the *Lienzo* (again, prehispanic screenfolds from Tlaxcala are full of date glyphs) may have two explanations. First, as both Barbara Tedlock and Anthony Aveni stress, the prehispanic calendar was used for divination. The connection of the prehispanic calendar to occult knowledge may have been a reason that Christian Tlaxcalans did not want to use it in a history painted for Charles V. But apart from its connection to divination, the indigenous calendar was one that most Europeans did not understand. The artists of the *Lienzo* may have felt that such details would be distracting in the eyes of a European audience. Indeed, we have already seen how most cells of the *Lienzo* are alphabetically labeled to make it easier for European readers (unfamiliar with the conventions of Mesoamerican place glyphs) to understand *where* scenes were taking place.

But if the artists of the *Lienzo* made a number of concessions for European readers (a Western-book-inspired reading order, suppression of calendric information), they nevertheless included information that would have been difficult for European viewers to understand. Several cells, as we have seen, contain short glosses in Nahuatl conveying more information than simple geographic names. The artists also encoded information in a manner that engaged with Mesoamerican strategies of seeing—information that, until now, has been ignored. As we mentioned above, three copies of the *Lienzo* may have been painted in the sixteenth century. One was to be sent to Europe, but two others were to stay in the New World. One copy was still in Tlaxcala until the mid-nineteenth century. The *Lienzo* was created for both European *and* Tlaxcalan eyes. In the next section we consider features of its composition that connect to deep Mesoamerican traditions, features that would have been difficult to see using Western techniques of reading.

At a Distance

Reading, like writing, is a situated practice. When people read, they do so within the literacy traditions of a particular time and place. So far, our discussions of the *Codex Nuttall* and *Lienzo de Tlaxcala* have viewed these documents with the reading methods used for Western spine-bound books. As you read the alphabetic text of this chapter, your eyes and mind move from word to word, line to line, page to page. In the same way, our discussions of both the *Codex Nuttall* and *Lienzo de Tlaxcala* have moved from image to image, vignette to vignette, and page to page or cell to cell.
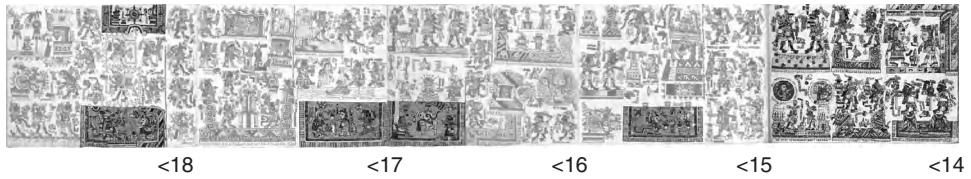
<18   <17   <16   <15   <14

Figure 8.17   (*cont'd*)

But both the *Codex Nuttall* and the *Lienzo de Tlaxcala* are complex objects, very different from the spine-bound volumes that fill bookshelves today. The screenfold format of the *Codex Nuttall* allows viewers to look at multiple pages at once. Indeed, as John Pohl has argued, several sources suggest that the Ñudzavui screenfolds were displayed unfurled on the walls of palaces, their contents performed to an audience.[13] Similarly, the *Lienzo de Tlaxcala* was meant to be unfurled and displayed in full on a wall. By viewing both of these documents "at a distance," looking at multiple pages or cells at once, we can see visual patterns that reinforce and expand the meanings we find when reading their surfaces up close, image to image. For the rest of this chapter, we consider the "macrocompositions" recorded in both the *Nuttall* and *Lienzo*. Paying attention to these large visual patterns amounts to a kind of "ethno-reading," an experience of particularly Mesoamerican modes of literacy. This aspect of Mesoamerican writing has received little attention up until now.

First, let's return to *Codex Nuttall*. The ten pages that begin with Lady 3 Flint and Lord 5 Flower have a roughly parallel structure. The narrative starts on page 14 and ends on page 22 with large geographic scenes, undivided by red guidelines. A massive landscape is also found just off-center, at pages 19a and 19b. We can see an even stronger pattern of mirrored, parallel composition by focusing on the locations of rivers and skybands (Fig. 8.17). As we mentioned above, the representations of rivers and skybands are quite similar. Both are rectangular U-shaped containers: green walls contain blue water in the case of rivers; blue walls contain white space in the case of skybands. Given Mesoamerican ideas about the creation of the world, these visual parallels are probably no accident. Rivers are channels for terrestrial water; skybands contain the celestial water forced into the heavens at the creation of the world.

Now look at pages 14 to 22 again, but all at once. It is striking that four rivers are depicted in the first half of the document, along the bottom edge, and that four skybands are depicted in the second half of the document, running across the top edge. Moreover, these depictions of rivers and skybands have a symmetrical, parallel composition. Moving from left to right, the river at the bottom center of page 15 is followed by roughly a page-length of space before the next river, in the lower left-hand corner of page 16. A second river follows immediately in the lower-right hand corner of page 17, followed yet again by a roughly page-length space before a fourth river appears in the middle of page 18. The visual pattern, then, is river-space-river-river-space-river.

A similar rhythmic symmetry is found in the *Nuttall*'s depiction of skybands. It is not by accident that the first skyband of this sequence appears on page 18, directly above the final river. After a half a page of space, a second skyband appears in the upper right hand corner of page 19a, its blue rectangular space expanded by the blue ovals of darkness or rain that surround the descending Lord 12 Wind and his two companions. Two and a half pages then pass before the next skyband, at the upper right corner of page 22. As

with the skyband on page 19a, the one on page 21 is visually expanded by the blue ovals surrounding three descending figures: in this case, Cloud Men. A small amount of space then separates this skyband from the fourth skyband in the sequence, located in the upper left-hand corner of page 21. The visual pattern here, then, is skyband-small space-skyband-large space-skyband-small space-skyband.

The first half of these ten pages features blue rectangular rivers; the second half features blue rectangular skybands. On page 18 the last river occurs exactly below the first skyband. This is the approximate center of the ten-page spread. Page 18, as we discussed above, is where the narrative introduces Lord 12 Wind, an important new character who will ultimately replace Lady 3 Flint as the story's main protagonist. Page 18 shows Lord 12 Wind descending on a feathered cord from a skyband. His first action is to enter a river and make offerings to the goddess within (Fig. 8.3u). In the previous pages, it was always Lady 3 Flint who entered rivers to interact with lacustrine supernaturals. By entering a river on page 18, Lord 12 Wind takes over a type of ritual action previously performed by Lady 3 Flint. On the following pages, Lord 12 Wind marries Lady 3 Flint (Fig. 8.4e and g; Fig. 8.5a), and right after their wedding Lady 3 Flint disappears from the story. Lord 12 Wind is the protagonist on the final pages, traveling and founding kingdoms (as Lady 3 Flint and Lord 5 Flower had done) beneath the light of a newly dawning Skull Sun.

The overall story of pages 14 to 22 of the *Codex Nuttall*, then, begins with the peregrinations and kingdom-foundations of the earth-emerged Lady 3 Flint "Shell Quechquemitl" and Lord 5 Flower. In the middle sections of the narrative, it tells how Lady 3 Flint "Jeweled Quechquemitl" marries the sky-descended Lord 12 Wind. The final sections of the narrative tell of a war between Humans, Stone Men, and Cloud Men, and then of the peregrinations and kingdom-foundations of the sky-descended Lord 12 Wind. The narrative shifts from an earth-emerged woman and her daughter to a sky-descended man.[14] Given the broadly gendered nature of the narrative's progression, it is no surprise that this theme is visually underscored by the pattern of rivers (earthly water) and skybands (celestial water) whose parallel four-part structures meet at the center of the narrative. The blue expanses of these rivers and skybands jump out at the viewer when viewed together, from a distance. In contrast, their parallel composition is eclipsed if one reads the *Codex Nuttall* following only techniques learned from Western spine-bound books: one image at a time, one page at a time.

Similar revelations appear when the *Lienzo de Tlaxcala* is looked at "from a distance." When the lithographed facsimile edition was created in 1892, each "cell" was published as a separate scene, on a separate plate of paper. Each cell was reproduced in isolation, surrounded by an ocean of blank whiteness. These scenes are often reproduced today as images of the early colonial world, but always in isolation. By digitally knitting these scenes together again, important patterns emerge—and fundamentally transform our understanding of this indigenous account of the conquest of Mexico.[15]

As mentioned above, the main surface of the *Lienzo* was divided into a seven by thirteen grid. This format creates a central column (the fourth), a central row (the seventh), and thus a central cell within the grid as a whole: the forty-second. Compositionally, this central cell's contents are unusual—so visually striking that this cell is easily picked out when viewed from a distance (Fig. 8.14a, Fig 8.18a). Yet previous reproductions of the *Lienzo*, by publishing its vignettes as isolated pages, have totally obscured the centrality of this scene, and its visual impact when seen in the document as a whole. At the center is an architectural platform on a round island, surrounded by a round lake, and framed

on four sides by lakeshore communities. This is a schematic map of Lake Texcoco and its central island—the island on which Tenochtitlan was built. As we have seen, much of the *Lienzo*'s narrative is about how an alliance of Tlaxcalans and Europeans conquered the Aztec empire: fighting their way to its capital city, retreating in defeat, coming back a second time for victory, and then spreading out across Mesoamerica to conquer the provinces once ruled from Tenochtitlan. Cell 42 shows the beginning of the second, successful assault on the Aztec capital.

Tenochtitlan was the dominant political power in late prehispanic Mesoamerica. It was the capital of an empire that encompassed close to twenty-five million people. Its importance is therefore signaled by its physical position at the exact center of the *Lienzo*'s grid. By stressing the centrality and importance of Tenochtitlan, the authors of the *Lienzo* underscored the magnitude of what they—the Tlaxcalans—had helped the Europeans to conquer. Furthermore, both Gordon Brotherston (1994: 92–93) and Diana Magaloni (2003: 28–29), working with this cell in isolation, have noted that its contents are laid out like a model of the five directions: a central platform surrounded by four massed groupings of warriors. As we saw in the foundation scene on page 17 of the *Codex Nuttall*, and as echoed in the main scene at the top of the *Lienzo*, references to the five cardinal directions were an important aspect of foundational rituals throughout Mesoamerica. The conquest of Tenochtitlan, then, sets the foundation for a new colonial order—an order that the Tlaxcalans helped the Europeans to create.

But the *Lienzo*, of course, is centered on Tlaxcala's history. And so it is not surprising that its authors embedded a *second center* within its imagery—a second center that is actually far more important to the document as a whole. If cell 42 is at the exact center of the grid, moving two cells up brings us to the exact center of the cloth—originally about 2.5 meters down from the top (or up from the bottom). Cell 29 is visually flagged in a number of ways (Fig 8.13; Fig 8.18b). First, to the left and the right are double-wide cells which, like the unusual composition of cell 42, stand out to the viewer from a distance. Cell 29 is visually framed, highlighted by a disruption in the ordered grid that surrounds it. The cell's importance is further underscored by its alphabetic label: we have returned to "Tlaxcallan." Remember that the scene at the top of the *Lienzo* presents a schematic map of Tlaxcala (Fig. 8.7), and that the scene in the very first cell is also labeled as taking place there (Fig. 8.8). Compositionally, the *Lienzo* presents Tlaxcala as both the starting-point of is narratives as well as the central pivot around which all other events radiate.

This central pivot indicates a key turning-point in the *Lienzo*'s narrative. The joint European–Tlaxcalan army has just returned after their first, failed attempt to conquer Tenochtitlan. In the center of cell 29, Cortés speaks with one of the four rulers of Tlaxcala, perhaps Xicontecatl (Fig. 8.13b and c). Floating above this pair, oddly, is a feathered battle standard (Fig. 8.13e). A radiating circle of green quetzal feathers bursts from a golden center. The intensity of the green and yellow inks used in the lithographed images means that this circle stands out visually from a distance; this may or may not have been true of the cloth document as well. Many different types of battle standards appear in the *Lienzo*, but this style only appears once, here. Behind and below Cortés stands Malinche (Fig. 8.13d); in this scene, as in many of her appearances in the *Lienzo*, she is translating. To the left of both Cortés and Malinche are Spanish soldiers on horseback. Behind the Tlaxcalan ruler is a building in which a European folding chair is placed, along with offerings of food.

Why is a feathered battle standard hanging in the air between Cortés and Xicontecatl? The details of this standard are very interesting. Bursting out from its golden circular
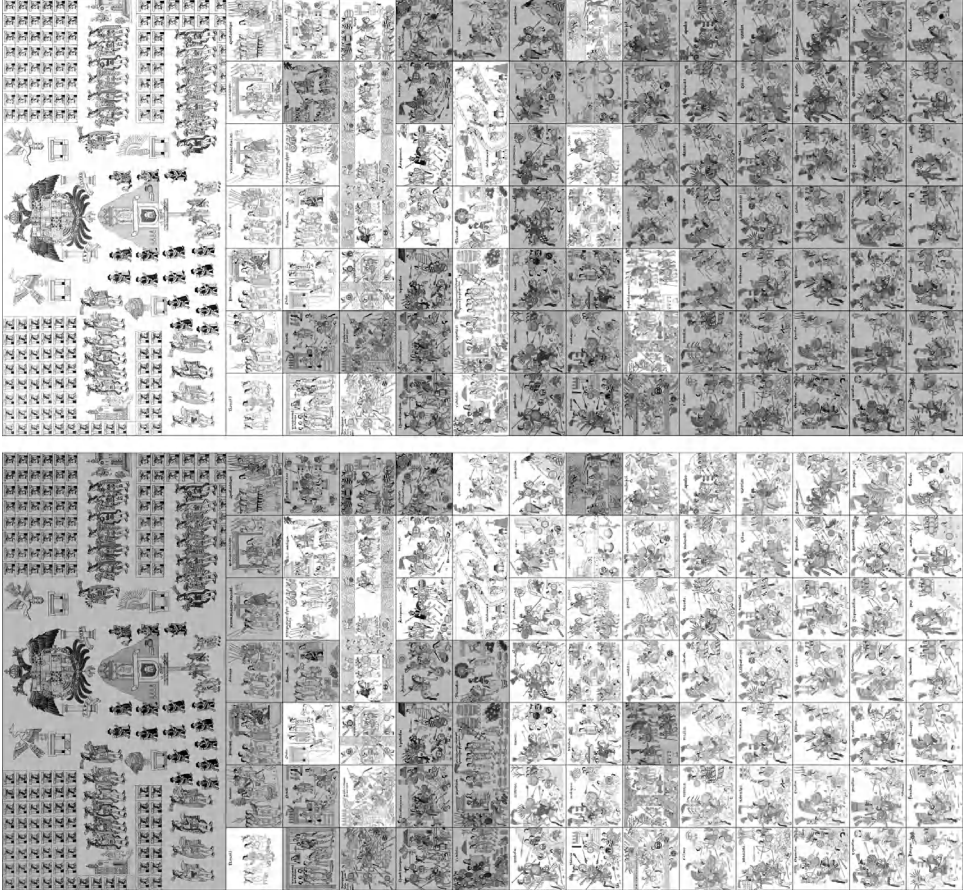
Figure 8.18 Macrocomposition in the *Lienzo de Tlaxcala*: scenes with Malinche (shaded on left) and scenes with Santiago (shaded on right).

center are not just green quetzal plumes, but also four V-shaped rays. These are sun-beams. This battle standard takes the form of a gilded, feathered sun. Cell 29 does not merely show a meeting between Xicontecatl and Cortes, with a costume element between them and Malinche off to the side. What Cell 29 shows is a golden sun rising into the sky above Cortés and Xicontecatl (and Malinche, off to the side). The depiction of a sun rising in Tlaxcala, at the exact center of the *Lienzo*, is no trivial detail. As we have seen in the *Codex Nuttall*, and as Davíd Carrasco discusses in detail, origins stories from throughout Mesoamerica described how sunrises brought about new ages of creation.[16] The dawn of a First Sunrise symbolized the dawn of a new social order—and, frequently, of a new political system as well. Remember that, in the *Codex Nuttall*, Lord 12 Wind is shown bringing temples to *Ñuu Ndecu* and *Ñuu Tnoo* on the final pages, visiting or founding two polities that would be very important by the time the Europeans arrived. A similar dawning-foundation association may be intended in this scene from the *Lienzo*. According to a 1562 Tlaxcalan account of their alliance with the Europeans (an account subsequently repeated with frequency), when Cortés retreated to safety in Tlaxcala after the first, failed attempt to conquer Tenochtitlan, he made the Tlaxcalans a number of promises about the elevated status they would have in the new colonial order (Gibson 1952: 159–160). What cell 29 probably shows, then, is the conversation in which Cortés offered these privileges to the Tlaxcalans. A New Sun dawns above the image of a Covenant being created between Tlaxcalans and Europeans, setting the foundation for Tlaxcala's privileged position in a new colonial order.

Breaking News on Malinche, or Gender Trouble

The fact that Malinche is drawn below these two men also relates in complex ways to the new age of creation this scene initiates. Up until this point, Malinche has repeatedly appeared on the same level, the same "footing" literally, as Cortés and the Tlaxcalan lords (cells 4, 5, and 7). Indeed, in cells 4 and 7 Malinche is actually drawn in front of Cortés: she, not her lover, is interacting directly with the Tlaxcalan nobility. What the composition of cell 29 does, then, is move Malinche to a subordinate visual position.

And just as the narrative on pages 14 to 22 of the *Codex Nuttall* replaces a female protagonist with a male protagonist, so too does the *Lienzo* tell a complicated tale of gender substitution. Cell 29 marks the beginning of Malinche's virtual disappearance from the *Lienzo*. Up until this cell, Malinche has appeared in 19 of the 28 scenes. In contrast, she appears in only 2 of the 58 scenes that follow (Fig. 8.18c, shading indicates cells where Malinche appears). Her virtual disappearance, it should be stressed, cannot be explained because the scenes that follow cell 29 focus on battles. Up until this central point, Malinche has appeared again and again as one of the faces in the crowds of European and Tlaxcalan warriors (Fig 8.16b). She even seems to direct the massacre in the plaza of Cholula (Fig. 8.10c; Peterson 1994: 193; McCafferty 2009: 186–188). Her disappearance cannot be attributed to "actual historical fact" either. We know from alphabetic accounts that Malinche was present at many of the events that are shown after cell 29 (such as accompanying Cortés on the second, successful assault against Tenochtitlan). The authors of the *Lienzo*, then, intentionally write Malinche out of Tlaxcala's history after the First Sunrise in the document's central image.

There are several ways to understand her disappearance. A number of prehispanic narratives from Mesoamerica—and from the Americas generally—involve primordial accounts of a female-dominated age replaced by a male-dominated age, or tell how a

male hero defeats a powerful female predecessor. We have seen this on pages 14 to 22 of the *Codex Nuttall*, and there are many structurally similar examples (Bamberger 1974; Carrasco 1987: 132–136; Pohl 1999: 183–184). The *Lienzo*'s gendered transition, then, may draw on prehispanic narrative roots.

But this change also relates in complex and contradictory ways to the new political order which dawns in cell 29. One of the hallmarks of the Spanish colonial regime was the predominance of men in official positions of political power—a masculine bias which had not been so extreme in prehispanic times (McCafferty and McCafferty 1988).[17] Malinche's disappearance after this scene may reflect this new reality. But, paradoxically, the Spanish legal regime seems to have initially *empowered* women in its courtrooms. After all, sixteenth-century Iberians were well accustomed to powerful women, as the reign of Queen Isabel of Castile makes clear. Susan Kellogg's studies of colonial documents from sixteenth-century Mexico City reveals how, through the 1580s at least, indigenous women are increasingly involved, and successful, in litigations over rights and property (Kellogg 1995: 104–5).[18] Delia Cosentino argues that a similar transformation may have been taking place at the same time in Tlaxcala. The city council minutes from April 29, 1555—the same minutes that probably record the commissioning of the *Lienzo* in 1552—describe plans to send a delegation to Mexico City to greet the Viceroy and to complain that lordly *teccalli* in Tlaxcala "are coming to ruin because of new prerogatives assumed by women" (Cosentino 2002: 238). A year later, the same minutes record a request for an inquiry as to whether a woman had ever been a ruler in Tlaxcala, or ever headed a lordly *teccalli* in the past. Both of these complaints, of course, were voiced by an all-male institution modeled on Spanish political forms. Twenty years later, Tlaxcalan historian Diego Muñoz Camargo suggests that female property ownership and control of *teccalli* were new, colonial phenomena. Given this context, the erasure of Malinche in the *Lienzo* may be an anxious attempt to assert the fundamental androcentrism of a new colonial regime.

The gendering of the *Lienzo* into a first half and a second half also relates in multiple ways to Federico Navarrete's observations on the role of Christian supernaturals in the document (2007). Although he was working with fragmented images (and so the compositional implications of his argument were unclear), Navarrete argues that the *Lienzo* incorporates the actions of two Christian supernaturals into its history. One was female: the Virgin Mary. Mary—Malinche in Nahuatl—took two forms in the *Lienzo*. First, she was Cortés' interpreter: Navarrete argues that the *Lienzo*'s representations of Malinche are based on European images of the Virgin Mary. Second, the Virgin appears as the mountain of La Malinche shown at the center of the top scene. The other supernatural was male: Santiago Matamoros (Moor-Slayer), transformed in the New World as Santiago Mataindios (Indian- Slayer). He is manifested, Navarrete argues, in the figure of a charging spear-wielding European knight, trampling severed body parts underfoot (Fig. 8.7, Fig. 8.14 top). These vignettes are clearly modeled on European religious imagery of Santiago.

What the recomposition of the *Lienzo* allows us to see is the profoundly spatial nature of Navarrete's observations. The first half of the *Lienzo* is dominated by scenes involving Malinche/María/Mountain, scenes that focus on dialogue and intercession. Malinche was a translator. The Virgin was and is an *abogada*, a lawyer in a universe of Divine Law who pleads with God on behalf of her human worshippers. And as we saw, indigenous women had power in colonial courtrooms that they did not have in colonial

political institutions (Fig. 8.18c). In contrast, the second half of the *Lienzo* is dominated by scenes involving Santiago as a charging conquistador, scenes that focus above all on warfare (Fig. 8.18d). The basic template of the "Santiago" scene is repeated 49 times in the second half of the *Lienzo*: a charging European on the left, Native Americans and their hill-based place signs on the right (as in Fig. 8.11a, Fig. 8.15c). Careful eyes can detect this visual rhythm when looking at the *Lienzo* from a distance. The compositional variety of the *Lienzo*'s scenes before cell 29 visually contrasts with the constant repetition of the battle scene template after cell 29, a repetition reinforced by the extensive use of gold and green in these images of battle. The differing appearances of Malinche and Santiago, then, further underscore the way cell 29 divides the *Lienzo* in into two gendered halves.

Conclusions

In this chapter, we hope to have introduced the reader to the dazzling traditions of pictorial writing from Mesoamerica. We also wanted to stress that these traditions did not end with the conquest of Tenochtitlan in 1521. Although our chapter was written for Part Two of this volume—"The Indigenous World *Before* the Europeans"—we wanted to use pictorial documents to talk about continuities and transformations in indigenous writing. The striking parallels in the macrocompositional structures of the prehispanic *Codex Nuttall* and colonial *Lienzo de Tlaxcala*—their focus on centrality, parallelism, and gendered transitions—underscore, in Cecelia Klein's words (2002: 131), "Why Pre-Columbianists Need to Be Colonialists and Vice-Versa."

In addition to thinking about the connections and disjunctures of prehispanic and colonial worlds, we also wanted to consider the different ways in which Mesoamerican pictorial documents can be viewed. On the one hand, we wanted to provide the reader with a basic introduction to the visual conventions of Postclassic writing. How are places represented? How are people named? How can you tell men from women? Glyph-by-glyph analysis is important, and there is much about these signs that we still do not understand. But moving with eyes fixed closely to the page, glyph-to-glyph, scene-to-scene, is deeply linked to Western assumptions about reading. We have argued that there was, for Mesoamericans, another way to look at documents, a particular style of ethno-reading. This distanced mode of viewing reveals information—often of fundamental importance—that is impossible to capture in narrow glyph-by-glyph readings. Very little work has been done on the macrovisual compositions of Mesoamerican texts (Hamann 2004, Seiferle-Valencia 2007). Further research is needed to understand how prevalent these macro-visual structures were, and how they shaped the meanings of the visual details embedded within them.

Notes

1 For more on the history and travels of the *Codex Nuttall*, see Byron Hamann, "The *Codex Nuttall*," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/tutorials/24>. October 2010.
2 See Davíd Carrasco on "The Story of Aztlan," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/lectures/15#jqTOC_link22>. October 2010.

3 See Barbara Tedlock "Day Keeping" and Anthony Aveni on "Astrology," *Mesolore*, Brown University, http://www.mesolore.net/classroom/scholars/33#jqTOC_link5> and <http://www.mesolore.net/classroom/lectures/17#jqTOC_link46>. October 2010.

4 See also John Monaghan on "Codices," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/scholars/37#jqTOC_link11>. October 2010.

5 Davíd Carrasco on "Sacred Time," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/lectures/15#jqTOC_link11>. October 2010.

6 See also John Pohl on "History or Divinity?" and Davíd Carrasco on "The Fifth Age," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/debates/64#jqTOC_link6> and <http://www.mesolore.net/classroom/lectures/15#jqTOC_link15>. October 2010.

7 An online version of the *Codex Selden* is included in *Mesolore*: <http://www.mesolore.net/archive/manuscripts/1/introduction>. October, 2010.

8 See also R. Douglas Cope on "Indian Resistance," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/debates/74#jqTOC_link18>. October 2010.

9 An online version of the *Lienzo de Tlaxcala* is included in *Mesolore*: <http://www.mesolore.net/archive/manuscripts/3/introduction>. October 2010.

10 See also Anthony Aveni on "Living Numbers," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/lectures/17#jqTOC_link8>. October 2010.

11 See Davíd Carrasco, "The Story of Xolotl," as well as Miguel León-Portilla, "Mesoamerica" and Ramón Arzápalo, "Translation," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/lectures/15#jqTOC_link6> and <http://www.mesolore.net/classroom/scholars/40#jqTOC_link5> and <http://www.mesolore.net/classroom/scholars/41#jqTOC_link5>. October 2010.

12 On the issues surrounding the selective retelling of history, see the debate on "History vs. Propaganda?," *Mesolore*, Brown University, http://www.mesolore.net/classroom/debates/30>. October 2010.

13 See John Pohl, "Mixtec History?," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/debates/64>. October 2010.

14 See also Alfredo López-Austin, "Fifty Percent Female?" and "The Politics of Gender," *Mesolore*, Brown University, http://www.mesolore.net/classroom/debates/49#jqTOC_link7 and <http://www.mesolore.net/classroom/debates/49#jqTOC_link10>. October 2010.

15 For other indigenous accounts of the "conquest," see also Miguel Léon-Portilla, "Mesoamerica," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/scholars/40#jqTOC_link5>. October 2010.

16 Davíd Carrasco on "Sacred Time," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/lectures/15#jqTOC_link11>. October 2010.

17 For general comments on the position of women in Aztec society, see Elizabeth Brumfiel on "Engendering the Past," Susan Kellogg on "Studying Women's (In)equality," and Alfredo López-Austin on "The Body: A Holistic View," *Mesolore*, Brown University, <http://www.mesolore.net/classroom/debates/44>,<http://www.mesolore.net/classroom/debates/48>, and <http://www.mesolore.net/classroom/debates/49>. October 2010.

18 See also Susan Kellogg, "The Aztecs: Patriarchal or Not?" and "War and Gender," *Mesolore*, Brown University, http://www.mesolore.net/classroom/debates/48#jqTOC_link6> and <http://www.mesolore.net/classroom/debates/48#jqTOC_link11>. October 2010.

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PART III

The Silver Heart of the Spanish Empire: Colonial Experiences

The Gods Return: Conquest and Conquest Society (1502–1610)

MATTHEW RESTALL AND ROBERT SCHWALLER

The first Mexican empire of the sixteenth century (the reign of Moctezuma II, 1502–20)

As the sun set on the Basin of Mexico, a procession of priests moved out of the ceremonial center of Tenochtitlán towards the city's eastern causeway. Once on the bank of Lake Texcoco, they walked up the Huixachtlán mountain to the temple at its summit, where they were visible from almost anywhere in the Basin. All fires in the Aztec Empire had been extinguished. As the Fire Drill constellation (Orion's Belt) became visible in the evening sky, priests removed the heart of a specially selected sacrificial victim and placed a fire drill in his chest cavity. First sparks, then a small flame, became the first fire of the new 52-year calendar round. A great bonfire was created, turning bundles of sticks into torches that were taken down into the city to light fires in the temples—beginning with the two great temples to the deities of war and rain, then to lesser temples, to private homes, and out to the temples, towns, and villages of the empire.

The New Fire Ceremony was performed, in one form or another, for at least a thousand years. The one described above took place in 1507, and would prove to be the last. It exemplified how the Mexica appropriated old traditions in the valley for the religious and political purposes of perpetuating their economic control over some 60 city-states across half a million square kilometers in central and southern Mexico—the entity we call the Aztec Empire. It also promoted the authority and legitimacy of Moctezuma Xocoyotzin (or Moctezuma II), who became emperor in his mid-thirties, in 1502. History has been unkind to Moctezuma, who was portrayed after his death as ineffective, hesitant, and cowardly when faced with the Spanish invasion. In fact, he was one of the empire's most dynamic and effective leaders, waging a series of successful campaigns to expand the empire south into what are now Oaxaca, Chiapas, and the Isthmus of Tehuantepec. Likely, were it not for the arrival of Europeans, Moctezuma would have initiated the Aztec penetration of the Maya kingdoms—and a 1559 New Fire Ceremony might have symbolized Aztec control over most of what is today Mexico and Guatemala.[1]

The 1559 ceremony was never held. Moctezuma's life and reign were cut short in 1520, when he was murdered by Spaniards in the heart of Tenochtitlán in the middle of the bloody two-year war of the Spanish invasion; as a final indignity, and symbol of the distortion of his memory that would last centuries, the Spaniards claimed that he was stoned to death by his own people.

The second Mexican empire of the sixteenth century
(the Spanish invasion, 1517–42)

The first Spanish–Aztec contact took place in April 1519, on the coast of the Gulf of Mexico. Envoys sent by Moctezuma exchanged gifts with the leaders of a Spanish expedition from Cuba, led by Hernando Cortés. The roots of the Spanish arrival in Moctezuma's domain lie in 1492 (the first trans-Atlantic voyage of Christopher Columbus, marking the European discovery of the Americas), in 1496–1515 (the decades of the Spanish conquest of the main islands of the Caribbean), and in 1517–18 (when two Spanish expeditions explored the coasts of Yucatán and Mexico, prompting Cuba's governor to authorize the Cortés expedition).

The invasion proper began in 1519. By September, the Spaniards had fought the city-state of Tlaxcala to a stalemate and forged an alliance against the Mexica (long-time enemies of the Tlaxcalans). In October, Cortés led the Spaniards into the first atrocity of the war, the massacre of the population of the city of Cholula (subject to the Aztecs); in November the Spaniards entered Tenochtitlán, in a diplomatic encounter later spun by Cortés as Moctezuma's formal surrender, although the Spaniards were virtually prisoners of the emperor in his capital city. Spanish–Mexica relations gradually deteriorated over the months that followed—with Cortés temporarily leaving the city to face a rival expedition from Cuba, a massacre of Mexica celebrants during a festival in the city center, and Moctezuma's violent death. In July 1520 the Spanish–Tlaxcalan force fought their way out of the city at night, a bloody retreat that cost most of the invaders their lives; the survivors took refuge in Tlaxcala, and then slowly built an anti-Mexica alliance among the city-states of central Mexico, culminating in the siege of Tenochtitlán, laid at the end of 1520. With tens of thousands of warriors on both sides, the long siege reduced the capital city to rubble, and the last emperor, Cuauhtémoc, surrendered to Cortés in August 1521.[2]

The sweep of epidemic disease, especially contagions such as smallpox, and the effects of more than two years of warfare, caused massive mortality across central Mexico. The decapitated empire of the Aztecs collapsed in 1521. But although the Spanish Conquest is traditionally dated to that year, Spanish control over the region was minimal. The captured prize of Tenochtitlán—which in 1519 was possibly the largest city in the world outside China, and certainly one of the most spectacular—was a disease-ridden ruin. Most of Mesoamerica's city-states remained intact, and some, such as Tlaxcala, were victorious. The long-term business of conquest, therefore, was just beginning in 1521; over the next two decades, it took three forms.

The first was to maintain the momentum of military expeditions. This was partially an extension of the momentum that had driven the Spaniards across the Caribbean and into Mexico, and partially an appropriation of the Aztecs own methods of expansion. Just as successive Aztec emperors had consolidated their rule and expanded their empires with campaigns along trade routes to major city-states, so did Spanish conquest expeditions do the same in the 1520s and 1530s—using Mexica and other Mesoamerican warriors,

sometimes the same men that had fought to expand the empire under Moctezuma. Even the Aztec invasion of Maya lands, only a possibility on the horizon in Moctezuma's day, became a reality in the 1520s; warriors from various central cities invaded highland Guatemala in campaigns led by the Alvarado brothers, and fought in Yucatán in campaigns led by the Montejos (the latter a protracted war of conquest that led to the founding of a small colony in 1542 and did not end until 1547). After 1542, most military activity took place in the north, but pockets of independent native polities were left in the south for centuries, especially in the Maya area.

Those who accompanied Cortés in 1519, as well as those who came to join subsequent conquest campaigns in the 1520s and 1530s, were overwhelmingly middle-ranking men, from occupations and backgrounds below the high nobility but above the commoner masses. Conquistadors were typically not career soldiers but rather professionals drawn from an array of trades, including tailors, farriers (horse-shoers), carpenters, trumpeters, coopers, stonemasons, barbers, merchants, and physicians. In some cases, the artisans and professionals invested in the company were confident enough of its outcome to bring their wives; Isabel Rodríguez, the wife of Sebastian Rodríguez, reportedly helped to treat the wounded while traveling with Cortés and his men in central Mexico. But in most cases, Spanish women remained with the merchants in the Caribbean—or even back in Spain.

Creating New Spain (1524–72)

The second and third forms of conquest consolidation were primarily peaceful and featured a greater variety of Spanish settlers, including women, friars and clergy, and administrators with little or no conquest experience. These were: the forging of the colonial regime (an administrative apparatus stretching from the viceroy in Mexico City down to the native councils that governed the towns and villages of New Spain); and the spiritual conquest (the varied and protracted efforts to convert the native population to Christianity and reduce them to obedient subjects of the Church and Crown).[3]

Following typical patterns of Spanish expansion, the leadership of the conquistador company became that of the newly conquered region. Cortés became governor and captain general of New Spain. For over six years, Cortés's position placed him at the apex of the nascent state; for four of those years Cuauhtémoc continued to rule the Mexica as a puppet-leader (until being accused of treason and hanged by Cortés while on campaign in Maya territory), but the Spaniards gradually took over the administration of the former empire of the Aztecs. In his capacity as governor, Cortés managed the distribution of native communities under the institution of *encomienda*—grants to Spanish conquistador-settlers of the labor and tribute from specific native towns.

Outside of Cortés's political authority was the municipal council—the *cabildo*—of Mexico City. Founded in 1524, the cabildo served as the only other major institution of Spanish government in New Spain. Following Iberian tradition, cabildo officers had wide latitude in managing the affairs of the city, including the distribution of house plots to individuals, arranging for the defense and security, and managing many aspects of the local economy. In the 1520s, the rubble of the former capital of Tenochtitlán was removed and used to build a small Spanish enclave in the center of the Basin of Mexico. The new city was built directly on top of the former palaces and temples of the Mexica. A small church was built facing the ruins of the pyramid-temples of the Mexica deities and government buildings were placed on top of the ruins of Moctezuma's

palace. New house sites were laid out in a grid radiating from that central area and the conquistadors lived within several central blocks. Causeways and aqueducts were repaired to provide access and water to the new Spanish city.

Within several years, Charles V decided to increase royal control over the region. Formally recognized as the Kingdom of New Spain, he extended the traditional bureaucratic institutions of Spanish government to the region in an attempt to curb the immense power of Cortés and the cabildo of Mexico City. In 1527, the king created the *audiencia* of Mexico; in the Spanish political system, the *audiencia* served as a high court of justice with legislative power in its jurisdiction. The two judges, or *oidores*, of the first *audiencia* arrived in 1528 (four were appointed but two died before taking their posts); they were ordered to curb abuses against the indigenous population as well as to oversee more closely the existing leadership of the city and kingdom. This resulted in Cortés being ordered to return to Spain, and an investigation, or *visita*, was conducted into his tenure as governor by the *audiencia*. The first *audiencia* was not particularly successful in remedying the problems of native abuse or imposing strong royal control over the conquistador-led society developing in Mexico City. In particular, the president of the court and new head of the royal government, Nuño Beltrán de Guzmán, used his post to engage in new conquests to the north rather than oversee royal affairs in Mexico City.

Following the failures of the first *audiencia*, in 1530 Charles V appointed a new president and *oidores*. Unlike the initial court, all members of the second *audiencia* had trained in law and had experience as magistrates before their appointment in New Spain. For five years, the second *audiencia* worked more effectively to prevent the abuse of native communities as well as to impose greater oversight onto the new society. They restricted the authority of encomienda holders (*encomenderos*) and appointed royal magistrates—*corregidores* and *alcaldes mayores*—to oversee the administration of local justice. The infrastructure of the colony was improved through the creation of a royal road (albeit unpaved and dangerous) between Mexico City and Veracruz, and the foundation of a new Spanish city, Puebla de los Angeles. Far more than their predecessors, the second *audiencia* members worked to transform the colony from a frontier conquest zone into a full-fledged kingdom of the Spanish monarchy.

In 1535, Charles V fully realized the creation of the kingdom's secular government with the appointment of a viceroy, who served as the king's direct representative in the colony and had sole executive authority over the kingdom's government. Ideally, the viceroy and the *audiencia* worked side-by-side, one as the judiciary, the other as executive. Nevertheless, both had some measure of legislative authority within their jurisdictions and could at times come into conflict over issues of governance. This system of checks and balances was imperfect, but it helped to reduce abuses of power by either the viceroy or the *oidores* of the high court. The first viceroy of Mexico, don Antonio de Mendoza, proved to be an excellent administrator and served for over fifteen years, the longest tenure ever of a Mexican viceroy. In conjunction with the high court, Mendoza imposed greater restrictions on conquest activities and the power of *encomenderos*. He also oversaw the foundation of the University of Mexico (the first in the Americas) and the creation of schools for elite indigenous children and *mestizos* (mixed-race offspring of Spaniards and Mesoamericans).

In his greatest accomplishment, he effectively implemented the New Laws during the 1540s. This series of royal orders sought to reduce the perpetuity of encomienda grants, extend royal control over native communities, and limit the enslavement and abuse of native groups. The expansive restrictions imposed by the legislation enflamed

encomenderos and conquistadors. Mendoza recognized the danger of the New Laws and worked to impose them gradually. In particular, he adopted the legal practice of *obedezco pero no lo cumplo* (I obey but do not comply). In this way, he recognized the validity and merit of the royal mandate, but noted that he could not implement the order fully. For example, he imposed limits on the inheritance of encomiendas, but frequently granted exceptions to appease powerful elite. On the other hand, when encomienda grants lapsed he did not renew them but worked to incorporate them under royal control. Finally, he severely regulated new conquests and insured the proper administration of justice among the crown's indigenous subjects. The pragmatism shown by Mendoza helped set a standard among viceroys; the best of his successors benefited from his ability to negotiate effectively between royal authority and the powerful colonial elite generated by the conquest.

The creation of a Spanish administrative pyramid would not have been possible without the preservation of indigenous self-rule at the municipal level. The base of that pyramid consisted of the community elders—overwhelmingly men—who had governed Mesoamerican towns and villages for many centuries. Such officials became members of the new native cabildos, some with Spanish titles such as alcalde and regidor, some retaining native titles of office. From the Spanish viewpoint, these were Spanish-style cabildos administering *pueblos de indios* or *repúblicas de indígenas*. From the native viewpoint, these were representatives of the same families that had for centuries governed the local community—the *altepetl* of the Nahuas, the *ñuu* of the Mixtecs, and the *cah* of the Yucatec Maya.[4]

Above the cabildo were two offices crucial both to local government and to the peaceful functioning of New Spain. These were the governor and the notary. Mesoamerican governors were sometimes called *gobernador* or *cacique* (an Arawak term the Spaniards had appropriated in the Caribbean), sometimes they retained native titles (such as *tlatoani* or *batab*); on occasion they were appointed by Spanish officials or elected by their peers, but often held the position for life. The notary—a relatively minor post in Spanish bureaucracy—was an important and prestigious position in Mesoamerican society. Alongside the cacique the local notary was the most important individual in most pueblos. They preserved last wills and testaments, recorded land sales, and wrote letters for the community. Together native governors and notaries were crucial actors in the administrative chain of the new kingdom; together they navigated their way through the dangerous political waters between their own native subjects and Spanish officials and settlers.

The structure of Spanish political control from the viceroy to the caciques fell into place relatively quickly as many indigenous groups recognized the strong continuities between the Spanish system and pre-Columbian traditions. In fact, within a surprisingly quick period of time, native communities began to celebrate their place within the new political order. In 1539, the viceroy and *audiencia* of Mexico City held a massive festival to honor Charles V's state visit to France. More than just a public display of royal grandeur, this pageant brought together Spaniards, Native Americans, and Africans in a massively symbolic portrayal of the colonial order. On the first day of pageantry, the main plaza of Mexico City was transformed into a forest and indigenous hunters dressed in traditional garb stalked and captured a multitude of local wildlife. Later in the day, a procession of over fifty Africans, probably both slave and free, dressed in fine bejeweled clothing, processed across the plaza led by their king and queen. After their entrance, the Africans skirmished with the Native Americans and joined the hunt. The next day saw an even grander display as the plaza was transformed into

the island of Rhodes and Hernando Cortés himself took center-stage battling against the tireless assault of an Ottoman army. Spaniards and Native Americans both played parts in the epic battle between Christians and their Turkish foes. Although contemporary observers might not have seen beyond the pageantry and opulence of the festival, the events unfolding in the plaza both recreated and reaffirmed the new colonial order. While the performance emphasized Christians over Turks, the pageantry and its use of Spanish, African, and Native American performers reinforced the history of reconquest and conquest which had given birth to New Spain.

The first several decades of Spanish rule also saw the creation of religious institutions. Many conquest expeditions contained clerics working to spread the Catholic faith among native groups. Nevertheless, no formal missionary activity began in the kingdom until 1524, when the Franciscan order sent twelve friars to begin preaching among the native population. These friars were quickly followed by missionaries from other mendicant orders, especially the Dominicans and the Augustinians. Just as the king sought to impose a hierarchy of political power, as patron of the Catholic Church in his dominions, Charles V quickly moved to appoint ecclesiastical ministers to the kingdom and, in 1528, named Juan de Zumarraga, a Franciscan friar, Bishop of Mexico and the head of the secular church in the kingdom. During the sixteenth century, mendicant orders dominated the early conversion and ministration of indigenous communities. Following the establishment of a diocese (later raised to the level of archdiocese), Zumarraga and his successors began to appoint secular priests to administer parishes in New Spain.

The bishop of Mexico had sole authority to investigate and prosecute religious crimes of any Christian subject of the kingdom during the first half century of the kingdom. This included both Spaniards and converted natives. Many clerics felt that the process of conversion among indigenous groups was occurring rapidly. Despite this optimism, the realities of conversion were not so clear. In June of 1539, Don Carlos Ometochtzin, a former student of the Franciscan *Colegio de Santa Cruz*, was accused of practicing idolatry, living as a bigamist, defaming the Christian faith, and plotting sedition against the Spanish government. Don Carlos' education with the Franciscans and his position as *tlatoani* of Texcoco made his apparent apostasy all the more shocking to Mexican cleric. Although his denunciation most likely came as a result of political rivalries among his fellow native nobles, Bishop Zumarraga's lengthy investigation uncovered indications that Don Carlos may have been continuing native traditions of plural marriage, keeping pre-Christian religious artifacts, and publically defaming new Spanish institutions of secular and religious authority. In late November, the inquisitors found Don Carlos guilty and handed him over to the viceroy to be executed. His death signaled major changes in the colony. For missionaries and clerics, it demonstrated how much more work was necessary in predicating the new faith; for Spanish authorities, it reminded them of the tenuous hold they held over native leaders; and, finally, for the natives of central Mexico, Don Carlos' execution reiterated the supremacy of the new Spanish king and the much diminished power of indigenous tlatoani.

The failures of conversion highlighted by the trial of Don Carlos led to a greater emphasis on understanding indigenous culture and religion. In particular, mendicant friars led by Fray Bernardino de Sahagún began to investigate indigenous beliefs in order to better predicate the new faith. A former teacher of Don Carlos, Sahagún began to collect and codify information concerning native religion to convert more accurately the native population. His efforts, along with those of other mendicants,

helped the clergy to understand better native languages and culture in their efforts to destroy the old religion and spread the new faith.

Sahagún's approach, however, lost traction among policymakers. His masterwork, known to us as *The Florentine Codex*, was sent to back to Spain. Philip II would eventually send the document to Florence as wedding gift for Francesco de Medici and Joanna of Austria, a cousin of the Spanish monarch. Meanwhile, another violent incident in the spiritual conquest further fired debate over conversion methods. A small group of Franciscans, eventually led by Diego de Landa, had worked during the 1550s to spread the new faith among the Maya of Yucatán; their methods had emphasized education and preaching over violence. But in 1562, Landa, disheartened by evidence of recidivism among the local elite, implemented an anti-idolatry campaign in which thousands of native men and women were arrested and tortured (several hundred died).

Landa was removed and sent to Spain to explain his actions. But although the concentrated religious violence of 1562 would not be repeated again in the colonial period, Landa was exonerated, promoted, and returned to Yucatán as bishop. The destruction of Maya religious statues and hieroglyphic books continued. The Franciscans could no longer wield the power of the Spanish Inquisition against native peoples, but two new arms of the Holy Office were created. The Mexican Inquisition was founded in 1572 as the primary body charged with the investigation and persecution of religious crimes throughout New Spain. Inquisitors could not investigate orthodoxy among native persons—reflecting lasting concerns that after half a century of spiritual conquest Christianity was still poorly understood by indigenous subjects—but bishops were still able to exercise inquisitorial authority over native communities. A separate body, the *Provisorato de Indios*, consisted of officials appointed by bishops to oversee indigenous predication and religious enforcement, and effectively functioned as an "Indian Inquisition."

The long conquest of the north (1540–1606)

Just as the Aztecs had failed to extend their empire into the north of Mexico, so did Spaniards have little success in the decades following the fall of Tenochtitlán. With the assistance of Otomí warriors, some near-north settlements were founded in the 1530s. But most northern native groups—whom the Spaniards, like the Aztecs before them, lumped together as barbarians called "Chichimecas"—were uncooperative. The Chichimecas were highly heterogeneous, independent, and semi-sedentary; they lived as much from hunting and gathering as from agriculture, and were not accustomed to the structured, sedentary lifestyle of Spaniards, Nahuas, Maya groups, and other Mesoamericans.

In 1540 an alliance of some Chichimecas fortified Mixtón and other mountain towns in the north. Although their "revolt" was crushed by Viceroy Antonio de Mendoza in the Mixtón War of 1541–42, native resistance to Spanish incursion in the north only intensified in subsequent decades. The Chichimeca War of 1550–1606 cost tens of thousands of lives. It was prompted by the Spanish discovery of silver—and the subsequent founding of mining settlements and then colonial towns—in the Zacatecas region in 1546. Further silver lodes were discovered in the 1550s and 1560s, and by the time San Luís Potosí was established in 1590, the north was the most lucrative region in New Spain.

After 1590 colonial officials and friars adopted a new policy, based on peace and trade, in a successful effort to reduce hostilities. This peace-by-purchase plan gradually brought

the long-drawn conquest of the north into the phase of peaceful colonial consolidation. With the 1595 invasion and subsequent founding of a troubled colony in New Mexico, the conquest frontier would shift into the far north.[5]

The colonial crucible (1519–1610)

From the outset, New Spain was a pluralistic society. In 1521, the vast bulk of the population was indigenous, divided among various ethnic and linguistic groups. Native Mesoamericans remained the majority through the sixteenth century (indeed, into the modern period), and the imposition of Spanish colonial rule was a protracted, incomplete process in much of New Spain. Yet the Spanish presence was permanent, and the steady social and economic integration of Spaniards and Mesoamericans meant that by the end of the century a return to the pre-Columbian past was impossible. At the same time, New Spain was not Spain; in social terms, it was new, unique, complex, multifaceted, and continually evolving.

This was partly because New Spain was forged not simply through the encounter of Spaniards and Mesoamericans; the third factor, too often ignored in the telling of Mexican history, consisted of a sizeable number of Africans—overwhelmingly black West Africans, both slave and free, who began arriving as early as 1519. In general, Spaniards and their African auxiliaries lived apart from native society. Nevertheless, from the conquest onward interethnic unions produced individuals of mixed ancestry typically labeled mestizos or *mulatos*: those born of Spaniards and native persons were termed 'mestizos', while individuals of African-European and African-indigenous unions were both categorized as 'mulatos'; both terms were used with increasing flexibility and according to regional variations. Towards the end of the century, a third term, *castizo*, developed in order to describe individuals born of unions between Spaniards and mestizos. Contemporary observers referred to the categories of difference, *español, indio, negro, mestizo*, and *mulato*, as *géneros de gente* ('types of people'). Later in the colonial period, the word *casta* (caste) was appropriated from the Portuguese experience in India as a term to describe the Spanish American categories of difference.[6]

The legal separation of communities in New Spain into *repúblicas* of natives and Spaniards, each with their own cabildos, did not include political space for Afro-Mexicans. But during the sixteenth century most communities in the kingdom, including pueblos de indios, came to have residents drawn from many of the géneros of colonial society. In particular, unions between elite indigenous families and conquistador-settlers led to the rise of mestizos as important figures in indigenous politics. The use of African slaves as intermediaries between encomenderos and indigenous communities facilitated the rapid growth of Afro-indigenous mulatos in many parts of New Spain. Urban areas were likewise highly pluralistic. Although most Spanish settlements were built around a Spanish-dominated center, Africans and native persons lived in many Spanish households as servants and slaves. Most labor, both urban and rural, was done by Africans, Afro-Mexicans, or native persons. This residential and occupational overlap facilitated continued interethnic mixing, through formal marriages between género groups as well as informal unions.

Throughout the century, royal law sought to more fully separate the géneros de gente by privileging Spaniards and imposing restrictions on non-Spanish persons. Both natives and individuals of African descent were required to pay tribute to the Spanish crown, and neither group was allowed to carry weapons, ride on horseback, or wear sumptuous

clothing—including silk or precious jewelry. Mestizos saw some limitations as well. They were not allowed to become encomenderos unless they were legitimate children of Spaniards nor were they allowed to hold many bureaucratic offices or become priests. Mestizos and *indios principales* (indigenous elites) were allowed to dress more sumptuously than other groups and could be given licenses to carry swords and ride on horseback. Moreover, all non-indigenous persons, including Spaniards, were barred from living in pueblos de indios. Although these restrictions were seen as a means of separating the diverse géneros de gente from each other, the legal restrictions were rarely enforceable. Patterns of settlement, employment, and individual mobility insured the persistence of interethnic unions that helped continue the growth of a heterogeneous society throughout the colonial period.

This chapter has an end date of 1610 not because the processes described above ended then; they were all ongoing—invasion and protracted conquest, gradual institutionalization of colonial rule, new Catholicisms forged by campaigns of religious conversion, social pluralism, and increased socio-racial complexity. We chose 1610 in order to use that year in the life of a Maya man in Spanish Yucatán as a symbol of the changes that had occurred during his lifetime.

Gaspar Antonio Chi was a Maya nobleman, born around 1530 in pre-colonial Yucatán. As a boy he witnessed the Spanish invasions, and was converted and educated by the first Franciscans in the peninsula. He later recalled nostalgically how prosperous and peaceful life had been before the invasions, and how years of war brought disease and discord; he saw much of it with his own eyes, including the violence of the summer of 1562, when he served as a translator and notary for the Franciscans. Such was his role for most of his adult life, working for the early bishops (such as Diego de Landa), acting as Interpreter General for the colonial administration, or serving as notary or as governor of a Maya town.

His last year was probably 1610. That spring, he stood by the font in the cathedral of the provincial capital to witness the christening of his great-grandson. The baby was given the name Gaspar Antonio, just as Chi had been given it as a young man, but his patronym was del Castillo; the baby's father was a Spaniard, and he was thus a mestizo of mixed conquistador and Maya noble ancestry. That same spring, Chi acted as interpreter and notary during the trial of a group of Maya men who had tried to depose and replace their town governor. This governor, a Maya noble and distant relative of Chi's, had been elected by the elders of the town but also had the support of the Spanish authorities; the coup attempt, carried out with violence, was deemed a rebellion and its leaders were executed.[7]

The long life of Gaspar Antonio Chi—like the trial of native elders that he helped record, and the christening of his mestizo great-grandson, both in his final spring—are full of the threads of change and continuity, syncretism and parallelism, that characterize greater Mexico's dramatic sixteenth-century history.

Notes

1 The scholarship on pre-conquest Mesoamerican history is drawn from a variety of primary sources, pre-colonial and colonial. Studies of such sources—both indigenous documents and Spanish documents based on indigenous informants—include Walden Browne's *Sahagún and the Transition to Modernity*, Carrasco and Sessions' *Cave, City, and Eagle's Nest: An Interpretive Journey through the Mapa de Cuauhtinchan No. 2*, Lori Diel's *The Tira de Tepechpan: Negotiating Place under Aztec and Spanish Rule*, James Lockhart's *We People Here: Nahuatl Accounts of the*

Conquest of Mexico, Matthew Restall's *Maya Conquistador*, and Susan Schroeder's *Chimalpahin and the Kingdoms of Chalco*.

2 This description is based on both Spanish and indigenous descriptions of the conquest process. For works which explore the complexity of the conquest period see: Florine Asselbergs' *Conquered Conquistadors: The Lienzo de Quauhquechollan: A Nahua Vision of the Conquest of Guatemala*, Serge Gruzinski's *The Conquest of Mexico: The Incorporation of Indian Societies into the Western World, 16th-18th Centuries*, Robert Haskett's *Visions of Paradise: Primordial Titles and Mesoamerican History in Cuernavaca*, Matthew and Oudjik's edited volume *Indian Conquistadors: Indigenous Allies in the Conquest of Mesoamerica*, Restall's *Seven Myths of the Spanish Conquest*, Camilla Townsend's *Malintzin's Choices: An Indian Woman in the Conquest of Mexico*, and Stephanie Wood's *Transcending Conquest: Nahua Views of Spanish Colonial Mexico*. For further historiographical discussion, see Restall's essay on "The New Conquest History" in the online journal, *History Compass*.

3 For scholarship on the political and religious development of the nascent kingdom, see: Pilar Arregui Zamorano's *La Audiencia de México Según los Visitadores (Siglos XVI y XVII)*, Louis Burkhart's *The Slippery Earth: Nahua-Christian Moral Dialogue in Sixteenth-Century Mexico*, Bernardo García Martínez's *El Marquesado del Valle: Tres Siglos de Régimen Señorial en Nueva España*, Susan Kellogg's *Law and the Transformation of Aztec Culture, 1500–1700*, Michael Riley's *Fernando Cortes and the Marquesado in Morelos, 1522–1547: A Case Study in the Socioeconomic Development of Sixteenth-Century Mexico*, Ethelia Ruiz Medrano's *Reshaping New Spain: Government and Private Interests in the Colonial Bureaucracy, 1531–1550*, and John F. Schwaller's *Origins of Church Wealth in Mexico: Ecclesiastical Revenues and Church Finances, 1523–1600*.

4 Much of the scholarship on indigenous local government comes from native language documentation produced by native communities themselves. For scholarship on indigenous community during the colonial period, see: Sarah Cline's *Colonial Culhuacan, 1580–1600: A Social History of an Aztec Town*, Haskett's *Indigenous Rulers: An Ethnohistory of Town Government in Colonial Cuernavaca*, Rebecca Horn's *Postconquest Coyoacan: Nahua-Spanish Relations in Central Mexico, 1519–1650*, Lockhart's *The Nahuas after the Conquest: A Social and Cultural History of the Indians of Central Mexico, Sixteenth through Eighteenth Centuries*, Michel Oudijk's *Historiography of the Bènizàa: The Postclassic and Early Colonial Periods (1000–1600 A.D.)*, Restall's *The Maya World: Yucatec Culture and Society, 1550–1850*, and Kevin Terraciano's *The Mixtecs of Colonial Oaxaca: Ñudzahui History, Sixteenth through Eighteenth Centuries*. These studies are all part of a larger school of scholarship that is usually called "The New Philology"; its Wikipedia article cites relevant essays by Lockhart and Restall.

5 The items in our bibliography that bear on the Spanish conquests in the north are Marc Simmons' *The Last Conquistador* and Susan Deeds' *Defiance and Deference*, as well as the essays by Ida Altman and Bret Blosser in Matthew and Oudijk's *Indian Conquistadors* volume.

6 For works that explore the complexity of colonial racial categories, see: Gonzalo Aguirre Beltrán's *La Población Negra de México: Estudio Etnohistórico*, Herman Bennett's *Africans in Colonial Mexico: Absolutism, Christianity, and Afro-Creole Consciousness, 1570–1640*, Patrick Carroll's *Blacks in Colonial Veracruz: Race, Ethnicity, and Regional Development*, John Chance's *Race and Class in Colonial Oaxaca*, Laura Lewis' *Hall of Mirrors: Power, Witchcraft, and Caste in Colonial Mexico*, María Elena Martínez's *Genealogical Fictions: Limpieza de Sangre, Religion, and Gender in Colonial Mexico*, Frank T. Proctor's *"Damned Notions of Liberty": Slavery, Culture, and Power in Colonial Mexico*, Restall's *The Black Middle: Africans, Mayas, and Spaniards in Colonial Yucatán*, Robert C. Schwaller's "Defining Difference in Early New Spain," Ben Vinson's *Bearing Arms for His Majesty: The Free-Colored Militia in Colonial Mexico*, and Nicole Von Germeten's *Black Blood Brothers: Confraternities and Social Mobility for Afro-Mexicans*. For a bibliographic essay on the topic, see Ben Vinson's contribution to *Oxford Bibliographies Online*.

7   Chi's life is explored in Inga Clendinnen's *Ambivalent Conquests*, Frances Karttunen's *Between Worlds*, and Matthew Restall's *Maya Conquistador*.

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The Kingdom of New Spain in the Seventeenth Century

Linda A. Curcio-Nagy

The seventeenth century (loosely defined as the 1580s to 1700) marked a pivotal but often neglected era in Mexican history. How unfortunate that such a seminal epoch has attracted less scholarship than the sixteenth and eighteenth centuries. The former era attracts profound scholarly interest due to the clash of cultures evident between Native Americans and Europeans. The latter, especially after 1750, merits intellectual inquiry for its relationship to the independence movements and the rise of Mexican nationalism. Scholarship on the seventeenth century has been focused on political and economic themes because it marked a time of institutional consolidation, dramatic economic booms and downturns, the nadir of the indigenous demographic decline, the large-scale introduction of African slave labor, and increased Spanish control. Yet, it was also a period of significant developments in cultural expressions and social life for colonial inhabitants. In some respects, the century gave rise to a unique colonial culture that served as the foundation for contemporary Mexican life. Fortunately, a new generation of historians of the seventeenth-century have increasingly emphasized the very social and cultural developments that so defined that era. For the purposes of this chapter, we will divide seventeenth-century scholarship into three categories of ongoing research that form the backbone of the field. Nonetheless, we should bear in mind that there are many historical issues, trends, and events that still await scholarly examination.

Political, Economic, and Institutional Change

From the 1580s to 1700, New Spain came into its own politically as a colony. Unable to manage such a far-flung empire, the Spanish Crown relinquished substantial control to local authorities who vowed to be loyal vassals and dedicated themselves to administering their own affairs. Noble viceroys, Audiencia judges, royal bureaucrats, municipal authorities, and high-ranking ecclesiastical officials worked in tandem to further the Spanish imperial project; but they were quick to protest any infraction against their authority or prerogatives from colleagues. They sometimes disagreed in public and

egregious ways that shattered civil harmony within the colony. Disputes regarding monies spent on official celebrations, to insults and law suits regarding position and honorary titles, sometimes consumed viceregal authorities (Curcio-Nagy 2004; Cañeque 2004). This led to severe breaches in Spanish unity, as in the case of the uprising in 1624 that deposed Marquis of Gelves which was led by prominent clergymen and local officials (Boyer 1982; Feijoo 1964; Stove 1970). Given the revolt against the viceroy in 1624, clearly the relationship between the Spanish ruling authorities and the Catholic Church hierarchy were not always harmonious. For example, Juan Palafox y Mendoza, named Royal Visitor, Archbishop, and later royal governor from 1640–49, alienated the Jesuits and many royal officials in his effort to alter established customs and reform both ecclesiastical and governmental traditions, to no avail (Brescia 2004; Alvarez de Toledo 2004). Nonetheless, the Spanish imperial system with all its jurisdictional confusion, rivalries, and flexibility was firmly entrenched and functioned smoothly enough for the metropolis as well as the viceroyalty.

Politics in Indian communities settled into certain patterns that would define the century. Even the smallest of towns had municipal governments. Corregidores and their tax collecting alguaciles were a conspicuous and dreaded presence in the countryside with their repartimiento de mercancías. Nevertheless, Native American leaders still retained control of village affairs, but increasingly saw their authority challenged or mitigated by Spanish and mestizos residents with whom they formed larger political and economic networks through marriage or compadrazgo (or god-parenthood relations). Indigenous governors incorporated Iberian traditions when necessary or expedient especially to retain traditional lands (Haskett 1991; Horn 1997). The decline in the Native American population due to European diseases such as smallpox continued unabated with an especially devastating epidemic during the 1570s (Gibson 1964). By 1650, the population had dropped to 1,000,000 individuals.

As a consequence of the Native American decline and protests regarding abuse, the encomienda system gave way to repartimiento service and a heavy tax burden. Eventually free wage labor for many indigenous people became the norm with the eventual abolition of repartimiento (the labor draft) in 1629. With the advent of free wage labor, some Spaniards attempted to force natives into a debt peonage system that was not particularly enforceable. This occurred at the same time as a dramatic increase in enslaved African labor. Nonetheless, labor scarcity developed that was not resolved by the combination of free, repartimiento or enslaved labor.

The shortfall of workers affected all aspects of the economy, especially agricultural production as Native Americans were the primary farmers during the period (Frank 1979). Even with the demographic disaster, Native Americans retained a goodly portion of their lands; but increasingly, as the eighteenth century approached and the indigenous population increased, land and water disputes would accelerate (Lipsett-Rivera 1999). Native Americans also had to contend with the impact of European livestock that roamed freely with open grazing and destroyed indigenous crops (Melville 1997). Although Spaniards attempted to acquire land and cultivate crops particularly for urban centers, their success was somewhat haphazard as turnover in ownership and bankruptcy were far too frequent to engender economic stability. Some estate and factory owners were able to adjust and utilize different forms of labor to expand or at least remain solvent (Barret 1970; Ewald 1976; Salvucci 1988). Even these apparent successes still had to endure numerous natural disasters, such as drought, with the resulting crop failure (Gibson 1964).

Even though increasing labor shortages and dislocations in the agricultural sector plagued the economy, as a whole it certainly benefitted from a tremendous increase in silver production from 1596 to 1620. This boom created not only new population centers, but also new business endeavors that catered to these boom towns (Bakewell 1971). Those colonists fortunate enough to profit from the silver boom invested in other business enterprises and donated substantial funds to New Spanish charities and pious foundations. Nevertheless, the silver boom did not overcome the dislocations present in the economy; and, once silver production declined, it exacerbated the existing problems.

The quest to understand the nature and causes of the economic decline of the seventeenth century dominated scholarship for many years. Woodrow Borah believed that the demographic disaster and resultant labor shortage affected silver mining, thus explaining what appears to have been an economic depression during the seventeenth century (Borah 1951).Chevalier demonstrated that a reduction in demand for products connected to the mining centers caused the haciendas to alter production to goods for personal consumption, affirming Borah's thesis (Chevalier 1966; Gibson 1964). Earl J. Hamilton and Pierre and Huguette Chaunu showed a marked decline in silver being sent to Spain. Species, sources of capital, and businesses dried up as the mainstay of the economy faltered (Hamilton 1965; Chaunu 1955–59).

More recent studies claim that there was no century-long depression in the mining industry, although total silver production did decline from 1641–50 and 1671–80, amounting to a decrease of 21 percent (Hoberman 1991). Even though trade with Spain contracted, regional trade and contraband with other European nations offset some of the decline. Some sectors of the economy suffered from stagnation as producers attempted to diversify and recoup their losses (Florescano and Gil Sanchez 1980; Schurz 1939; Tepaske 1982; Atwell 1982).[1] Overall, however, local growth continued and regional agriculture specialization came to define the latter part of the seventeenth century.

Given the economic vicissitudes, Spanish control of its very large viceroyalty was not always assured. Although no pan-indigenous rebellions developed, local revolts did shatter the colonial status quo and were inevitably responses to unscrupulous corregidores and resentment regarding onerous tax burdens. Such was the case with the great revolt of 1661 in Oaxaca, which was so severe in scope that it required troops from the capital city to quell it. Uprisings also rocked the northern frontier in Nueva Vizcaya (Schroeder 1998).

Nor did Spanish urban centers escape upheaval. Uprisings and disturbances took place in Mexico City in 1611, 1612, 1624, and 1697. Fear of civil unrest preoccupied Spanish officials and inhabitants from 1608–1612 and again in 1665, 1696, and 1701. King Yanga and his runaway slave followers sought to ensure their freedom and access to resources as they disrupted Spanish merchant routes for 30 years (Israel 1975; Guthrie 1945; Davidson 1966). More worrisome than these uprisings were those in which disgruntled Native Americans, individuals of mixed ancestry, and Afro-Mexicans joined together, as happened during the Great Corn Riot of 1692 in Mexico City (Cope 1994). These multi-ethnic insurrections appeared to confirm the worst fears of colonial officials, namely that the heterogeneous inhabitants would come together to overthrow the viceregal government. This led officials not only to institute coercive means of control but also to seek more persuasive means to encourage acceptance of Spanish rule. Large-scale spectacle was marshaled to influence the population to accept Spanish rule and to accept their own position in the ethno-hierarchy that was the caste system. This became a policy of festival statecraft (Curcio-Nagy 2004).[2]

During the same period, the Church as an institution, albeit not a monolithic one, expanded and consolidated its overall colonial mission. The sixteenth-century concerns regarding preferential treatment for peninsular-born clergy were eliminated with time; and, by the seventeenth century, most priests were criollos (Schwaller 1987). Larger towns had well established churches and clergymen to attend to the parishioners and collect the tithe. Church, especially cathedral, construction relied on Spanish designs, but native craftsmanship had subtle effects as new parishes and bishoprics came into existence. The seventeenth century also saw the foundation of a number of convents, expansion of houses for the sick, leprous, or mad, and schools, as well as the Pontifical University, all staffed by the religious.

Evangelization of the Native Americans continued as a major concern for the Church, especially in the frontier areas of the north; in some respects, the clergy, especially the regular orders, lost some of their missionary zeal. Nonetheless, many continued to view themselves as protectors of the Native Americans and sought to fortify their paternalistic position among an indigenous population in the midst of a demographic decline. For example, Bishop Juan Palafox y Mendoza wrote a moving treatise in defense of Native American rights (Palafox y Mendoza 2009). Some priests were outraged by the continuation of pre-Columbian practices and beliefs and they attempted to document the practices that they considered to be affronts to Christianity (Tavarez 2006). Both Jacinto de la Serna and Hernando Ruíz de Alarcón wrote works to describe the practices they had witnessed among their indigenous parishioners (de la Serna 1953; Ruíz de Alarcón 1988). They called for a concerted response on the part of the Church to eliminate such idolatry. Nonetheless their demands for an extirpation campaign went unanswered. Generally the mission of the clergy remained to minister to their diverse populations as well as was possible. Plans to secularize the missionary-controlled Indian settlements, called doctrinas, continued at an extremely slow pace, awaiting more thorough implementation during the following century. The secular clergy as a group appeared to be more concerned with their own financial and political wellbeing than the souls of their indigenous parishioners. Thus, they became the subject of law suits and complaints as Native Americans refused to endure these new abuses.

In 1571, the Holy Office of the Inquisition extended its jurisdiction to Mexico. Historians, most prominently among them Richard E. Greenleaf, have sought to understand the activity and impact of this ominous institution in New Spanish society. Native Americans were excluded from the Inquisition's purview, although not without some discussion (Greenleaf 1994). Generally, it was ineffectual because it lacked funding, because of the large expanse of its jurisdiction, and because of the fact that it could not investigate religious unorthodoxy among the aboriginal population, a group that constituted the majority of the population even with the demographic disaster. Although the Holy Office began a concerted effort to adjudicate religious crimes among Spaniards, Africans, and castas, its zeal waned after 1640. Martin Nesvig has pointed out that even at its most active, inquisitors were forced to reevaluate rules and concepts designed in Europe for a New World environment—this mitigated its impact (Nesvig 2009). Nevertheless, the Inquisition prosecuted a number of crimes, receiving denunciations from the general population. These included heresy, idolatry (among non-Native Americans), solicitation, magic, sexual transgressions, heretical tendencies, and minor religious crimes. Solange Alberro, in her monumental study of the Inquisition during this time, found that few crimes were formally investigated and even fewer received punishments (Alberro 1988).[3]

This cannot downplay the impact of the Holy Office on the lives of those accused, forced to spend time in the secret cells in the institution's headquarters, punished in public displays, or financially ruined though acquitted. Among those most severely prosecuted by the New Spanish Inquisition were Jewish groups resident in the capital who secretly continued to practice their religion. At the end of the sixteenth century and during 1640–1650, the Holy Office tried approximately 380 individuals accused of practicing Judaism, of whom 34–37 were burned at the stake. Scholarship regarding the so-called crypto-Jews has been extensive, focusing on general overviews of the number of individuals involved and the manner in which their religious practices came to light (Liebman 1975). Political and economic considerations also affected inquisitorial action especially during this decade in the seventeenth century because many of the accused were Portuguese and wealthy (Hordes 1982). Of those persecuted Luis Carvajal and his family have been studied in particular, because of their prominent role as a conquistador family and as members of the ruling elite (Liebman 1967; Cohen 1973). The unique practices of many of the accused have also become an important area of study as they appeared to assimilate many Catholic ideas and practices into their belief system (Uchmany 1995).

The auto de fes of the Holy in Mexico still await a detailed monograph. Nevertheless, the great auto de fe of 1649, in which many of the secretly practicing Jews were processed and punished before a large crowd, resulted in a major report that has been translated into English (Bocanegra 1974). During this auto de fe, through the use of symbols, placement of the prosecuted, and other elements of the ceremony, the Inquisitors sought to emphasize their position as representatives of Christ and to allude to the Final Judgment (Cañeque 1996).

Popular Religion, Societal Mores, and Ethnic Issues

A significant portion of the scholarship on colonial Mexico has been dedicated to the political, social, religious, and economic life of the Native Americans under Spanish rule. Those studies have primarily focused on the sixteenth century and the resilience of Native American culture and traditions. Nonetheless, scholars including those utilizing Native American sources have indicated that the seventeenth century was a period of increased hispanization. Native Americans, particularly after the mid-century, rapidly began to incorporate not only Spanish loan words into the indigenous vocabulary but also to integrate Spanish foods and material culture into their lives (Lockhart 1992; Restall 1997; Terraciano 2001). Native American cosmology increasingly saw the incorporation of Christian practices, ideas, and concepts of time and history into an evolving religious imaginary (Gruzinski 1993; Florescano 1994).[4] These hybrid concepts and practices affected the general population, not merely the aboriginal leadership who were already allied to Spaniards economically or politically and who were fluent in Spanish. The devotion to the saints as well as confraternity participation increased rapidly, as sources not only of religious expression but also as bastions of local control and pride (Megged 1996). As the century progressed, a unique, lively native Catholicism developed (Taylor 1996). Some Native Americans sought to escape Spanish hegemony and influence by retreating to barren or apparently uninhabitable areas, such as some Mayan inhabitants in the Yucatán peninsula (Fariss 1984). Others assimilated in such a fashion as to reconceptualize the Conquest, providing more Native American-centric interpretations of the event (Wood 2003; Haskett 2005). Still others, such as those resident in the capital, had

their ideas regarding kinship and gender rights dramatically altered to conform to Spanish models of patriarchal relations and a more nuclear family (Kellogg 1995).

Although ethnohistory has traditionally focused on the aboriginal population, the last decade has seen the publication of new works focused on the long neglected subject of the African experience in Mexico. Although Africans accompanied the Spanish conquerors, the years from 1580 to 1640 marked a dramatic increase in the forced arrival of Africans to Mexican shores. An estimated 200,000 Africans were brought to New Spain. Early studies introduced the basic outlines of Afro-Mexican contributions to viceregal society (Aguirre Beltrán 1946; Palmer 1976). The majority of Africans worked in urban areas, employed as domestic servants in Spanish households and shops, or in factories, or on farms. Nonetheless a significant percentage worked on sugar plantations on the Gulf Coast, where they experienced the harsh realities of cane cultivation and processing (Carroll 1991). Early studies identified the impressive rates of manumission for Afro-Mexicans and recent publications have sought to address this issue, pinpointing how Crown and Church prerogatives and legal codes facilitated manumission and did not always support the slave holder's property rights. These same studies point out the African ability to acculturate quickly to Spanish ideas about law and Christianity to manipulate viceregal institutions—such as the Inquisition during blasphemy trials—to ameliorate abuse, and even to procure freedom (Villa Flores 2006; Bennett 2003).[5]

The recent emphasis on African contributions to Mexican society has reinvigorated interest in the caste system, building upon the earlier works by Jonathan Israel and Magnus Mörner. Articulated early in the seventeenth century, the caste system came to full fruition as a concept in the eighteenth century. It ostensibly was a legal system in which individuals were categorized by their ancestry in an effort to organize ethnicity in such a fashion as to secure Spanish superiority. It was rooted in old Iberian ideas of limpieza de sangre that had originally been connected to religious ancestry; but it now was refashioned to emphasize ethnicity and racial mixture (Martinez 2008). In theory, individuals were bound by their caste designation assigned at birth (baptism), and consequently hindered by certain limitations regarding dress, occupation, and educational opportunities. Individuals were encouraged to marry within their caste; certainly Spaniards, whether criollo or peninsular, were to marry within their own group to maintain racial purity. Cumbersome and obsolete upon creation, the caste system in some respects sought to codify racial mixing and functioned in practice based on pigmentocracy, as ethnic mixing, whether through marriage or unsanctioned unions, quickly created a mestizo society in the broadest sense of the word. Historians have been increasingly interested not only in defining how the caste system functioned, but also in determining how individuals viewed their position or category in the system. New studies have sought to discover how individuals conceptualized themselves as a particular caste and whether the categories were more fluid than supposed and perhaps even useful. Douglas Cope has pointed out that caste designation did not organize an individual's life or chances for economic or social advancement, because the patronage system and relations with Spanish employers or godparents bypassed the pronounced limitations of the caste system in some instances (Cope 1992). In other cases, free blacks or mulattoes accepted and even affirmed their caste designation when it was to their advantage, for example, in the militia (Vinson 2001). Although Spaniards often utilized Afro-Mexicans as overseers and intermediaries between themselves and Native Americans, the relationship was not simply one of power or authority. The relationship between the three primary groups of the caste system was more fluid as original boundaries broke down through marriage,

working relationships, or the use of magic (Seed 1988; Lewis 2003; Restall 2005). New studies have also begun to consider the commonly ignored Asian population that, thanks to the Manila galleons, came to call Mexico home.[6] The new community of ethnicities that emerged in the seventeenth century was uniquely Mexican.

That shared community shaped a dynamic and vibrant popular culture or cultures that have fascinated historians of the seventeenth-century Mexico. Among the many facets of this emerging New Spanish culture, religiosity has been of particular interest and has constituted a sub-genre which some have coined the "new religious history." Although not exclusively based on Inquisition records, many of publications focused on religious history do form part of Inquisition studies. Inquisition cases afford a glimpse of not only the belief system that characterized the period but also a window into the lived experience of colonial Mexicans. These scholars are mindful that Inquisition cases represent unique circumstances in the coercive nature of the encounter between inquisitor and accused, and the manner in which individuals might have mediated their own testimonies must be taken into account. That being said, these studies have greatly expanded our knowledge of local religion and represent a fast growing approach in the field.[7]

One of the most salient characteristics of popular religiosity during the era was the devotion to the saints. Three edited volumes provide excellent examples of the current focus of religious history, especially as regards devotion to saints, confraternities, and miracles (among other aspects of popular piety). The authors of the essays in *Religion in New Spain* (Schroeder and Poole 2007), *Local Religion in Colonial Mexico* (Nesvig 2006), and *Manifestaciones religiosas en el mundo colonial americano* (Garcia Ayluardo and Ramos Medina 1997) illuminate religious practice and examine how inhabitants viewed the saints in unique ways.[8] In addition, local and royal governments were not opposed to demonstrating not only their piety but also their commitment to the wellbeing of their environment as they appropriated, sponsored, and championed certain miraculous images on behalf of themselves and their city (Curcio-Nagy 1996). One image, of course, requires more scholarly attention: The Virgin of Guadalupe. Stafford Poole definitively demonstrated that for the first one hundred years the Guadalupe was a decidedly Spanish devotion. It was not until the latter half of the seventeenth century that some members of the secular clergy and the Jesuits began to encourage actively the Native American devotion to the image. Native American adherence to Guadalupe became more widespread as the eighteenth century progressed (Poole 1995).[9]

Scholars have also examined the colonial efforts to canonize local saintly figures. Although such beatas and beatos rarely received the approval of the Vatican, the concerted effort on the part of local parishioners to promote these individuals, such as Felipe de Jesus or Catalina de San Juan—the China Poblana—attest to their devotion and reveal attempts to assert and strengthen local identity (Morgan 2002; Rubial García 1999; Myers 2003). Many beatas or saintly women dedicated themselves to God, but were too poor to enter a convent, so they sought to live sheltered contemplative lives. Many had no means of financial support, so they collected alms or sought to serve as healers for their neighbors, sometimes with disastrous results. Not all saintly figures merited public acclamation or sainthood. Nora Jaffary has pointed out that many "holy" persons fell afoul of the Holy Office for their innovative interpretations of doctrine and mystical practices. In such cases, the usually illiterate and uneducated beatas sought their own routes to the divine and served in some instances as intermediaries to the supernatural for their friends and acquaintances for financial recompense. They claimed to communicate with the souls of the dead to ease grieving relatives and to provide rituals

and potions to deal with frightening future events such as an impending birth. They served as a type of medical and spiritual adviser as they addressed the psychological, economic, and social problems of daily life in the seventeenth century (Jaffary 2004).

Many beatas, whether considered heretical or blessed, modeled their religious lives on those of the nuns housed in the numerous convents that dotted the urban landscape. The study of the lives and the literary contributions of female religious, as well as the socio-economic role of convents in colonial Mexico, has been an important subject for seventeenth-century scholars and in particular those interested in Novohispanic women's history. For those young women who desired a formal education, as well as for those who felt a calling to serve God, convent life provided a means to accomplish both tasks. In a monastery, many nuns also lived particularly comfortably because their families could afford the substantial dowries necessary for admission. Nonetheless, conventual life was plagued by rivalry and intrigue and was not sealed off from the politics and other profane influences of the world outside of the convent. Women religious did have a profound effect on local religiosity and the local economy as many convents sustained themselves through real estate and agricultural holdings (Lavrin 2008; Gunnarsdotter 2004; Holler 2003; Sampson Vera Tudela 2000). A few nuns gained renown as mystics and, with their confessors, wrote spiritual autobiographies that influenced the faithful and constituted a relatively popular literary genre during the period (Myers 1993; Arenal and Schlau 1989).

Although spiritual autobiographies and hagiographies could serve as models and inspiration to some, especially literate criollos and peninsulares, many people negotiated their way through a series of traditions and perceptions about Christianity as they sought to interact with Catholic teaching and practice. Joan Cameron Bristol and Nicole von Germeten make this point when examining Afro-Mexicans and their efforts to join confraternities and use magical remedies to assert their own agency and thereby resist Spanish control while becoming Christians (Cameron Bristol 2007; von Germeten 2006).

The use of magic was ubiquitous in society and consequently it constitutes a sizeable portion of the Inquisition record for New Spain. Magical practices ranged from love potions, to attempting to read the future in cards, astrology, and the casting of beans. Magic practitioners sought financial security, sexual partners and spouses, and physical attributes in order to improve their position in society or their well-being. A few claimed associations with the devil; but, by and large, pacts with Satan represented a tiny percentage of cases and show a demonstrative imitation of almost formulaic imaginings of the devil based on European lore. Fernando Cervantes demonstrates that these claims of devil worship were increasingly dismissed by the inquisitors as the flights of fancy of the overly superstitious and ignorant as the colonial period progressed (Cervantes 1994). Generally, scholars of the use of magic, such as Martha Few, have focused on female practitioners and clients and have questioned how such activities empowered them, offered these somewhat marginalized women financial resources, and provided a necessary social service and position in society (Few 2002).[10] Although seemingly pervasive in society, love magic, in particular, has been little studied.

Although love magic still awaits a detailed monograph, scholars have focused considerable attention to gender relations, marriage, and the concept of personal and familial honor.[11] Patricia Seed points out that in many cases, a man promised, not only his undying devotion, but also marriage, if a woman agreed to have sexual relations with him (Seed 2001). During the sixteenth and seventeenth centuries, in those cases in

which parents strongly opposed a union due to economic or racial differences, the Church consistently sided with the lovers who petitioned the ecclesiastical courts for marriage. Others simply ran away and consummated their unions, knowing that their parents would support the marriage in order to maintain familial honor. The Church firmly advocated the belief that free will played an essential role in marriage choice, overruling the more profane objections of parents (Seed 1988). Well into the eighteenth century the promise of marriage made as part of seduction was legally binding upon a man, particularly if witnesses were present to hear his pronouncements or if he left written evidence such as a note or letter. The woman's family would demand that he marry or pay some financial indemnity to compensate for her loss of honor. Even if marriage did not take place, his confirmed intention to marriage, no matter how insincere, could keep social stigma at bay for many years (Twinam 1999).

Other scholars have focused on the nature and challenges of marriage once contracted. Richard Boyer documents the failure of marriages due to abandonment and abuse that led some colonists to effectuate ad hoc divorces and marry again, only to be caught by the Holy Office. Other studies point out the changing ideas regarding affection and love and its role in marriage as well as changing power relations and ethnic identity (Earle 2005; Gutierrez 1991; Stern 1995). Scholars have pointed out how the Church utilized images of the Holy Family to depict and promote an idea of harmonious domestic life (Chorpenning 1996). The contributors to *The Faces of Honor* volume examine how the concept of honor was actually defined in practice by plebeians and slaves and connected to personal virtue, public reputation, and Christian practice (Johnson and Lipsett-Rivera 1998).

The interest in honor and marriage has also led scholars to investigate Novohispanic sexuality, a relatively new field. Pete Sigal examines sexual desire among the Yucatecan Maya and how issues of power and European concepts about sexuality would influence indigenous norms and assumptions (Sigal 2000).[12] Issues of masculinity and homosexual desire and Novohispanic taboos and prosecution of such acts have also come under study (Garza Carvajal 2003; Sigal 2003; Tortorici 2007). The nature of heterosexual norms and sexual desire has been the focus of a series of essays published in Mexico (Ortega 1986). The little examined history of prostitution has been brought to light by Ana María Adondo Rodríguez.

Pastimes, Intellectual Culture, and Artistic Life

The study of cultural life in colonial Mexico has historically been the purview of art historians and literary scholars, with the exception of Irving Leonard and his *Baroque Times in Old Mexico*. This has changed with the new emphasis on cultural history and interdisciplinary approaches and new studies have appeared that examine the rich lived experience of Novohispanic citizens.

Festivals, in particular, have received a significant amount of analysis (Curcio-Nagy 2004; Fe 1996; Caneque 2004; Ramos 2003; Lopes Don 1997; Viqueira Alban 1999; Harris 2000). Spaniards introduced large-scale European spectacle into the colony almost immediately after the Conquest. The Catholic liturgical calendar and the civil celebrations were crucial to the colonizing project as they served as media for modeling, presenting, teaching, and acting out political, social, and religious concepts in the new milieu. Beginning particularly in the 1580s, New Spain entered into a period of elaborate and costly religious and civil commemorations that fostered civic pride, cemented

political alliances, bolstered the elite, and feted the crowd. Festivals comprised both religious celebrations dedicated to saints and civil fiestas for authorities such as the viceroy; these occasions afforded inhabitants the regular opportunity to dance, make merry, and poke fun at friends, neighbors and the authorities. Mascaradas, parades with floats and costumed participants, were particularly impressive and creative, lauding as they did their sponsors—usually guildsmen or university students.

Music and dancing were essential to large-scale celebrations as well as general street culture. Robert M. Stevenson in his numerous publications laid the foundation for our understanding of the history of music in the colony. Recently, Maya Ramos Smith examined popular forms and stated that music and dance styles were heavily influenced by African rhythms from AfroMexicans as well as traditions from the Caribbean islands. Dances such as the sarabanda and the chacona were extremely popular and had the propensity to create scandal not only with suggestive lyrics but also provocative gestures such as lifting of a skirt, when added by the daring (Ramos Smith 1990). Villancicos, originally a type of Spanish Christmas song, were redefined during the seventeenth century and were composed to celebrate all manner of occasions and to express romantic love. Of course, the religious orders and cathedral chapters continued to compose and publish liturgical music for Mass and religious festivals, especially for Native American parishes. New works revisit and examine in depth the relationship between native evangelization and musical performance (Dutcher Mann 2010; Truitt 2010). Other studies focus on the musical ceremony and composition in the urban environment.[13]

In addition to music, no festival would have been complete without the corrida and poetry. Bullfights and contests on horseback were also an important part of most festivals and were popular means to demonstrate masculine stamina, dexterity, prowess, and grace before large crowds (Pérez y Fuentes 2002). Poetry—whether for formal contests hosted by the university, or ditties recited in taverns, or love sonnets designed to woo—was a prevalent part of popular culture (González 1998). Ephemeral architecture to celebrate the viceroy or the oath to the king would have been incomplete without poetic additions (Curcio-Nagy 2004). Satirical poetry not only traveled on paper from hand to hand, but showed up on palaces and government buildings (Greer Johnson 1993; Jimenez Rueda 1945). Unfortunately, scholars have only just begun to examine the role of satire in the seventeenth century.[14]

The most popular form of entertainment, that was also part of the celebrations such as Corpus Christi or the celebration of the Conquest, was the theatrical performance. Mexico City had its premiere playhouse, the Coliseo, that provided revenue for the Hospital Real de Indios; but smaller towns and villages could count on the regular arrival of itinerant acting troupes, jugglers, and acrobats. Inexpensive, sometimes poorly performed, inevitably a bit bawdy, theater productions horrified polite society and some officials who nonetheless were in attendance. The plays tended to emphasize cloak and dagger intrigue, swashbuckling, mistaken identities, and star-crossed lovers (Schilling 1958). Traditional society values were usually maintained and bolstered, which was just a well because censorship was piecemeal and half-hearted at best. Louise Burkhart points out that Native American towns continued to perform religious plays in Nahuatl which, under the not-so-watchful gaze of their priests, encouraged a hybrid form of Christianity (Burkhart 1996). According to Pedro Viqueira Albán, the most politically-charged commentary and satire in Mexico City required waiting for the puppet theater to commence after the regular theater closed for the night. These puppet shows were clearly not designed for children.

Formal intellectual life in the viceregal capital during the seventeenth century has long been a fruitful topic of study because it was the era of two of Mexico's eminent thinkers and writers: Sor Juana Ines de la Cruz and Carlos Siguenza y Góngora. The literature analyzing their writings is substantial.[15] Other literati who appear to have been well known and respected during the 1600s have not been the subject of historical study. A generation of scholars, contemporaries of Sor Juana and Siguenza y Góngora, has received essentially no attention. Individuals such as Matias Bocanegra, Manuel de Arguello, Gabriel Mendieta Rebollo, and Alonso Ramirez de Vargas published during the period and were active and prominent political and religious figures. In addition, a number of Native American intellectuals appeared, such as Domingo Francisco de San Antón Muñón Chimalpahin, who wrote the history of his native Chalco as well a diary of sorts of events of interest in the capital from a unique aboriginal perspective (Schroeder 1991; Chimalpahin Quauhtlehuantzin, 1997). In addition, Fernando de Alva Cortés Ixtlilxóchitl penned at least two histories of the Chichimec and the Toltecs respectively.[16]

Print culture during the seventeenth century expanded rapidly as more works were published during the era. Although the colony would still lack a newspaper, Siguenza y Góngora would publish a small newsprint pamphlet called *Mercurio Volante*. Several publishing houses, including those of Juan Ruiz, Bernardo Calderon, and Diego Carrido, jockeyed for position by seeking the government commissions for important works such as religious texts destined for parishes throughout the colony. The publishing houses printed religious tracts, festival descriptions, particularly impressive sermons, dictionaries, medical treatises, musical scores, and navigational accounts. Wealthy individuals or convents and schools had substantial libraries. Unfortunately, the poor but literate inhabitants and those who were illiterate did not benefit from the book trade. A long neglected area of research, the publishing industry has attracted new scholarly attention with the works of Ernesto de la Torre Villar, Hortensia Calvo, and Magdalena Chocano Mena. These authors are particularly interested in how print culture affected the intellectual formation of the colony, and point to the increase in publication of Spanish secular texts at the expense of religious materials in indigenous and Spanish languages.

Architecture during the seventeenth century developed beyond the austere and heavy styles of the 1500s. Architectural designs for large and important buildings such as cathedrals were still based on European models and architects (Toussaint 1967). A unique local building style quickly came into existence that would characterize colonial Mexican architecture for years to come. This baroque style consisted of a mélange of architectonic elements, indigenous influences—particularly in the carved sculpturing fixtures affixed to columns and walls, use of bold colors, and gold gilding, all presented in riotous detail. The use of local materials such as yellow limestone, red tezontle, and green stone also contributed to the design and added to the innovative look of Novohispanic churches (Bailey 2005). Broad courtyards, established during the sixteenth century to accommodate large numbers of indigenous neophytes, still remained a characteristic of many churches (McAndrews 1965). Mexican painters such as Juan Correa, Juan Juárez, and Cristobal Villalpando, rather than newly arrived Spanish artists, saw their works displayed in churches and their stature in society increase.[17]

Residential architecture followed religious building design to a certain extent but began to emphasize the use of rod iron railings on balconies and the use of polychrome tiles, especially from Puebla de Los Angeles where the exterior and interior use of talavera in home decoration became synonymous with the city. Home decoration for the elite

and middle sectors of society incorporated Spanish designs, items based on Asian models such as chests with lacquer and mother-of-pearl inlay, and local styles.[18] Biombos, painted folding screens, also became fashionable and depicted pastoral scenes (reminiscent of the New World's first recreational area, Alameda Park in Mexico City) and historical events such as the Conquest.[19]

The seventeenth century was an era of continuity and change in all areas of lived experience. Those scholars who have researched and analyzed different aspects of the social, economic, political, religious, and artistic development of the colony have greatly advanced our understanding of life in the 1600s. Rather than viewing the seventeenth century as a long period of stagnation between two epochs of rapid change, scholars have demonstrated that it should be viewed as a time of innovative cultural production as African, Native, Spanish, and Asian peoples, institutions, traditions, and artistic influences merged to create a new identifiably Mexican culture.

Notes

1   For the outline of the debate on the depression, see John H. Tepaske and Herbert S. Klein, "Seventeenth Century Crisis in the Spanish Empire: Myth or Reality?" *Past and Present* 90 (February 1981): 116–35. For a recent review of the seventeenth-century decline and the literature on the period, see the introduction to Hoberman, *Mexico's Merchant Elite*, chapter 1. A new subfield is now focused on the economic impact of the Manila-Mexico trade. See for example, Dennis Flynn, Arturo Girladez, James Sobrido, and James Sobredo, eds., *European Entry into the Pacific: Spain and the Acapulco-Manila Galleons* (Aldershot: Ashgate, 2001).

2   For an examination of how architecture was utilized to emphasize Spanish authority and power, see Francisco José Santos Zertuche, *Señorío, dinero y arquitectura: el Palacio de la Inquisición de México, 1571–1820* (Mexico: Colegio de México, 2000) and Michael J. Schreffler, *The Art of Allegiance: Visual Culture and Imperial Power in Baroque New Spain* (University Park, PA: Pennsylvania State University, 2007).

3   The dean of Mexican Inquisition studies is Richard Greenleaf, who studied the Holy Office during its formative years in the sixteenth century. See his *Zumárraga and the Mexican Inquisition, 1536–1543* and *The Mexican Inquisition of the Sixteenth Century*. Stafford Poole produced an excellent analysis of Holy Office's first inquisitor in *Pedro Moya de Contreras: Catholic Reform and Royal Power in New Spain, 1571–1591*. For an overview of the scholarship before 1992, see Greenleaf's "Historiography of the Mexican Inquisition: Evolution of Interpretations and Methodologies," in *Cultural Encounters: the Impact of the Inquisition in Spain and the New World*, edited by Mary Elizabeth Perry and Anne J. Cruz (Berkeley:University of California Press, 1992), 248–276. The recent focus of inquisition studies, with the fine exception of the study by Martin Nesvig, focuses on analyzing inquisition documents to further our understanding of popular religiosity. These studies are referenced later in this chapter.

4   For discussions of hybridity, see Viviana Balsera Diaz, "A Judeo-Christian Tlaloc or a Nahua Yahweh?: Domination, Hybridity, and Continuity in the Nahua Evangelization Theater," *CLAR* 10 (2001): 209–228; Carolyn Dean and Dana Libsohn, "Hybridity and its discontents: Considering Visual Culture in Colonial Spanish America," *CLAR* 12 (2003): 5–35; Susan Kellogg, "Depicting Mestizaje: Gendered Images of Ethnorace in Colonial Mexican Texts," *Journal of Women's History* 12 (3) (2000): 69–92; Louise Burkhart, *Holy Wednesday: A Nahua Drama from Early Colonial Mexico* (Philadelphia: University of Pennsylvania Press, 1996); and Serge Gruzinski, *The Mestizo Mind. The Intellectual Dynamics of Colonization and Globalization* (New York: Routledge, 2002).

5   For the latest research in the field of Afro-Mexican studies, see the collection of essays in Benjamin Vinson III and Matthew Restall, eds., *Black Mexico: Race and Society from Colonial to Modern Times* (Albuquerque: University of New Mexico Press, 2009).

6   As part of the new focus on ethnicity in seventeenth history, scholars have also begun to focus attention on Filipino residents who migrated to New Spain. See for example, Floro L. Mercene, *Manila Men in the New World: Filipino Migration to the Americas from the sixteenth century* (Quezon City: University of the Philippines Press, 2007). For an analysis of the impact of Asian material culture and peoples on Mexican society, see Donna Pierce and Ronald Osaka, *Asia and Spanish America: Trans-Pacific Artistic and Cultural Exchange 1500–1850: Papers from the 2006 Mayer Center Symposium at the Denver Art Museum* (Denver: Denver Art Museum, 2009).

7   For examples of Inquisition studies that add to the social and cultural history of the colony, see Solange Alberro, *Del Gachupín al criollo o de cómo los españoles de México dejaron de serlo (*Mexico: El Colegio de México, 1992); Noemí Quezada, Martha Eugenio Rodríguez, and Marcelo Suarez, eds., *Inquisición novohispana*. 2 vols. (Mexico: UNAM, 2000); Richard Boyer, *Lives of the Bigamists: Marriage, Family, and Community in Colonial Mexico* (Albuquerque: University of New Mexico Press, 1995); Javier Villa Flores, *Dangerous Speech. A Social History of Blasphemy in Colonial Mexico* (Tucson: University of Arizona Press, 2006); Maria Cristina Sacristán, *Locura e Inquisición en Nueva España, 1571–1760* (Mexico: Fondo de Cultura Económica, 1992); Perry and Cruz, *Cultural Encounters*; and, Giles, *Women in the Inquisition*.

8   Other collected volumes include Nicholas Griffiths and Fernando Cervantes, eds., *Spiritual Encounters: Interactions between Christianity and Native Religions in Colonial America* (Lincoln: University of Nebraska Press, 1999) and Allan Greer and Jodi Bilinkoff, eds., *Colonial Saints: Discovering the Holy in the Americas 1500–1800* (New York: Routledge, 2003). For an innovative approach that examines devotion to one particular miraculous image from the colonial period to the present, see Jennifer Scheper Hughes, *Biography of a Mexican Crucifix: Lived Religion and Local Faith from the Conquest to the Present* (New York: Oxford University Press, 2009).

9   Also see David A. Brading, *Mexican Phoenix: Our Lady of Guadalupe. Image and Tradition, 1531–2000* (New York: Cambridge University Press, 2001) and Louise M. Burkhart, *Before Guadalupe: the Virgin Mary in Early Colonial Nahuatl Literature* (Albany: Institute for Mesoamerican Studies, University of Albany; distributed by University of Texas Press, 2001).

10 Studies on witchcraft in the seventeenth century include Alejandra Cárdenas, *Hechicería, saber y transgresión: Afromestizas ante la inquisición (Acapulco 1621–1622)* (Chilpancingo, Mexico: Imp. "Candy", 1997); Ruth Behar, "Sex and Sin, Witchcraft and the Devil in Late-Colonial Mexico," *American Ethnologist* 14, no. 1 (Feb. 1987): 34–54; Martha Few, *Women Who Live Evil Lives. Gender, Religion, and the Politics of Power in Colonial Guatemala* (Austin: University of Texas Press, 2002); Laura Lewis, *Hall of Mirrors. Power, Witchcraft, and Caste in Colonial Mexico* (Durham: Duke University Press, 2003); Noemí Quezada, *Amor y magia amorosa entre los Aztecas* (México: UNAM, 1989); Fernando Cervantes, *The Devil in the New World: The Impact of Diabolism in New Spain* (New Haven: Yale University Press, 1994); and, Mary Giles, ed., *Women in the Inquisition. Spain and the New World* (Baltimore: Johns Hopkins University Press, 1999).

11 For examples, see the Seminario de Historia de las Mentalidades, *Amor y Desamor. Vivencias de parejas en la sociedad novohispana* (Mexico: Colección Divulgación, 1999); Asunción Lavrin, ed., *Sexuality and Marriage in Colonial Latin America* (Lincoln: University of Nebraska Press, 1989); and Steve J. Stern, *The Secret History of Gender: Women, Men and Power in Late Colonial Mexico* (Chapel Hill: University of North Carolina Press, 1995).

12 John Chuchiak in "The Sins of the Fathers: Franciscan Friars, Parish Priests and the Sexual Conquest of the Yucatec Maya, 1545–1808," *Ethnohistory* 54, no. 1 (Winter 2007): 69–127 also discusses Mayan sexuality and power relations with Spaniards. Also see Lee Penyak, "Criminal Sexuality in Central Mexico, 1750–1850," Ph.D. diss., University of Connecticut,

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13   Also see Tess Knighton and Alvara Torrente, eds., *Devotional Music in the Iberian World 1450–1800* (London: Ashgate, 2007); Geoffrey Baker and Tess Knighton, eds., *Music and Urban Society in Colonial Latin America* (New York: Cambridge University Press, 2010); and, Mark Pedelty, *Musical Rituals in Mexico City: From the Aztecs to NAFTA* (Austin: University of Texas Press, 2004).

14   For works on the eighteenth-century satire see José Miranda and Pablo González Casanova, *Sátira anónima del Siglo XVIII* (Mexico: Fondo de Cultura Económica, 1953) and George Baudot and María Agueda Méndez, eds., *Amores prohibidos. La palabra condenada en el México de los virreyes: antología de coplas y versos conservados por la Inquisición de México* (Mexico: Siglo Ventiuno, 1997).

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   For a discussion of academic and cultural life, see John Tate Lanning, *Academic Culture in the Spanish Colonies* (New York: Oxford University Press, 1940).

16   See his *Historia de la nación chichimeca* (Madrid: *Historia* 16, 1985).

17   Arturo Soberón, *Cristóbal de Villalpando: el pincel bien temperado* (Mexico: Consejo Nacional para la Cultura, 1997); Donna Pierce, et. al., eds., *Painting a New World: Mexican Art and Life 1521–1821* (Denver: Denver Art Museum, 2004); María Ester Ciancas and Barbara Meyer, *La pintura de retrato colonial, siglos XVI–XVIII* (Mexico: Instituto Nacional de Antropología, 1994); Maria Elisa Velázquez Gutíerrez, *Juan Correa: "mulato libre, maestro de pintor"* (Mexico: Consejo Nacional para la Cultura y las Artes, 1998); and Emily Umberger and Tom Cummins, eds., *Native Artists and Patrons in Colonial Latin America* (Tempe, AZ: Arizona State University, 1995).

18   For examples, see *The Grandeur of Viceregal Mexico: Treasures from the Museo Franz Mayer* [The Museum of Fine Arts, Houston and the Museo Franz Mayer, Mexico] (Milan: Amilcare Pizzi, 2002); *The Arts in Latin America 1492–1820* (Philadelphia: Philadelphia Museum of Art, 2006); and Robert J. Mullen, *Architecture and its Sculpture in Viceregal Mexico* (Austin: University of Texas Press, 1997).

19   For an introduction to this unique art form, see *Viento detenido. Mitologías e historias en el arte del biombo. Biombos de los siglos XVII al XIX en la Colección Soumaya* (Mexico: Museo Soumaya, 1999).

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CHAPTER ELEVEN

The Enlightened Colony

SUSAN M. DEEDS

When college teachers of Mexican history introduce the transition from Hapsburg to Bourbon rule in the early 18th century, they frequently offer a droll disclaimer to explain that they are referring to the dynastic family and not the distilled alcohol. In spite of the flippancy that this suggests, teaching about the 18th century requires navigating a series of scholarly debates that can be sorted into three main categories: The first involves periodization itself because, although we can put a time line on the period of Bourbon rule—which spanned the 18th century beginning in 1701 with Philip V—no changes occurred in that year to mark a clear break from the Hapsburg period, and no single set of policies distinguished Bourbon rule in Mexico. The second debate has to do with the nature and the effects of the Bourbon "reforms." Some scholars charge that the designation itself is misleading since Bourbon policies did not produce profound economic or political changes. A third discussion revolves around the issue of social control and the extent of state power to regulate the behavior of New Spain's inhabitants. Under this grouping we could also place the relationship between church and state and the evolving intersections of race, class, and gender in the *casta* system.

All these issues have generated questions about what actually transpired in 18th-century New Spain. When did the Bourbon 18th century begin? If reforms did occur, what was their nature and whom were they designed to benefit? To what degree were reformist tendencies related to changes taking place in northern Europe? To what extent did the Bourbons succeed in their plan to modernize society, curbing the temporal authority of the Catholic Church, and imposing order and hierarchy on a popular culture deemed to be undisciplined and backward-looking? Finally, did Bourbon policies provoke resistance and how were they linked to Mexican independence from Spain in 1821?

Many scholars who claim to study the 18th century actually cover only the period of the reign of Charles III (1759–1788), when Spain more energetically aimed to transform its most prosperous colony through the so-called Bourbon reforms. For these historians, the first half or first third of the 18th century has more in common with the 17th century. Another tack has been to look at the period from mid-18th to mid-19th century

as a unit that encompasses late Bourbon and early republican policies. Scholarly disagreement still persists around these questions, but most agree that the transition from Hapsburg to Bourbon rule in the early 18th century brought few immediate changes to Mexico. Nor did Charles III's attempts to reform the political and economic structures of the Spanish empire after the 1750s much alter the basic contours of the economy or the political culture. At the same time, the 18th century did witness changes in economic, demographic, social, and cultural terms.[1]

We know that Hapsburg rule during most of the 17th century was characterized by [1] local elite control of limited markets in an agrarian economy that did not yet uniformly conform to the capitalist mode of production; [2] a decline in silver remittances to the metropolis; and [3] forms of social control flexible enough to keep Indians, blacks, and mixed groups in their places. Paradoxically, some have noted that the hesitant nature of some economic activities in the non-Indian sectors left the Indian laboring population in relative peace, especially in southern New Spain. As a result some native communities attempted to reconstitute village politics, culture, and create hybrid forms of local Catholicisms (Farriss 1984, Carmagnani 1988, Zeitlin 2005).[2] Ranged against this backdrop, we might see the period from 1680 to 1730 as a transitional phase that encompassed and planted some seeds for change. The Indian demographic recovery that began in the mid-17th century (even earlier in some regions) continued into the 18th, prefiguring overall population growth in the last half of the century. Although the indigenous population taken as a whole grew throughout the century, epidemics and subsistence crises affected regions differently (Garner 1993). In some cases Indian villages were decimated and mestizo communities took their places (Brading 1978, MacLeod 1986, Deeds 2003).

The transition period in the late 17th and early 18th centuries also witnessed economic shifts. Spain, faced with increasing challenges from the Atlantic expansion of its northern European neighbors, sought solutions to expand trade benefits for the metropolis, first by increasing the number of ports and ships that could legally engage in commerce, and eliminating the almost obsolete fleet system. Meanwhile other developments had signaled portents for the future: elites in Mexico stepped up labor exploitation as they looked for new export products, and the silver mining sector began to bounce back after 1670 (Bakewell 1984, MacLeod 1984). Spain itself began to experience an economic and possibly demographic revival in the 1670s, with increases in shipbuilding, agricultural production, and commerce.[3] This revival positively impacted transatlantic commerce, only to be handicapped anew by the War of Spanish Succession (1700–1713). The Duque de Alburquerque, appointed by the Bourbon king to placate the losing faction of Hapsburg supporters, served as New Spain's viceroy during this decade, and his policies did not displace the networks of patronage and clientelism already in place in the colony (Rosenmüller 2008).

Nonetheless, a cadre of Spanish bureaucrat-intellectuals who advised the Bourbons had it in mind to capitalize on the 17th-century portents that signaled productive changes. Would they be influenced by currents of "enlightened" thought emanating from northern Europe, especially from their ties with the French Bourbons, directed toward the formation of a true bourgeoisie that would become the backbone of industrial capitalist development and limit monarchical power? Would they move to restrict the considerable temporal authority and wealth of the Catholic Church? The short answer finds that the privileged sectors of Spanish society vigorously resisted the would-be reformers who proposed a Spanish version of liberalized trade and economic growth,

thus blunting the reform efforts attempting to extract more wealth from New Spain by stimulating mining production, creating a loyal but efficient bureaucracy to collect taxes, and appropriating a share of the Church's immense assets in money and rural and urban properties.

At the same time, the reform efforts experienced considerable success in exporting New Spain's capital, above all silver, to the metropolis, especially after the late 1770s, thus draining the colony of coinage, and causing difficulties, if not disruptions, in local exchanges (Garner 1990). This somewhat counterproductive success was limited by persistent mercantilist structures in trade and manufacture zealously defended by the "old guard" of monopoly merchants in Cádiz and Mexico City so closely linked to the silver mining economy. Determined to maintain exclusive control, this privileged sector undermined reforms designed to free the Spanish empire from dependence on foreign merchants, bankers, and manufacturers. As Stanley and Barbara Stein stated so aptly, in the end the Bourbon policymakers "could at best initiate cosmetic change when more radical change was made imperative by the rapidly developing English and French economies of the time" (Stein and Stein 2003: 351). The so-called Esquilache Riots in Spain in 1766, instigated by the "old" aristocracy and the merchant guilds against the reform efforts of Charles III's minister, the Marquis de Esquilache, and during which the king fled Madrid, signaled an end to any serious systemic reforms.

On the political front, the Bourbons attempted to exert greater control over New Spain. In 1762 the Spanish crown created a professional standing army in Mexico and moved to strengthen local militias (McAllister 1967, Archer 1977). In 1776 Minister of the Indies, José de Gálvez, established a new command structure for New Spain's northern territories called the Provincias Internas. This innovation was only partially successful in keeping hostile Indian groups (such as Apaches and Comanches) from menacing Spanish settlements in the far north and in curtailing territorial threats from the French, English, and Russians (Weber, 2005, De la Teja and Frank eds. 2005, Barr 2007, Hämäläinen 2009, DeLay 2009).

Limits to state power can also be seen in the oft-thwarted efforts of the Bourbons to create a less corrupt and self-interested bureaucracy. In 1786, Gálvez implemented a new system of provincial administrators called *intendants* who, along with their lieutenants (*subdelegados*), were to be given salaries adequate to keep them from augmenting their income by exploiting native peoples. Although royal income rose slightly from taxes collected under the new system, the attempts to create a professional bureaucracy did not fully displace longstanding avenues of corruption and exploitation based in patron–client relationships. Even viceroys saw their power of patronage limited by well-established, dispersed networks of political and ecclesiastical power that thwarted centralized rule (Arnold 1988, Cañeque 2004, Rosenmüller 2009). Intra-elite conflicts had been common throughout the colonial period, but the tensions between *peninsulares* (native Spaniards) and *criollos* (American-born Spaniards) were exacerbated by Bourbon attempts to limit *criollo* access to political power while favoring the appointments of *peninsulares* to the newly created political positions.

Looking more deeply at the intertwining of political and economic changes with demographic fluctuations within New Spain itself, we can see that the years between the 1730s and the late 1770s merit further study.[4] In general, with some notable exceptions, the economy grew more rapidly than during any other period in colonial history. Silver production, interregional trade, urban growth, and some agricultural expansion due to rural demographic increases were accompanied by a very slow, healthy inflation.

The prices of maize and other staples fluctuated widely over the short term, pushed by epidemics, droughts, floods, and freezes, but then typically stabilized quite quickly at their formal levels and then continued their slow inflationary ascent (Florescano 1969, Garner 1990).

The horrendous *matlazáhuatl*[5] epidemic of 1736–1739 illustrates the intertwining of demographic and economic phenomena and provides a contrast to the smallpox and famine (*años de hambre*) episodes of 1779–1780 and 1784–1786 (Cooper 1965, Malvido 1992). The *matlazáhuatl* was probably the deadliest of the 18th century with mortality exceeding that of the smallpox epidemic in the late 1770s. Shortages plus hoarding drove up prices, yet recovery to the norm was quite rapid (MacLeod 1986, Molina de Villar 2001). These middle years of the 18th century had a downside, none-theless. Increased economic activity and intensified production of mostly non-perishable goods for medium and long distance trades led to renewed pressures on the laboring population, including rural Indians. Pressures caused by demographic growth, along with increasing intrusions on and seizures of Indian communal lands and *casta* small-holdings, led to land hunger and flight to the cities. This phenomenon has been most clearly demonstrated around Guadalajara and in parts of the Bajío (Brading 1978, Van Young 1981).

The disastrous years between 1779 and 1784, which left such a lasting imprint on popular memory, were quite different and ushered in a new phase. Prices shot up during the hunger years but, unlike the crisis years of the previous half century, did not return to pre-crisis levels. Instead they remained high and the rate of inflation subsequently increased. Indications are that the wages of ordinary people stagnated and fell more and more behind the price increases of basic commodities, with resulting misery. Demographic growth also fell in the hunger years and then again during the civil wars from 1810 to 1816. The prolonged wage–price squeeze that ran from about 1782 to 1816 probably played a significant role in late colonial popular uprisings (Brading 1971, Van Young 1981).

Yet some sectors benefited from economic growth; this was especially true in the mining centers. Mining output increased at an annual average of nearly two percent throughout the century although this growth came in spurts (with peaks in the 1770s and 1790s) and alternated with periods of stagnation. Guanajuato experienced the most sustained mining growth, but other regions flourished at times (e.g. Pachuca, Bolaños, Chihuahua). Periods of growth cannot be attributed to radically improved technology as smelting remained the primary method for extracting silver (thus contributing heavily to deforestation), and the amalgamation (patio) process continued. But the crown did provide tax and credit incentives, as well as better access to mercury for amalgamation, and some improvements such as blasting and new mechanisms for draining water. Heightened labor exploitation, deteriorating working conditions, and the loss of some incentives for mineworkers offer a partial explanation for increased mining output, as do new silver finds and persistent exploitation of old veins (Brading 1971, Bakewell 1984, Martin 1996).

The major success story in mining recounts that of Pedro Romero de Terreros, a poor immigrant from Andalucía, who arrived in New Spain around 1730, and like other Spanish immigrant nephews began his career working for an uncle in Querétaro. By diversifying his investments and using family and political connections, he eventually amassed a fortune which came primarily from his silver mines in Real del Monte and Pachuca between 1747 and 1774, probably making him the richest man in the world at

the time. Like other wealthy miners who generously gave money to the crown, Terreros obtained a noble title of the Count of Regla in 1768. His philanthropy went much beyond his gifts to the crown, including large charitable donations to the Catholic Church and the 1775 founding of the Monte de Piedad, a government controlled pawnshop. With the latter he hoped to reform the habits of workers whom he had long exploited and despised (Couturier 2003, Ladd 1976, 1988). Another mining triumph was the great Valenciana mine at Guanajuato, where immense capital investment and advanced technology paid off. "It was without a doubt the largest single mine ever worked in colonial Spanish America, employing at its peak over 3,300 underground workers and between 1780 and 1810 yielding 60–70 percent of the total output of Guanajuato, itself the unchallenged silver capital of New Spain" (Bakewell (1984) 147).

By 1800, silver mining was experiencing a downturn, but it had provided the bulk of the crown's income from New Spain (which itself furnished more than 60 percent of Spain's colonial income); additional revenue sources included the valuable cochineal dye (Hamnett 1971, Baskes 2001), the tobacco monopoly (Deans-Smith 1992), and other agricultural products such as sugar. In addition to the transatlantic trade, Manila galleons carried Asian goods exchanged for silver.[6]

In general, agrarian production expanded within the colony as the population rose in the latter half of the 18th century, accompanied by shifts from livestock raising to arable farming in areas like Morelos, Guadalajara, and Yucatán (Van Young 1981, Martin 1985, Patch 1994). Increased agricultural output resulted in profits for landowners who expanded and concentrated their holdings, while many peasants were losing access to their subsistence and workers' wages were falling. In the small industrial sector, limited demand due both to falling wages and to contraband stunted the production of textiles and other local manufactures (Salvucci 1988). The changes, often accompanied by increased labor coercion, tended to magnify inequities and create discontent among the lower classes (a topic discussed below).

Although environmental historians (Melville 1994, Miller 2007) differ over the extent to which New Spain's environment deteriorated after conquest, they do agree that by the late 18th century, economic activities introduced by Spaniards, especially mining and livestock grazing, had contributed to deforestation, loss of ground cover, and a decreasing volume of available water. Differences in land and water use practices by Indians and Spaniards inevitably resulted in conflict as population increased and these resources became scarcer in the late colonial period (Meyer 1984, Lipsett 1999, Melville 2000). These problems were magnified in New Spain's arid northern regions (Radding 1997, 2005). As pioneer environmental historian Elinor Melville concluded: "In the struggle to maintain their individual worlds intact within the context of hybrid colonial societies, the different ethnic and economic groups that made up colonial society shaped and constrained one another, and change occurred as Spaniard and Indian, mestizo and mulatto, struggled to reproduce familiar landscapes, very often in the same space" (Melville (2000) 242).

Ecological transformations were not alone in changing New Spain's contours in the 18th century. Dynamic social, ethnic, and cultural ferment was apparent everywhere. Scholarly interest has been most heavily focused on the latter over the last two decades, and most of the published studies share a common theme. Although changes varied across regions and localities, they bore the imprint of local indigenous or creole agency in the shaping of racial discourse, ethnic identity, social hybridity, popular culture, and juridical notions—all processes that often contradicted Bourbon aims to create a more rational society.

Imposed racial hierarchies did not consistently match the realities on the ground. Although scholars have long been aware of this, the attempts to analyze social hierarchies have shifted in focus to reflect the themes of "new cultural history."[7] One approach traces the rationale for the *sistema de castas* by examining the changing meanings of *limpieza de sangre* as the concept was transferred to New Spain and took on a more secular (racial) than religious meaning, with purity of blood becoming more linked to Spanish-ness (or phenotype) than Christian-ness (Martínez 2008). In the 18th century, Spanish elites, obsessed with safeguarding their claim to social primacy, promoted the production of *casta* paintings that depicted unions between partners of different races and their mixed offspring in unflattering ways (Carrera 2003, Katzew 2004). Despite their censorious aim, the paintings reflected what was actually happening in terms of race mixing. Biologically separating the two republics of Spaniards and Indians had never been feasible, but early architects of this attempt probably never imagined the degree to which the *sistema de castas* would be turned inside out and become more unstable as the colonial period progressed.

Across time and space, to varying degrees, particular social and economic conditions encouraged mixed-race liaisons and sometimes advanced social mobility, producing a racial milieu that was highly fluid and vibrant. Nevertheless, both *peninsulares* and *criollos* continued to try to enforce standards of purity, partially by placing more importance on maternal genealogies to prove *limpieza de sangre* and also by promulgating the Real Pragmática de Matrimonios in 1776 which gave parents greater control over the marriage choices of their children (Seed 1988). Interestingly, indigenous peoples also came to invoke blood purity to advance their claims to privileges. Recent scholarship has highlighted how impossible it is to appreciate the complexities of inter-ethnic relations in colonial Mexico without examining the intersections of gender, race, and class. For example, blood was not the only determinant of lower status: economic roles (mechanical trades) also made blacks and Indians impure. Women were seen, at least in theory, as vehicles that could preserve or taint purity through reproduction.

Once again, the theory did not match the practice, as we know from the burgeoning scholarship on women and gender in the 18th century.[8] In addition to the studies of women's experiences, historians have increasingly incorporated gender into their larger analytical schemes. Much of the new scholarship portrays women as active agents in their daily lives and emphasizes women's contestation of Spanish patriarchal norms through which men theoretically exercised control over the sexuality, reproductive capacities, labor power, and public behavior of females. This scholarship makes careful distinctions across ethnic and class lines. For Spaniards, the ideal woman—pious, chaste, and submissive—lived under the authority and protection of her father or husband. When women challenged these expectations, they stained the honor and threatened the racial purity of the family; on the other hand the promiscuous sexual behavior of men was accepted as a natural component of *machismo*. At the same time women did have the right to inherit and control some property (especially dowries); a significant number of Spanish women, especially widows, ran businesses.

They could also choose the convent, where life was not as constraining as one might expect. Many nuns (almost exclusively Spanish women until the 18th century when Mexico became the only Spanish colony to establish Indian nunneries) enjoyed material comforts and were attended by servants. Most chose the profession for spiritual reasons, but others benefited from the possibilities that conventual life offered for education, self-expression in writing, and membership in a supportive and economically productive

community. When some religious authorities tried to purify convents of their worldly ways in the late 18th century and impose more ascetic practices, nuns successfully resisted these threats to their version of cloistered life fashioned over centuries in Mexico (Lavrin, 2008).[9]

Marriage (beyond the spiritual version of the conventual "brides of Christ") was an essential component of strategies to perpetuate elite superiority and dominance, but even within the idealized Spanish patriarchal order, there was much deviation from the norm, thus explaining the implementation of the Real Pragmática mentioned above. In general, Spaniards and Indians tended to marry within their racial groups while *castas* were more eclectic in their choices. Racial exogamy may have increased in the late 18th century in areas of economic growth; at the same time, the numbers of consensual unions seem to have decreased. Across ethnic groups, perhaps one-quarter of households were headed by women at the end of the colonial period, indicating high rates of abandonment by husbands or informal partners (Lavrin 2000).

In general lower strata *casta* and indigenous women were not held as tightly to the Spanish ideals, although rural Indian women were bound by hybrid patriarchal customs that evolved in their often more cohesive communities. Deborah Kanter's (2008) detailed community analysis of Tenango del Valle, south of Mexico City offers a microcosm of the scholarship that portrays the complexities of gender and family relationships as they operated in an idealized social order that was often subverted. In the 18th century when the meanings of being Indian were in flux, both women and men defied the prescribed norms of complementarity and reciprocity. Some women engaged in economic activities outside the home and in promiscuous sexual behavior, and they used the courts to demand redress against husbands who abused and did not provide for them. Sometimes they prevailed and at other times authorities placed them in *depósito* or correctional places that promoted moral reform and pious behavior. Kanter also demonstrates, as others have, that as indigenous communities increasingly suffered land encroachments in the late 18th century, women's claims to land were the first to suffer.

Mestizas and mulattas were often unmarried heads of households; many worked as street vendors, maids, cooks, washerwomen, and midwives. Some were petty merchants with their own stalls in the markets. Indian women also filled the role of market women, but those who lived in rural areas were more likely to be married and performing agricultural labor, domestic chores, and perhaps weaving or other skills. Across the ethnic spectrum, women negotiated their status through a number of channels that included the church, the courts, and even petty witchcraft. The images that we now have of these negotiations of power and of women's lived experiences in transmitting social and cultural values within families and communities are richly diverse, but they do not always present a pretty picture, to the extent that they expose patterns of domestic violence resulting from conflicts over gender rights and obligations in differing cultural contexts (Stern 1995, Kellogg 2005). The new scholarship also begs the question of whether negotiated gendered relations of power provided a foundation for, or rather reflected, general understandings of authority and power.

It takes no stretch of the evidence to suggest that the most pronounced shift in recent colonial Mexican scholarship can be seen in the emphasis on the negotiation of power and especially its relationship to identity, trends reflecting the concerns of a postmodern and postcolonial world. The emphasis has shifted from prescriptions, imposed categories and their meanings, and whether caste or class provided better schemes of classification,[10] to how colonial peoples gave meaning to themselves and their lives—to explore "how

structures of colonial rule were transformed into venues of lived experience, were transformed into identities" (Fisher and O'Hara (2009) ix). Historians have increasingly turned their attention to the interrelationship between how people were categorized and how they understood themselves. To what extent could people recast colonial normative racial prescriptions and negotiate their rights? These processes had evolved over the entire colonial period, but in this chapter we are most interested in how they played out in the face of Bourbon attempts to impose order.[11]

This shift in focus has resulted in innovative new scholarship on Afro-Mexicans in terms of how they appropriated and manipulated Spanish institutions, such as militias and religious confraternities, as well as how they interacted with other racial groups. Although new scholarship has shown how people of African descent had the most trouble overcoming the taint of impurity (Martínez) because they were seen as a threat to the social fabric needing tighter control, they were not without the capacity to make decisions and to act on them (Velázquez 2006). Militias offered free Afromestizos the possibility to advance socially and make strong claims to masculinity (Vinson 2001), although the Bourbons eventually succeeded in blocking access to this path. Afromexican confraternities helped slaves, including women, negotiate between Spanish and African worlds and eventually facilitated the assimilation of mulattos into the larger multiracial society (Von Germeten 2006). The idea that slaves could deploy their Christian status to temper their condition as slaves and form social ties had been explored by Bennett (2003) for the 17th century, and others have shown how slaves used the Inquisition and ecclesiastical courts to protect themselves against brutal exploitation (Villa-Flores 2006).

A number of case studies (Restall 2005) highlight a dialectic of both hostility and peaceful interaction between natives and Afromexicans (both slave and free). Unions (formal and informal) between males and females of the Spanish, Indian, and African ethnic groups had an enormous impact on the ways in which race and status boundaries could be negotiated. Different conceptualizations of a "black middle" and its role in cultural crossings emerge in studies by Laura Lewis (2003) and Matthew Restall (2008). In the former, Spaniards used blacks to control Indians; in the latter, blacks in Yucatán occupied a middle position, engaging both Maya and Spanish worlds, and eventually became part of a vital mixed race society.

How indigenous peoples came to see themselves as imperial subjects entitled to rights over the course of the 17th century has been skillfully developed in older and more recent studies (Borah 1983, Owensby 2008). The flexibility of the Spanish legal system allowed Indians (and others) to pursue litigation as a way of defending their interests. Indigenous collectivities used this tactic most effectively, mastering Spanish legal concepts and vocabularies, to protect themselves in cases related to land, labor, and municipal governance. Although this phenomenon might be seen as proof of royal hegemony as subaltern groups bought into institutions of imperial rule, many studies illustrate that it favored the persistence of indigenous nobilities and ways, albeit often hybridized, at least until the Bourbon period when authorities moved decisively to curb the litigiousness of Indians.

Yanna Yannakakis' study of the Villa Alta region of Oaxaca (2008) provides a twist on how this process unfolded. She demonstrates how a variety of intermediaries (village governors, legal, religious, and commercial representatives, and interpreters) were able to resist attempts by religious and civil authorities to reduce native autonomy and to retain control over the cochineal trade. This "shadow system" of intermediaries and cultural brokers offered a parallel system to colonial institutions for the advancement of

indigenous interests (notwithstanding divisions within and between communities). Determined to end practices that strengthened indigenous autonomy and reduced royal revenue, Bourbon officials, after 1760, developed policies to undermine longstanding webs of negotiations and *costumbres*.

This pattern was repeated throughout New Spain as indigenous rights to land and water, village autonomy, and longstanding exemptions granted to indigenous military allies came under increasing attack in the 18th century (Taylor 1979, Hamnett 1986, Tutino 1986, Van Young 2001). Spanish institutions that had allowed indigenous communities to keep some of their own resources became more vulnerable. For example, Indian *cofradías* had also enabled Indians to manage assets of livestock and even small properties that were rented out. In some cases they served as credit institutions, loaning modest amounts to their members. As the population grew and Bourbon political pressures increased, these resources became more circumscribed.

As we saw in the case of Afromestizos, *cofradías* organized indigenous religious activity and offered Indians crucial space for cultural and social transformations in an era when unconventional religious devotions proliferated. Baroque Catholicism has been characterized as a mixture of "local interpretations, traditions, and festivals that did not always coincide with Catholic orthodoxy" and filled with "excessive exuberance or supposed superstition" (Curcio-Nagy (2004) 108). Its outward displays of processions and fiestas could masquerade as contestations of hegemony.

Local Catholicisms and popular religion took many forms and reflected all manner of syncretisms and hybridities deriving from the interrelationship of religious practice, gender, and ethnicity (Nesvig ed. 2006, Schroeder and Poole eds. 2007). The degree of incorporation of indigenous values and beliefs into these local versions varied throughout New Spain across space and time. Interestingly, scholars who have been able to work with native-language documents in central and southern Mexico have made the strongest case for indigenous re-fashionings of Christian messages (Terraciano 2001, Tavarez 2006). Other scholars agree with William Taylor (1996) that Christianity had a major impact on Indian spirituality although natives identified saints, cults, and miracles in their own cultural terms and with a palpable sense of the sacred.

A recent study by Matthew O'Hara (2009) emphasizes the role of Mexican Catholicism in shaping popular politics. He argues that in late colonial Mexico City and surrounding areas, multiethnic parishioners used church institutions and sodalities as ways of organizing politically and advancing their aims. The church offered plebeians and peasants "modes of belonging" that persisted into the republican era and belied the new nation's ability simply to erase colonial social identities by formally abolishing the caste system.[12]

The strong hold of popular religion on hearts and minds partially explains the Bourbon assault on the Mexican church, although the crown also wanted to restrict the church's control of material assets (Farriss 1968, Brading 1984, Taylor 1996). Bourbon bureaucrats moved to curb the power of the regular clergy through secularization of Indian parishes, restrictions on the building of convents, the expulsion of the Jesuits in 1767, and eventually, in 1804, the appropriation of church assets related to chaplaincies and pious works (Von Wobeser 2003). Limiting the judicial privileges of the church contributed to the overall erosion of clerical power over parishioners, but the crown also hit at the heart of local religious practices by increasingly curbing public religious and civic celebrations (Viqueira Albán 1999, Curcio-Nagy 2004). Ostentatious fiestas, in the Bourbon view, wasted money but worse yet they fostered the overall decadence and laziness of the poor. Such frequently drunken

celebrations represented the antithesis of the values of hard work and frugality that the Bourbons wished to promote. According to the crown, popular piety (especially as demonstrated in the cult of the saints) needed to be purged of excesses and naïve beliefs, but such actions flew in the face of popular religious sensibilities. They contradicted a religious culture visible everywhere in art and architecture and in the ubiquitous visual images of saints, especially the Virgin of Guadalupe.[13] In 1750, in another effort to eradicate superstitious beliefs and control village life, Bourbon officials ordered the establishment of primary schools to teach not only catechism, but also reading and writing (Tanck de Estrada 1999). Since pueblo governments were required to pay teachers, it is not clear that the measure was widely implemented.

The values deemed to promote economic modernization and public order in rural villages also informed Bourbon policies in urban areas. In Mexico City, authorities sought to instill civic virtue by substituting formal, scripted theater for popular festivities like carnival and street performances of music and dance. They discouraged bullfights, policed the streets (that had become the privileged space of the popular social classes), and limited the number of *pulquerías* and other drinking establishments. The second Viceroy Revillagigedo (1789–1794) carried out a campaign to clean up and beautify the city, to remove animals and vagabonds from the streets, and to mandate dress codes for workers (Viqueira Albán 1999). Although these efforts were not successful in stamping out popular traditions, they discouraged participation by the elites who took up other more orderly and less public entertainments from which the lower groups were banned. When the upper classes did linger in public, they were more likely to be found strolling along the promenades (*paseos*) constructed exclusively for their use and entertainment. Attempts by the Bourbons to curb urban crime and control the poor experienced mixed results (Haslip-Viera 1999, Arrom 2000). Nonetheless, Bourbon initiatives to regulate were manifold, reaching across all sectors of society, and especially into associations like religious sodalities and guilds where officials aimed to reinstate racial hierarchies and boundaries. Even Mexico's most prominent painters could not elevate their guild to sufficient respectability for royal approval (Deans-Smith 2007).

These Mexican policies represented a variant of Spanish enlightened thinking: practical, mildly anticlerical, and designed to apply reason and science to achieve "progress", especially in ways that would benefit the Spanish crown. Architects of the Spanish Enlightenment wanted to reform Catholicism, not question the institutional beliefs and practices that impeded modernization (Sarrailh 1957, Herr 1958, McClelland 1991). With this understanding of the religious bias of Spanish reformers, one scholar sees the Mexican reform agenda as guided by an "enlightened Catholicism" focused on the practical application of reason and the eradication of superstitions and exaggerated ritual (Voekel 2002). A group of Mexican reformers who hoped to instill the values of modesty, individualism, and humility directed one of its initiatives against the excessive vanity of ostentatious burials in churches. Not only did the latter have little to do with genuine salvation, they were also a plague-causing health hazard that could be remedied by building public cemeteries away from centers of population.

Empirical thinking also began to permeate the study of medicine, stressing practical experience and requiring physicians to pass medical exams (Hernández Sáenz 1997). These medical reforms, nevertheless, did little to curb longstanding folk curing practices and petty witchcraft among the popular classes. Just as the Bourbon campaigns against popular celebrations promoted the segregation of elites and lower groups, doctors advocated the idea that individual responsibility for the body was the key to good health, thus

placing the blame for illness on the poor themselves. "Enlightened" thought was reso-lutely hierarchical, inegalitarian, and racist and, more disturbing for Spain's long-term goals, it embodied a deep prejudice toward creoles that fueled a reaction—a uniquely Mexican creole patriotism.

No one has written more passionately to develop the idea of "creole patriotism" than David A. Brading (1984, 1991, 2001) whose own corpus of colonial scholarship surpasses that of all others for the 18th century. For Brading, creole patriotism consisted of pride in the Aztec past, the disparagement of the conquest, a heightened resentment against Spanish *gachupines*—a derogatory term for peninsular Spaniards—and the devotion to the Virgin of Guadalupe. Although its roots can be found in 17th-century baroque Catholicism, its inspiration was magnified as a result of the late Bourbon reforms. Alan Knight summarizes the antipathy between *peninsulares* and creoles that resulted from Gálvez's favoring of the former for positions in the courts, military, and bureaucracy. "So strong and pervasive were these notions of creole incapacity and contrasting Spanish efficiency" that some Spaniards could barely hide their contempt. "To the creole, of course, the European appeared as a privileged interloper, enjoying political power out of all proportion to his talent, his local expertise and (often) his material assets" (Knight (2002) 280). In this milieu, creoles rewrote history to encompass the elements outlined above and to celebrate their distinctive natural history and heritage.[14]

Criollo grievances no doubt escalated in the 18th century as their political power became more restricted, but most creoles retained their status as prominent members of the economic elite, especially in the landholding sector. They also had outlets for express-ing their concerns in local societies and literary clubs established in the 18th century to discuss scientific and economic innovations. Indians, peasants, and urban workers affected by the unfavorable material changes elaborated in this article had fewer avenues for giv-ing vent to their discontent, although popular resistance strategies were increasingly apparent as the century wore on.

A number of studies have highlighted adaptive resistance and "weapons of the weak" (Beezley, Martin, and French eds. 1994). Ethnohistorians have been prolific in developing the histories of indigenous responses to colonial rule, with an emphasis on everyday forms of resistance and rebellion. Because colonization occurred later in the north, mission stud-ies constitute a subgenre of works in this vein for the 18th century. They feature the adap-tation and resistance strategies of northern indigenous groups, including Pimas, Yaquis, Tarahumaras, Tepehuanes, and Pueblos, among others (e.g. Radding 1997, Deeds 2003, Hu-Dehart 1981, Patch 2000). Some of the 18th-century resistance studies use the con-cept of "moral economy" to explain how rebellions occurred when a colonial pact that had evolved between colonizers and colonized was breached, as for example in the case of the 1712 Tzeltal Rebellion in Chiapas (Gosner 1992). Rebellions continued in other Maya areas throughout the century (Patch 2002, Rugeley 1996).

For the most part, these rebellions did not succeed in expelling colonizers, even in peripheral areas, and groups that persisted ethnically did so by fleeing to places difficult of access and bereft of resources attractive to Spaniards. In some more settled areas, local outbursts succeeded full-scale rebellion and were designed to achieve concessions from authorities around particular issues, a process described by E.J. Hobsbawm as "bargain-ing by riot" (Taylor 1979, Tutino 1986). Indians and peasants tried to defend their communities and resources while outside pressures increasingly conspired against them as Bourbon officials limited their strategies for negotiation. Localized grievances seethed beneath the surface, sometimes erupting in violence. The fact that these grievances

largely went unanswered begs the question of their relationship to the outbreak of rebellion in 1810 in the Bajío.

The events leading up to Mexico's eventual break with Spain were multifaceted, reflecting material and ideological factors at different levels of society (many of them developed in this chapter), and both internal and external causes. Earlier historiography emphasized particular prominent leaders and ideologies in the context of Spain's fortunes in the Napoleonic wars and stressed peninsular-creole antipathy. This was followed by structural approaches emphasizing the population pressures, subsistence crises, land conflicts, rising taxes, and falling wages that affected the masses (Hamnett 1986, Tutino 1986). The most recent, sweeping account by Eric Van Young (2001) posits a strict separation between national creole elite and local community politics (the latter constituting "the other rebellion"). This scheme rejects the idea that the independence movement was fueled by broad cross-ethnic and class coalitions and insists upon the local, atomized character of Indian/peasant communitarian resistance, dissociated from liberal ideology and nationalist aspirations. No matter which interpretation one finds most compelling, Mexico's first great revolution can only be explained in the context of its colonial experiences and how these were scrambled and reordered in the 18th century. The Bourbon reforms did not produce the modernization imagined by visionaries, but they catalyzed changes in a richly complex and eclectic social and cultural milieu in quite unexpected and consequential ways.

Notes

1   The periodization debate has been ongoing for several decades; for an early discussion of the issues, see Woodrow Borah, "Discontinuity and Continuity in Mexican History," *Pacific Historical Review* 48:1 (1979).

2   A good deal of scholarship on the effects of conquest on native communities and attempts to reconstitute them has been produced by students of James Lockhart who were able to use native language documents.

3   On the questions of the 17th-century European depression and the "decline" of Spain, Henry Kamen has taken issue with a number of historians including J.H. Elliott and Jonathan Israel. See for example "The Decline of Spain: A Historical Myth?" *Past and Present* 81 (November, 1978), 24–50.

4   A good overview of the literature on this period is found in Alan Knight, *Mexico: The Colonial Era* (Cambridge, 2002), 202–296. Several of the major scholars of the economic and social history of the period (David Brading, Eric Van Young, and William Taylor) later moved in the directions of resistance and cultural studies.

5   Historians have not reached consensus in classifying this disease, identifying it variously as typhus, bubonic plague, or hantavirus.

6   Scholars disagree about the overall value of this trade and who benefitted from it. Sources are lacking or imprecise on this largely contraband trade and its significance in either the 17th or 18th centuries. See Louisa Hoberman, *Mexico City's Merchant Elite, 1590–1660: Silver, State and Society* (Durham, NC, 1991); John J. TePaske, "New World Silver, Castile, and the Philippines, 1590–1800," in John R. Richards, ed., *Precious Metals in the Later Medieval and Early Modern Worlds* (Durham, 1983); and James D. Tracy, *The Rise of Merchant Empires: Long Distance Trade in the Early Modern World, 1350–1750* (Cambridge, 1993).

7   New cultural history flows from post-modern, post-colonial shifts that put more emphasis on cultural and moral mediations of the social and the economic. It includes a range of analytic approaches that draw more heavily on humanities than social sciences and that aim to deconstruct texts, giving special attention to how power is negotiated and contested. New cultural

history looks more closely at the hybridity of cultural forms (mentalities, ideologies of subalterns) and the construction of identity, ethnicity, religion, and popular culture. For Mexico, this has meant increased use of judicial records (ecclesiastical, civil, criminal) to get at these more elusive areas of human experience. For an extended discussion of the shift to and pitfalls of new cultural history approaches, see Eric Van Young 2004. In this article, Van Young also distinguishes between ethnohistorical and "cultural" approaches; I would argue that there is much crossover between them.

8   For overviews of women in the colonial period, see Asunción Lavrin, ed., *Sexuality and Marriage in Colonial Latin America* (Lincoln, 1989), and "Women in Colonial Mexico," in *The Oxford History of Mexico*, eds. Meyer and Beezley, 245–273; Susan Socolow, *The Women of Colonial Latin America* (Cambridge, 2000); Karen Vieira Powers, *Women in the Crucible of Conquest: The Gendered Genesis of Spanish American Society, 1500–1600* (Albuquerque, 2005); Susan Kellogg, *Weaving the Past: A History of Latin America's Indigenous Women from the Prehispanic Period to the Present* (New York, 2005); Silvia Arrom, *The Women of Mexico City, 1790–1857* (Stanford, 1985); Ann Twinam, *Public Lives, Private Secrets: Gender, Honor, Sexuality, and Illegitimacy in Colonial Mexico* (Stanford, 1999); Julia Tuñon Pablos, *Women in Mexico: The Past Unveiled* (Austin, 1999). Pilar Gonzalbo Aizpuru has authored or coordinated multiple studies of women and the family, e.g. *Familia y orden colonial* (Mexico City, 1998). The following synthesis relies heavily on the collective works mentioned in this endnote.

9   See the introduction to this book for an extensive discussion of the historiography on nuns by the foremost scholar of Mexican convents.

10   For a good historiographical summary of the race, caste, and class debate that began in the 1970s among Patricia Seed, Robert McCaa, John Chance, and William Taylor, see Aaron P. Althouse, "Contested Mestizos, Alleged Mulattos: Racial Identity and Caste Hierarchy in Eighteenth Century Patzcuaro, Mexico," *The Americas* 62:2 (2005), 151–175.

11   I offer two reflections on this swing in the scholarship to suggest what I see as some strengths and weaknesses. The emphasis on the subjective political behavior of subalterns and the creative use of untapped sources have been highly productive in uncovering the complex webs of power and social ties that could disrupt the state's dictates and desires. These new studies help us see the intricacies and complexities of social and cultural currents that played out over time and that defy easy categorization as merely responses to state policies. However, in our eagerness to find out how colonial peoples gave meaning to themselves—to find dignity—we have a tendency to gloss over the fact that colonial societies had massive majorities of the desperately poor, both in cities and in the countryside. Poor peoples' preoccupations, indeed their daily obsession, had to do with how to find and keep food and shelter, where to get a small loan, the multiple and always unexpected threats of ill-health, premature deaths of children, volatile prices or shortages of maize and beans, locusts, epidemics, droughts, sexual and physical abuse from the strong, theft or loss of what little they had, crop failures, etc. That was daily life for many, but it is curiously submerged in most histories.

12   This book is an outstanding example of the benefits to be gained by looking at the period from mid-18th to mid-19th century as a whole. Other examples include Arrom (2000) and Connaughton (2003).

13   The monumental work of William Taylor, *Magistrates of the Sacred*, develops the reception of the cult of the Virgin of Guadalupe in Guadalajara and around Mexico City, in addition to explaining other manifestations of popular piety. The book also examines tensions over control of community resources among priests, parishioners, and officials in many rural areas, demonstrating also how the Bourbon reforms undermined the integrity of priests in the eyes of the faithful. Public celebrations were at the heart of religious devotion everywhere, and Taylor provides explanations which link indigenous beliefs and practices to the popularity of particular religious fiestas, saints, and images. Taylor also concludes, as did Van Young later

(2001) that the overall participation of parish priests in the independence movement was minimal despite the erosion of clerical authority provoked by the Bourbon reforms.

14 Ironically, even in Spain reformers adopted parts of the patriotic argument that painted the metropolis as having embraced and then acculturated the advanced indigenous cultures they encountered (Cañizares Esguerra 2001).

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The Civilian and the General, 1867–1911

PAUL GARNER

Introduction

The chapter title encapsulates the ways in which the period 1867–1911—a crucial one in defining the history of modern Mexico—has most frequently been portrayed and understood. The title first highlights the personalization of the period, dominated as it was by the presidencies of two of the nation's two greatest statesmen and most influential politicians of the second half of the nineteenth century—Benito Juárez (1861–1872) and Porfirio Díaz (1876–1880, 1884–1911). The title implies that these two presidents single-handedly imposed their personal vision and character on the country and the time in which they governed. This approach has merit, but, at the same time, it clearly diverts attention away from an understanding of the broader historical context in which these individuals acted. The significance of Juárez's and Díaz's long tenures of office can only be properly understood in the context of the nation's early experience as an independent government. In the four and a half decades between the consummation of independence in 1821 and Juárez's victory in the presidential elections of 1867, the political history was nothing if not turbulent. It would be no exaggeration to suggest that the new republic experienced almost permanent crisis throughout most of these years. Indeed, given the extent of domestic tensions, and the external threat posed by the territorial and colonial ambitions of Spain and France and the immediate North American neighbour (the United States) it is remarkable that Mexico survived at all as an independent state. That it did so was largely due to tenacity of mid-century liberal leaders of whom Juárez was the figurehead.

In more general terms, the transition from colony to nation was inevitably protracted and painful. Ethnic, cultural, and regional tensions, and the fragmentation of central political authority that accompanied the process of independence (1808–21), severely hampered the establishment of a strong central state. The struggle for power after 1821 between Mexico City and the provinces, and the conflicts that arose from the attempt to extirpate the colonial legacy (represented above all by the Catholic Church) dominated the politics of the first half-century after independence.

Early national history was pock-marked by bouts of constitutional proclamation and reform, military *pronunciamientos* and *coups d'etat*, factionalism, and civil war, and punctuated by wars of resistance against foreign invasion. Political stability, as measured by the frequent turnover of governments and occupants of the presidential chair, was the most obvious casualty of this turbulence. The contrast represented by Juárez's and Díaz's almost continuous occupation of the presidency for half a century after 1858 is, therefore, in itself remarkable.

The second aspect that the title implies is the profoundly different ways in which these two figures have been represented in the "official," text-book history, as implied by the different approaches to politics and governance to be expected from a civilian president, where one might—stereotypically—expect the president's authority to be tempered by a written constitution and the rule of law, and those to be expected from a president whose background and attitudes to authority (and to rebellion) were formed as a result of the disciplined training and enforced obedience inculcated—equally stereotypically—in an army officer.

Even a cursory examination of the history texts taught in all state schools in Mexico over the last three generations reveals a concerted effort to make a radical distinction between Juárez and Díaz and their respective contributions to national history. The outcome has been highly favourable to Juárez, and distinctly unfavourable to Díaz. While Juárez became firmly identified with nationalism and self-determination, political democracy and civil liberty, the rule of law and the secular state, (and, more recently, since the latter half of the twentieth century) with indigenous rights and resistance to colonialism, Díaz became firmly associated with their antithesis: dictatorship and repression, the abuse of constitutional authority, pro-clericalism, and the wilful violation of national sovereignty, with Díaz in the role of arch xenophile, traitor, and tyrant. These representations have been repeated time and time again, and have proved to be extremely difficult to adjust or correct. They are most clearly demonstrated by the plethora of images, statues, monuments, and street names dedicated to Juárez in innumerable cities, towns, and *pueblos* throughout the country, and the almost total absence of monuments or place-names awarded to Díaz (other than those in his native Oaxaca, although even here it is apparent that even *oaxaqueños* prefer Juárez to Díaz). This chapter demonstrates that these representations—especially in the case of Porfirio Díaz—are based upon premises that are fundamentally flawed, and that they have been the most important factor responsible for creating an artificial distinction between the two protagonists.

The Historiographical Challenge

Perhaps the greatest irony of the modern (i.e. twentieth-century) cult of Juárez is that it was the product of the Díaz era. In 1887, following the first re-election of Díaz to the presidency in 1884, the government sponsored the first public commemoration of Juárez's death. The celebration would be repeated annually, culminating in the lavish celebrations of the centenary of his birth in 1906, as the Díaz government made persistent attempts to exploit the myth of Juárez by casting him in the role of precursor to the Díaz regime (Weeks (1987) 27).

The central problem in approaching this period is, therefore, to challenge the persistence of historiographical distortions and myths relating to these two central figures. It requires remembering that historiographical distortions apply not only to the comparisons between Juárez and Díaz, but also to the different interpretations of both regimes

by contemporaries and subsequent historians. Juárez was—and continues to be in some quarters—excoriated by Catholics for his secularism and what they see as his "attack" on the Church. Other contemporaries painted Juárez as an ineffectual provincial lawyer devoid of merit or historical significance (Hamnett (1994) 244–51).

In the case of Díaz, his image, and that of his regime, has been subjected not only to "official" revolutionary *antiporfirista* demonization already referred to, but also an equally distorted *Porfirismo* during the lifetime of the regime, and to a revival of a *neo-Porfirista* cult since the late 1980s (Garner (2001) 1–15). *Porfirismo* describes the highly favourable, very positive contemporary portrayal of Díaz and his regime, supported by a combination of official sponsorship and censorship by the regime itself. This positive portrayal reached its apotheosis in the extravagant *Fiestas del Centenario*, the month-long celebration of the centenary of independence from Spain in September 1910 that presented, for both domestic, but principally foreign, audiences an inflated but highly effective vision of the regime's achievements in state and nation-building. *Neo-Porfirismo*—the far more positive interpretation of the Díaz regime that developed in the 1980s and blossomed in the 1990s—also reflected fundamental shifts in policy and political priorities by the governing Institutionalize Revolutionary Party (PRI) during its last periods in office. These years witnessed nothing less than a radical restructuring of the political economy in the wake of the devastating impact of the debt crisis. It is clearly no coincidence that the positive re-evaluation of Porfirian liberal economic strategy, for example, coincided with the neo-liberal strategy of PRI administrations during the same period.

At the same time, in recent years, there have been a number of factors that have facilitated the task of applying greater objectivity and more dispassionate study to the history of this period. First, the proliferation, sophistication, and professionalization of Mexican historiography in the second half of the twentieth century have all been the result of the increase in resources being devoted to its history. The published research of historians working both within and outside Mexico has, as a result, provided new and, above all, more nuanced interpretations. At the same time, the work of professional historians has been given added stimulus and new outlets for expression and publication by the cultural penchant—and political imperative—for the commemoration of significant anniversaries and markers in the historical evolution of the nation. Two recent cases relevant to our subjects have been the bi-centenary of the birth of Juárez in 2006, and the bi-centenary of independence from Spain (and the first centenary of the Revolution) in 2010. These multiple, and—in the case of the latter—sometimes spectacular commemorations, have involved national and local governments, all major universities and publishing houses, and a broad range of cultural institutions in attempts to respond to, and in turn to stimulate, the interest of the general public. While it might be argued with some justification that these official celebrations tend to perpetuate rather than challenge prevailing historical myths in a country with a powerful tradition of state-sponsored *historia patria*, they have also provided further opportunities for academic reflection and historical re-interpretation as well as broader public discussion.

What emerges from these new and nuanced interpretations is the simple fact that Juárez and Díaz share far more similarities than differences. Both, for example, were products of the same provincial milieu, and they shared similar, although not identical, social and cultural roots. An understanding of the provincial background of both men proves vital to understanding the origins, actions, and impact of Juárez and Díaz in the national arena.

Provincial Origins

Both men came from humble origins. Juárez was born in 1806 into a Zapotec peasant family in Guelatao in the Sierra Norte of Oaxaca—subsequently renamed the Sierra de Juárez in his honour. Díaz, whose father was an innkeeper who died when he was only three years old, was born in 1830 in the city of Oaxaca into a *mestizo* family originally from the Sierra Mixteca. As young men, both had trained for the priesthood before making the significant career change of embarking on careers as lawyers. Both studied law, although Díaz, unlike Juárez, never received his formal degree required to practice law, at the influential secular Institute of Arts and Sciences, founded in 1828 in the City of Oaxaca.

Both became freemasons in Oaxaca, and both attained the highest Masonic grade, the 33rd degree. In Mexico, as throughout the rest of Latin America and in Catholic Europe, freemasonry played a significant role in nineteenth-century political life. First established by *criollos* in colonial Spanish America in the 1790s, the lodges were voluntary, clandestine organizations that championed the rational ideals of the Enlightenment, democratic ideals, public service, and patriotism. Masonry therefore exerted a strong appeal to liberal republicans who sought to challenge the institutions and beliefs associated with colonialism, privilege, and the *ancien régime*. As a result, Masonic lodges became centres of political conspiracy and debate, and they had a crucial role in the independence struggle and its aftermath throughout Spanish America. After independence, Masonic lodges continued to serve as important centres for the dissemination of liberal ideas, especially in the absence of what we would now understand as modern political parties. Freemasonry also provided a crucial link between liberal politics and the construction of political networks or factions which revolved around the leadership of particular individuals. These informal, personalist networks or cliques, known as *camarillas,* were—and still are—a fundamental feature of Mexican political culture.

In comparison to some of their contemporaries and peers, neither Juárez nor Díaz were great writers, thinkers, or speakers, but both were consummate, astute, shrewd, and, above all, pragmatic politicians, who proved to have an almost insatiable appetite for securing and retaining authority. Oaxaca, in the evolution of their political careers, served as an important laboratory in which these future presidents would undergo formative experiences and develop their political skills. Both learned the tools (and also many of the tricks) of the politician's trade while holding office in their native state: Juárez as Governor of Oaxaca (1847–52, 1856–57), Díaz as Subprefect for Ixtlán (1855–56) and Military Commander and Governor of the Department of Tehuantepec (1858–59).

It is, therefore, vital to understand the link between Oaxaca and the evolution of the nation in the nineteenth century. Oaxaca served as one of the "cradles" of nineteenth-century liberalism, and produced two generations of liberals who would play a prominent role in both local and national politics. The distinctive features of late colonial and early nineteenth-century Oaxaca were a provincial elite that based its wealth on trade and commerce (rather than the ownership of large estates); a Church whose influence was limited to the regional capital; and a diversity of indigenous communities that had retained a significant degree of cultural, economic and political autonomy throughout the colonial period.

The Church and the indigenous communities shared very different fates during the struggle for independence and its aftermath. Both were destined to come under sustained attack from liberal attempts to eradicate the colonial legacy, but in practice their experiences in Oaxaca were very different. The Church bore the brunt of the liberal assault.

Already bruised economically as a result of the forced loans demanded by the Spanish crown in the late eighteenth century, it struggled in vain to retain its role as the principal source of credit, and its control of properties and estates in the face of the liberal onslaught on corporate property.

By contrast, the political survival of the indigenous communities after independence was ensured by the Oaxaca State Constitution of 1824, with almost every former Indian *pueblo* receiving the status of *ayuntamiento constitucional* (municipality), which was certainly not the case in other states within the new republic. Not only did the indian *pueblos* of Oaxaca obtain legal status, they also managed to retain their communal lands throughout most of the century, despite liberal advocacy of the privatization of all corporate property, whether owned by the Church or the indigenous communities. This was because liberal leaders, especially Juárez and Díaz, were conscious of the need to deal sensitively with the interests of the indigenous communities on whose support they depended.

Oaxaca's other significant political legacy of the independence struggle was the broad appeal of federalism and regional autonomy among the provincial elite, encapsulated in provincial resistance to the imposition of central authority from Mexico City. The balance between the re-establishment of central authority (centralism), and the defence of regional autonomy (federalism), became one of the central issues in nineteenth-century politics and, as Juárez and Díaz were always acutely aware, represented a persistent obstacle to the consolidation of the central state.

In short, the colonial legacy inherited by Oaxaca's political leaders after independence presented a complex set of problems. Subsistence and pre-capitalist production, Hispanic tradition and indigenous autonomy co-existed with liberal constitutionalism and capitalist enterprise. The consolidation of the liberal project in the aftermath of Independence would require the skilful and sensitive dismantling of colonial structures, and the creation of new economic and political models: first, the creation of an infrastructure to support trade and commerce in order to restore a fragmented and dislocated economy; second, the inculcation of citizenship, nationhood, popular participation and the rule of law in a caste society riddled with ethnic and class discrimination; third, the preservation of a precarious and highly sensitive balance, on the one hand between local, community, state, and central power, and, on the other, between the extension of political representation and authoritarian practice.

Faced with these daunting tasks, it is hardly surprising that Oaxaca's liberal politicians—among whom Juárez and Díaz were both typical *and* exceptional— demonstrated a strong streak of pragmatism. Oaxaca produced two generations of talented and capable politicians who were conscious of the economic, social, political, and cultural realities of their region (*patria chica*), and who were able to translate their experiences onto the national stage. From this provincial milieu, both Benito Júarez and Porfirio Díaz emerged.

The Liberal Project

Both Juárez and Díaz, as liberals, committed fully to the nineteenth-century liberal project. Inspired by the US and French Revolutionary and Spanish liberal precedents, nineteenth-century Mexican liberals sought to replace the *ancien régime* of absolutist monarchy, corporate privilege, and colonial constraint with a federal republic based upon popularly-elected, representative institutions that would foster and protect broad-based citizenship, legal equality, and secular society. The essential dilemma was how to

bring these aspirations to fruition within a political culture characterized by the maintenance of colonial institutions, and by distinctly authoritarian and anti-liberal practices, without resorting to the very evils liberalism aimed to destroy—namely *caudillismo* and dictatorship.

The ability to maintain equilibrium between these conflicting traditions would be the key to the success or failure of all nineteenth-century liberal administrations. Constantly subverted by the many personal, factional, and ideological divisions within the liberal camp, and the persistent need to adapt liberal principle to political reality, it proved to be an immensely difficult balance to achieve. That both Juárez and Díaz held power for so long in these circumstances was therefore a testament to their exigent pragmatism as much as to their adherence to liberal principles. Both had to resort to illiberal and even anti-liberal tactics—for example, the imposition of favoured candidates to sensitive political office, subtle (and not-so-subtle) electoral manipulation—in order to govern a country riven by internal conflict and division and threatened by external colonial ambitions. Both, in other words, had to adapt to the prevailing political cultures of nineteenth-century Mexico: first, the adherence to constitutional principle as the cornerstone of liberal political practice; and second, the traditions of patriarchal authority and the complex network of patronage represented by *caudillismo*—in other words, the exercise of personal, authoritarian, and non-institutional power so common in the Hispanic world.

Perhaps the best, if rather crude, way to understand the similarities and differences between the political careers of Juárez and Díaz is to see them as representatives of these two political cultures but, at the same time, to understand that they were two sides of the same coin. Therefore, while Juarez's political persona was clearly rooted in advocacy, adherence to constitutional principles, and the rule of law, he was also prepared to bend these principles in practice. Díaz's adherence to personalism, patronage, and *camarilla* politics always formed a more important part of his political armoury than was the case of Juárez, but he certainly understand the fundamental importance of adhering to constitutional practice, especially in the conduct of elections. Clearly in the case of the Díaz regime, adherence to constitutional practice became less important than political management as the regime became progressively consolidated after 1884.

Given the constraints of a short chapter, I examine the chronology of the period 1867–1911 in three sections, each retaining an emphasis on the centrality of the liberal project, but examining the differences in approach adopted by the Juárez and Díaz governments, and the context in which they took shape. The first discusses the period of fractious liberalism (1867–1876), which includes Juárez's second (and final) presidency after the restoration of the Republic in 1867 until his death in 1872, and the presidency of Sebastián Lerdo de Tejada (1872–76); the second describes the period of pragmatic liberalism (1876–1884), which includes the first presidency of Porfirio Díaz (1876–1880) and the presidency of Manuel González (1880–84); the final section investigates the period of patriarchal liberalism (1884–1911), which covers the second, third, fourth, fifth, sixth and seventh presidencies of Porfirio Díaz.

Fractious Liberalism (1867–1876)

The execution of Archduke Ferdinand Maximilian, erstwhile Emperor of Mexico, in June 1867, not only represented the end of French colonial ambitions in the Americas, but also threw down a challenge to any future European or United States colonial

ambitions in the region. In domestic politics, it represented a turning point as an inde-pendent nation: the defeat of the conservatives, monarchists, and the ecclesiastical hierarchy, and the definitive restoration of the Republic. Juárez had played the major political role since 1858 as the Republic's *de facto* and *de jure* president, and Díaz had played a prominent part as one of the leading—and most successful—republican military commanders. The task now facing the triumphant liberal coalition was to convert this definitive victory into a period of political peace and stability so that the task of building the state and nation, so often compromised by factionalism, civil war and foreign inva-sion since the birth of the Republic in 1821, could now begin in earnest.

Nevertheless, despite the absence of a conservative political opposition, Presidents Benito Juárez (1867–1872) and Sebastián Lerdo de Tejada (1872–76) could not turn liberal victory into a period of sustained political stability. In effect, the conservative, moderate, or radical wings of the liberal movement proceeded to abandon their own rules of conduct and resorted to unconstitutional political practices (Hamnett (1996) 659–89). It appeared that liberal principles could only be implemented through anti-liberal practices.

The first serious schism to develop within the ranks of the Liberal Party had occurred over President Juárez's November 1865 decree extending his term of office until such time as elections could be held. The challenge to this "unconstitutional act" came from the President of the Supreme Court, Jesús González Ortega. Because the President of the Supreme Court was next in line to the office of national president itself, the office became a source of significant political activity during the Restored Republic. Not only González Ortega, but also both Sebastián Lerdo de Tejada and José María Iglesias, would challenge for the presidency from the Supreme Court office in 1872 and 1876, as Juárez himself had done in 1858 (Perry (1978) 36–8).

The controversy highlighted what would become the principal political challenge to both the Juárez and Lerdo administrations between 1867 and 1876, that the incumbent regimes abused the Constitution of 1857 by attempting to create a self-perpetuating dictatorship through the manipulation of the electoral process, and the attempt to centralize political power and thereby undermine the political sovereignty of the states within the federal republic. In short, for the radical liberals (known as *rojos* or *puros*) in this period, who increasingly looked to Porfirio Díaz as their saviour, Juárez and Lerdo were guilty of "executive centralism" and personalist despotism.

A second, and more profound internecine conflict within the liberal camp resulted from the August 1867 *Convocatoria* for popular elections. In the *Convocatoria*, Juárez attempted not only to reform the Constitution of 1857—considered by *puros* to be almost a sacred text—by creating a second chamber, or Senate, and by introducing a presidential veto over legislation, but also to bypass the constitutional procedure by which such amendments could be made. Electors were asked, by means of a plebiscite, to endorse the principle that Congress would be empowered to ratify the amendments without the prior approval of the majority of state legislatures.

Juárez's backing for constitutional reform again prompted accusations that he har-boured dictatorial aspirations, and hardened divisions that had long been brewing within the party. So vociferous was the protest that Juárez was forced to capitulate on the pro-posed reforms, particularly on the procedure for ratification of constitutional amend-ments. The extent of radical opposition to the *Convocatoria* added extra spice and momentum to the presidential elections of October 1867, since the radical wing of the party actively campaigned for the candidacy of Díaz and against Juárez.

Nevertheless, the growing momentum of the electoral campaign towards the end of 1867 was insufficient to ensure victory for Díaz. Juárez's prestige and popularity, in combination with some adroit electoral manipulation, won the election for the incumbent president. According to Laurens Ballard Perry, Juárez had, for example, replaced political opponents in the governorship of critical states (especially Guanajuato and Puebla), who had, in turn, replaced district *jefes políticos* in order to ensure that electors from the district electoral colleges would return a favourable vote. Defeat in the presidential election of 1867 spurred Díaz to turn to political conspiracy and, ultimately, the path of military rebellion. On November 8 1871, following months of negotiation, Díaz formally launched the Plan of La Noria, published by the state government of Oaxaca—now under the control of his brother, Félix, who declared himself to be in rebellion against the Juárez government under the banner of "the Constitution of 57 and Electoral Freedom." The Plan had been preceded by a series of regional military rebellions against the Juárez government. Despite these apparent advantages, Díaz's military campaign was singularly unsuccessful.

The definitive end to the rebellion of La Noria did not come as a result of military defeat or inadequate leadership, but rather as a consequence of the sudden death of Juárez in July 1872. The next day (July 19), Lerdo de Tejada, President of the Supreme Court, was nominated as interim president, and a week later he called simultaneously for presidential elections in October and offered an amnesty to the *Porfirista* rebels. Lacking in coordination, morale, and any political justification for continuing the rebellion, the majority of Díaz commanders accepted the presidential offer. Díaz remained elusive, until his final acceptance of defeat in October 1872. The extent of the decline in his political fortunes appeared the same month by the virtually unanimous election of Lerdo as constitutional president.

Lerdo's most controversial political manoeuvre as president, and one which played directly into the hands of the *Porfirista* opposition, was his decision to seek re-election in 1876. He justified his decision in order to maintain political stability, in fact it produced the reverse. As had been proved on many occasions during the Restored Republic, anti-reelectionism remained one of the most controversial political questions of the late nineteenth century as it had formed a vital plank in the opposition to Juárez in 1865, 1867, and 1871, and would remain one of the major rallying points for the opposition to Díaz throughout the Porfiriato. In 1876, not without considerable irony in the context of Díaz's own later persistent re-elections, it became the principal *raison d'être* of the Tuxtepec rebellion which Díaz launched in January 1876. That he chose to uphold the sanctity of the Constitution by means of a military coup highlights the central paradox of nineteenth-century liberal politics that justified the attainment of representative institutions by authoritarian means. In the abuse of constitutional practice, especially in the manipulation of electoral advantage, it would be difficult to argue that, prior to 1888, Díaz was any more guilty than either Juárez or Lerdo.

The triumph of the Tuxtepec rebellion brought Díaz the presidential office he had coveted since 1867. It had been achieved not solely as a reflection of his ruthless pursuit of personal ambition, but as a result of a combination of significant popular support in central and southern Mexico and careful military and political preparation. Those who had supported the Plan of Tuxtepec represented an eclectic coalition, including former conservatives and former supporters of Maximilian who opposed Lerdo. Nevertheless, the triumph of the Tuxtepec campaign should principally be seen as the culmination of the radical (and popular) liberal (*rojo/jacobino*) challenge to the constitutional "abuses"

committed by Juárez and Lerdo since 1867, supported by National Guard units from Puebla, Oaxaca and Veracruz who sought redress for Lerdo's failure to implement the constitutional guarantees of effective suffrage and municipal autonomy. The Tuxtepec rebellion, in other words, had a genuinely popular base.

Pragmatic Liberalism 1876–1884

The most pressing task for the first Díaz administration was to establish, first and foremost, a period of internal political peace. This remained a consistent priority throughout his entire regime. Its contemporary apologists (and subsequent *Porfirista* historiography) considered the establishment of the *pax Porfiriana* as one of its principal achievements, and it became the main justification for successive re-elections after 1884. Despite these confident assertions of the definitive establishment of peace, it is nevertheless clear that throughout the lifetime of the regime political peace was far from complete. The regime was consistently buffeted by political turbulence, ranging from indigenous and agrarian rebellion to anti-reelectionist political agitation.

At the same time, it is important to emphasize that the supreme authority that Díaz sought to establish, and his enemies accused him of abusing, was in reality much less supreme than it appeared. In the mosaic of politics at both national and regional level, the achievement and maintenance of power was a process of constant negotiation and renegotiation. Consequently, neither *Porfirista* historiography—which praises Díaz as a supernatural man of destiny—nor its *anti-Porfirista* counterpart—which caricatures him as a brutal tyrant—capture the essence of his politics.

Little evidence of political peace exists before Díaz's second re-election in 1888. Nonetheless, he adopted the strategies for its achievement from an early stage after 1876. They included repression, coercion, intimidation, and, in at least one celebrated case in Veracruz in 1879, the assassination of political opponents. At the same time, such authoritarian practices co-existed with, and, ultimately, were less important than mediation, manipulation, and conciliation; in other words, the politics of pragmatism and *realpolitik*. For more than a decade, the implementation of multiple strategies proved to be a tentative and difficult process, given the political inexperience of Díaz and the majority of his *tuxtepecano* followers, and the scarce resources available to the central state in 1876.

Nevertheless, from his first term of office, it is possible to identify the principles of political practice that became characteristic of the Díaz regime. First, the distinction between ideology and practice and, in its wake, the strong advocacy of pragmatism, became one of the hallmarks of the regime; second, the importance of patronage in the construction of ties of personal loyalty and deference to the supreme authority of the president that fuelled the entire Porfirian system; third, the strict formal observance of constitutional practice, especially in the conduct of elections at state and national levels; fourth, the maintenance of a delicate balance between central and state (federal) authority, perhaps the most intractable nineteenth-century political problem, which was seen most clearly in Díaz's relationship with state governors; and, fifth, the adoption of force, intimidation, and other authoritarian practices as necessary tools for the maintenance of political peace.

Despite the emphasis on pragmatic political management, rather than constitutional principle, during his first term Díaz showed a commitment to *puro* liberal principles as

enshrined in the Plan of Tuxtepec. Significantly, this resulted in a constitutional amendment in May 1877 that prevented consecutive presidential re-election. This obliged Díaz to stand down from office at the end of his first term in 1880, which he did. While it can hardly be argued that Díaz kept a low profile during the government of his successor and close political associate, Manuel González (1880–1884) was no mere imitator or "puppet" (Coerver (1979). At the same time, Díaz made no secret of his willingness to seek re-election, despite his refusal to make any public statements on the matter. He allowed his supporters to conduct political negotiations to this end, and to mount a successful press campaign that attacked the González administration for financial mismanagement. The mounting unpopularity and public criticism of González clearly had beneficial consequences for Díaz's re-election to the presidency in 1884.

Patriarchal Liberalism 1884–1911

Porfirio Díaz's first re-election to the presidency in 1884 marked a significant watershed in the political evolution of the regime. As a foretaste of what was to come, Díaz was unopposed in the election. Thereafter, a dual process of consolidation and transformation took place in the regime. While many of the mechanisms and tactics of political pragmatism continued to be employed in the attempt to mediate and manage factional divisions, the personal and patriarchal authority of the president at the apex of the hierarchy of power became gradually consolidated, and increasingly uncontested.

In accordance with the regime's adherence to liberal constitutionalism, the process of consolidation was legitimized by two amendments to the Constitution of 1857. The first, in 1887, permitted consecutive re-election, and thus allowed Díaz's second re-election in 1888. The second, in 1890, removed all restriction on future re-election to public office, allowed Díaz's third re-election in 1892, and gave legal endorsement to the fourth, fifth, sixth, and seventh re-elections in 1896, 1900, 1906, and 1910. But, although constitutional liberalism continued to provide the framework for the regime, its content was progressively ignored in practice. As José Valadés remarked many years ago, the regime increasingly lacked any coherent doctrine, other than subordination to the will of the patriarch (Valadés (1941–48). This allowed the regime, simultaneously and without contradiction, to be liberal and conservative, pro-foreign and nationalist, Masonic and confessional. The essential pre-requisite was that each faction or interest group, irrespective of ideology, must submit to the authority of the president.

As a consequence, the authority of Don Porfirio became gradually unassailable, and "necessary" (in the words of Daniel Cosío Villegas, Díaz became *El Necesario*, the Indispensable). He became the patriarch of the nation, and the custodian and arbiter of the rules of conduct of political life. This meant not only the assertion of personal authority over the institutions which governed the conduct of politics (the cabinet, both houses of Congress, the state governors, the state legislatures, the regional *jefes políticos*), but also over the institutions which had played a decisive role in nineteenth-century politics (above all, the army, the Church, and the press). The evolution of a cult of personality around the figure of Don Porfirio became an integral part of this gradual accretion of power.

Although the regime became increasingly centralized and authoritarian, nevertheless important constraints existed on presidential authority. In other words, Díaz never enjoyed the absolute political control that his critics have argued, because the process of centralization and consolidation was always contested, challenged and resisted at a

variety of levels. Political factionalism, dissidence, and rebellion remained constant during the era. Under these circumstances, the projection by the apologists of the Díaz era as one of untroubled political peace or *pax porfiriana*, requires serious revision. Even though we still know little about the microhistory of local and regional political practice in this period (this has not been a fashionable topic of recent research), when these studies become available, as they have begun to, (McNamara (2007) they are likely to reveal with greater clarity the astonishing heterogeneity of the nation and the limited scope of central authority. Given the extent of both factional and regional conflict, the achievement of the regime in maintaining central authority and in managing and diffusing factional divisions was all the more remarkable. The degree of "macro" political stability achieved by the Díaz regime between 1884 and 1906 was unparalleled in the nation's independent history.

Two central themes emerge in the conduct of politics after 1884: Díaz gradually altered the management of *camarilla* (factional) politics. His loyalty to the *camarilla* associated with the Plan of Tuxtepec in 1876 (whose members were known as *tuxtepecanos*) was gradually transformed after 1884 into the management of competing factions by playing them off against one another, and ensuring that each faction recognized the authority of the president and his role as arbiter. The second, overlapping theme was the progressive subordination of all political actors (from cabinet members to regional *jefes políticos*) to the patriarchal authority of the *caudillo*. This represented authoritarianism by stealth, within the framework of liberal constitutionalism. It can perhaps best be described as a form of patriarchal liberalism.

The exercise of patriarchal liberalism formed the heart of the process of political centralization and consolidation after 1884, but it led at the same time to what Cosío Villegas described as the "petrifaction" of politics, and to the preference for the administration of politics rather than the open or democratic practice of political debate and electoral competition. This has given rise to the much-quoted, and appropriate, dictum first articulated by Ignacio Vallarta (President of the Supreme Court in the first Díaz administration), and subsequently used to describe the nature of Porfirian politics in this period: *"poca política, mucha administración"* (very little politics, but a great deal of administration).

The Demise of the Díaz Regime

Patriarchal liberalism, especially between 1884 and 1898, but arguably beyond that up until Díaz's sixth re-election in 1906, managed to keep the notoriously volatile political life free of the degree of instability that had always characterized it throughout the nineteenth century. The regime also achieved notable successes in the fields of international relations and economic development. Over this period, Mexico vastly increased the scale of domestic and international trade, attracted ever-increasing levels of foreign investment, and embarked upon an ambitious project of railway construction and public works that transformed the economic and social infrastructure of much (but certainly not all) of the country. Ironically, the years immediately preceding 1910 can be seen, therefore, as a period in which the regime became a victim of its own economic success. The developmentalist economic strategy, and the remarkable strengthening of international standing among overseas governments, financiers, and diplomats, had unquestionably made a significant contribution to the consolidation of the regime. At the same time, a number of problems were gnawing at the Porfirian body politic,

related to the uneven distribution of wealth, economic resources, and social benefits, and the failure to broaden the scope of political participation and democratic legitimacy.

The regime's responded to the growing political crisis after 1906 in hesitant, inconsistent, generally inept, and, on certain notorious occasions—such as the repression of the mining and textile strikes of 1906 and 1907—repressive and brutal ways. The adoption of authoritarian tactics after 1906 revealed an increasing desperation. Because of the predominance of heavy-handed tactics adopted by the regime after 1906, there has been a marked tendency to assume that the repressive character of the regime during its last years was representative of the regime as a whole. This analysis, however, provides a distorted picture. The growing political and economic crisis after 1900 certainly exposed the weaknesses and brittleness of a personalist political system, but they demonstrated above all that the mechanisms and techniques of the type of patriarchal liberalism which Díaz had skilfully employed since 1884 no longer served, two decades later, to deal with a changing set of circumstances.

No doubt after 1906 the regime adopted increasingly repressive tactics in dealing with growing manifestations of discontent and dissidence. These repressive measures were not only counter-productive, but also patently unsuccessful in suppressing the political and popular protest that coalesced under the banner of the Anti-Reelectionist Movement after 1909. What is most striking is the speed with which the regime collapsed, and it took contemporaries completely by surprise. Only six months after Francisco Madero's call for armed revolution in November 1910, Porfirio Díaz, who had monopolized political power for more than a generation and had presided over a regime that had prided itself upon its solidity and permanence, had resigned and sailed into European exile. The rapid collapse of the regime created a problem with which historians have been grappling ever since.

The reasons for the fall of the Díaz regime can be broken down into two main categories. First, the complex pattern of internal dislocation and disruption to the structure and fabric of Porfirian society, both at a national and a regional level, was an important determinant of the popular mobilization that helped to bring the regime down in 1911. Second, internal schisms progressively undermined the self-confidence of the regime and the fragile equilibrium of elite consensus that stimulated rivalry, conflict, factionalism, and division within the inner circle of the political elite, and between those within the inner circle and those on the margins of Porfirian politics. As political pressures mounted after 1900, the regime responded with a combination of impotence and repression. It became increasingly clear that the regime could no longer control political life in the way it had done since 1884.

Furthermore, no solution had been found to the problem of political succession, a problem which became more pressing as Díaz approached his seventh re-election in 1910. This resulted in an intense power struggle within the inner circle of the regime, and growing opposition to re-electionism from outside the political elite. The problem was made more acute by the deliberate obstacles which had consistently been placed in the way of the development of political institutions or parties, which deprived the regime of an institutional form of succession. As a final consideration, the prodigious energy and the skill and appetite for political manipulation which Díaz had displayed in the maintenance of a highly personalist system had begun to desert him as he approached his eightieth year. Ultimately, it was the petrification of domestic politics that led to the regime's demise.

Conclusions

This chapter argues that the profound distinctions between Juárez and Díaz were created by an official historiography which for most of the twentieth century attempted to eulogize Juárez and demonize Díaz. This is not to say, of course, that there were no differences between the "civilian" and "soldier" presidents. There clearly were, especially as regards Juarez's clear and consistent commitment to constitutionalism and the rule of law, or, in other words, to the political culture of citizenship, and his opposition to *caudillismo* and authoritarian politics—or, as Octavio Paz later described it, to the political culture of the pyramid. By contrast, Porfirio Díaz' commitment to the former was real, but always more ambiguous, and subordinate to the quest for political stability and the quest for political power. These last two ambitions were also shared by Juárez, and they forced him to make important political compromises, in other words, to implement liberalism by anti-liberal practices. In the case of Díaz, by the end of the regime the commitment to constitutionalism had become consigned to empty rhetoric, and was all but invisible.

In short, the differences have been greatly exaggerated. In a revealing letter in 1876 from Díaz to General José Guillermo Carbó, in an attempt to persuade Carbó to endorse the Tuxtepec rebellion, Díaz explained his relationship to Júarez:

> "As a gentleman and a man of patriotism, a brother and colleague of the second war of Independence (i.e. the struggle against the French Intervention), in your hands lies the rapid and permanent organisation of the next government. … I am incapable of recommending any course of action to you which is not noble or dignified … *remember that that I was forced to turn against Juárez politically, in spite of the close personal bonds of friendship which united us, only because I judged that the Constitution had been damaged. … and Juárez's actions were nothing by comparison to the political crimes committed against the Constitution by (President) Lerdo* [my italics]. The government has lost its legitimacy. A country can never call itself truly constituted unless its citizens, including those who command its troops, are resolved only to follow the government if it abides by the rule of law, the standard bearer of its liberties. No honourable or patriotic soldier ought to support a government which has broken the pact with the people which the constitution represents." (Díaz to Carbó, 8/11/1876, Colección Porfirio Díaz, Universidad Iberoamericana, Mexico City)

Benito Juárez and Porfirio Díaz should be seen, therefore, as different faces and facets of the liberal project of the nineteenth century, which sought to build a strong, independent secular state, and a prosperous, sovereign nation. Both can point to significant achievements along the road to achieving these elusive goals, alongside significant shortcomings. A final irony, which might demonstrate the similarities of their political practices, might best be expressed in terms of counterfactual speculation. Had Juárez survived beyond 1872 he would almost certainly have justified his own subsequent presidential re-election, and perhaps provoked a revolution. And had Díaz stood down from office in 1910, as he publically promised to do in 1908, he would—with almost equal certainty—have been elevated to the pantheon of national patriotic heroes.

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Two Centuries of Independence: The Republican Century

Independence and the Generation of the Generals, 1810–1848

CHRISTON I. ARCHER

Until 1810, few Mexicans (or Novohispanos) could have imagined that following the attainment of national independence in 1821, the army of New Spain might produce anything like a generation of dominant generals capable of controlling national politics and retaining power for many years. Indeed, before 1810 the regular army consisted of four regular infantry regiments each with officers, NCOs, and theoretically with complements of 961 soldiers (the Infantry Regiments of the Crown, New Spain, Mexico, and Puebla), an expanded infantry battalion of 881 soldiers permanently stationed at the strategic port of Veracruz, two dragoon regiments, two artillery companies stationed at the fortress of San Juan de Ulúa, and two light infantry Companies of Catalonia. In fact, these units often were notoriously under strength and the Infantry Regiments of Mexico and Puebla were sent to help defend Havana and not returned for many years. In the northern Provincias Internas (Internal Provinces), there were small frontier companies to protect against attacks by so-called "barbarian Indians" that included the Comanche and Apache tribes. Many enlisted men in the regular regiments entered military service unwillingly after having been sentenced to duty for petty crimes, immorality, or wandering as homeless vagabonds. Disease, desertion, and chronic drunkenness were chronic problems.

At the strategic port of Veracruz situated in the tropical lowlands, *vómito negro* (yellow fever) decimated soldiers from the temperate interior highlands who lacked any resistance to mosquito-borne diseases. In 1800–1802, very bad years for yellow fever, the Infantry Regiments of the Crown and New Spain suffered 1,220 disease deaths and 1,558 desertions by terrified soldiers—many of whom having witnessed the horrible deaths of their comrades sold their own uniforms to raise money and deserted. At Veracruz from 1787–1804, the Hospital Militar de San Carlos reported the deaths of 4,681 soldier patients and the Poor Hospital of Montesclaros the deaths of 6,729 patients some of whom were soldiers, army muleteers, and sutlers (suppliers). To replace these heavy losses, army recruiters scoured the jails and the countryside for new blood—often

accepting recruits who were in trouble with the law for petty delinquency or already had been sentenced to lengthy terms of forced labor as *presidarios*. Although in theory the regular army was to have had an active force of about 5,800 troops, in reality these units were seldom popular with potential recruits. To make matters worse, the imperial government transferred the regular army Infantry regiments of México and Puebla to Havana and kept them there for years.

As a direct response to the British conquest and temporary occupation of Havana in 1762 during the Seven Years' War (1756–1763), the Spanish moved to establish a provincial army in New Spain. However, even before the American Revolution broke out in 1775, some metropolitan Spanish military observers opposed the dangerous idea of arming overseas provincials who might seek to sever their ties with the metropolis. Following the loss of Havana, there was no other alternative to establishing some form of regulated military system. In order to inculcate martial values among the Novohispanos, at first the imperial regime rotated main line peninsular infantry regiments for overseas duty in New Spain. However, the remnants of the Spanish Infantry Regiment of Zamora that returned to Europe in the late 1780s were the last of the metropolitan infantry regiments to serve in New Spain until Spanish expeditionary regiments arrived to fight against the Mexican insurgents during the War of Independence (1810–1821).

Some of the officers, NCOs, and soldiers of the Regiment of Zamora remained in New Spain where they assisted in the process of establishing of a more effective and capable provincial army. In 1783, Viceroy Matías de Gálvez commissioned the Interim Sub-Inspector General of the Army and Corregidor of Mexico City, Colonel Francisco Crespo, to study previous failed efforts to establish militias and to draft a Plan Militar designed to prepare the framework, organization, and constitution for a capable provincial army that could handle the complex internal and external defensive requirements of a very large country. A career army officer for over forty years, Crespo had served for thirteen years in different posts including a term as governor of the frontier province of Sonora, during which he led Novohispano forces in campaigns against tenacious indigenous attackers. He concluded that not only was it prohibitively expensive and unpopular to dispatch regiments from the mother country to serve in New Spain, but previous experience illustrated that disease and desertion consumed about two thirds of the European soldiers. A major failing of Crespo as well as for many others at the time was his perception that the *castas* of New Spain—whether mestizos, mulattoes, or other racial mixtures—represented degenerate groups attracted to "drunkenness, lasciviousness, vulgarity, obstinacy, and many other evils." He concluded that these people were even more dangerous than the gypsies of Spain.

Notwithstanding his negative views, Crespo outlined the defensive needs of New Spain proposing an "elite force" of four regular infantry regiments, an enlarged infantry *fijo* (permanently stationed) battalion at the strategic port of Veracruz, and two regular dragoon regiments. In peacetime, the small regular army would number about 5,800 troops at an annual cost estimated at 1,164,000 pesos. In wartime, the total force available could be expanded to about 9,300 troops. In support of the small regular army, Crespo prepared a detailed plan for a regional provincial militia army composed of four infantry regiments based in cities and regions where there was sufficient population, and six infantry battalions in less populated provinces. In Mexico City and Puebla he proposed a battalion composed of *pardos* and *morenos* (mixed race mestizos and mulattoes). Elsewhere, Crespo recommended the establishment of a regiment of provincial grenadiers, a regiment of light infantry, seven mounted provincial cavalry and dragoon

regiments, and a force of mounted lancers at Veracruz. Together, these units added a potential total force of more than 11,000 foot and mounted militiamen, a total that Crespo believed could be expanded to over 16,400 militiamen in a wartime crisis. He added another 6,700 militiamen who were to serve in urban and coastal militia companies and a reserve force of just over 22,200 men enlisted in untrained reserve companies (*compañías sueltas*) that were to provide additional reinforcements. Based upon Crespo's Plan Militar, in theory the army of New Spain could be expanded to 40,000 troops. In 1786, a Royal order approved parts of Crespo's Plan and even proposed to send an undisclosed number of experienced peninsular NCOs and soldiers accompanied by shipments of arms and uniforms to equip the new units. A second Royal order issued in 1787 withdrew the offer of any peninsular soldiers. Indeed, the Spanish imperial government did not dispatch significant numbers of soldiers to New Spain until 1812–1816 to assist the royalist forces in their struggle against the insurgents.

Although the framework for the army of New Spain had been established and approved by the crown, some observers believed that arming and organizing a provincial army of Novohispanos inevitably would pave the way for a future rebellion that Spain might not be able to suppress. This was the view held by Viceroy Juan Vicente de Guemes, 2nd Conde de Revillagiegdo (1789–1794) who feared the negative example and influence of the French Revolution. He doubted the loyalty of the Novohispano population—particularly that of the mixed race *castas* and the Indians. He disbanded the *pardo* and *moreno* (mulatto and black) militias and even more surprisingly decided to set aside Crespo's plan to raise a provincial army. Revillagigedo believed that this approach would grant the Novohispano *criollos* (whites) far too much power and influence. Confident of success, Revillagigedo moved without authorization from Madrid to disband the existing provincial militia units. In the meantime, however, the Captain General of Cuba warned the imperial government that revolutionary French forces threatened Cuba, Florida, and Spanish Louisiana. Based upon this information, in April, 1792, the Minister of War in Madrid authorized the Captain General of Cuba to requisition the Infantry Regiment of New Spain for duty in Cuba—leaving Mexico protected by little more than the Infantry Regiment of the Crown. From the perspective of the Spanish metropolitan military authorities, the precarious situation in Europe, the West Indies, and the Gulf of Mexico required immediate attention while a major attack on New Spain seemed unlikely because France would not be able to mobilize a large overseas invasion force. With three of the four regular Novohispano infantry regiments on duty already in Cuba and Louisiana, Revillagigedo decided to disband the existing militia system of New Spain and he moved to create his own alternative. His objective was to raise regular army regiments that would have strong contingents of European Spanish officers and soldiers. In the military reorganization plan of February 1790 Revillagigedo described militias as absolutely useless, and without awaiting authorization from the crown commenced to disband existing units and to promote his concept for new regular army units that required contingents of soldiers and officers from the Spanish army. His military plan failed to receive any support in Madrid where European events closer to home, such as the impact of the French Revolution, were of far greater concern.

In 1794, France declared war on Spain and dispatched an invasion force through the Pyrenees to occupy the city of San Sebastián. In New Spain, Viceroy Revillagigedo completed his term on July 12 with the arrival in Mexico City of his successor Viceroy Miguel de la Grúa Talamanca, Marqués de Branciforte, a Sicilian by birth. On his trip inland from Veracruz to Mexico City, Branciforte expressed concern that in his opinion

the defenses of New Spain were almost nonexistent. Moreover, fearing attacks by French forces, the Spanish commanders in Louisiana, Florida, Cuba, and other Caribbean jurisdictions clamored for additional funds and troop reinforcements from New Spain. Branciforte recognized that a potentially disastrous defensive situation in New Spain resulted from Revillagigedo's rejection of Crespo's Plan Militar and his failure to obtain authorization from Madrid to implement a new and more costly defense program. Although recently arrived, Branciforte recognized that the key to developing an effective defense system in New Spain lay in establishing close relationships with wealthy creole miners, landowners, and merchants. He observed that the bureaucrats who controlled the urban *cabildos* (city and town councils), were anxious to gain additional social recognition and higher public offices. Before long, he concluded that a provincial militia system could be implemented paid for by private donations of aspirants for commissions. Those who aspired to attain militia commissions received invitations to offer voluntary donations to raise a militia company or squadron, a battalion, or in the cases of the extremely wealthy to underwrite the entire costs of uniforms, arms, and horses for cavalry and dragoon regiments. In 1795, an infantryman cost forty pesos to uniform and equip and a dragoon up to seventy pesos.

In some jurisdictions, many individual donors contributed relatively small sums to rebuild militia battalions or regiments. Elsewhere fabulously wealthy mining and landholding magnet—such as Diego Rul, the Conde de Casa Rul, whose wife was a daughter of the deceased Conde de Valenciana and who was the richest miner in the history of Guanajuato—financed the military units. Branciforte appointed Rul to the colonelcy of the Provincial Infantry Regiment of Michoacán that was one of the provincial units disbanded earlier by Viceroy Revillagigedo. In fact, Colonel Rul did not actually live full time in Valladolid (Morelia). Lieutenant Colonel Juan Joé Martínez Lexarza, who also desired the colonelcy, did live in the city and he pointed out that the royal militia ordinances required a commander to reside close to his command. Rul's enormous wealth and new friendship with Branciforte spoke much louder than a mere regulation concerning residency requirements. However, Rul first donated 4,000 pesos to uniform and equip one hundred men of any provincial infantry regiment. Later, he added 45,000 pesos and followed up with an offer to pay the entire costs if the viceroy agreed to establish an infantry regiment in Valladolid. Although the *ayuntamiento* of Valladolid much preferred the idea of a resident commander, Rul's spectacular funding offer swept away all opposition and won him the highly prestigious position.

Remarkably, in 1800, Martínez Lejarza managed to convince Branciforte's successor, Viceroy Miguel José de Azanza, that as non-resident of Valladolid, Rul had broken the royal ordinances requiring officers to be residents of the community. Rul fought back, pointing out that the colonels of the Provincial Regiments of Celaya, Aguascalientes, Tres Villas, Toluca, and Puebla also lived outside their regimental boundaries. He reminded Azanza that even though his business interests required him to travel constantly, he would serve actively if the viceroy needed to mobilize the Regiment of Valladolid for duty in Mexico City or at wartime cantonments established to resist enemy invasions. Colonel Rul defended his position and he did accept active duty in 1798 with the outbreak of war against Britain. In 1810, at the beginning of the Hidalgo Revolt, insurgent forces captured Rul and freed him when the royalist army was victorious at the Battle of Aculco. He died in 1812 of wounds suffered in combat when José María Morelos and his forces broke out of the royalist army siege at Cuautla Amilpas and escaped.

Although many historians of Mexico, including Lucas Alamán and Carlos María de Bustamante, disagreed on many issues, both described Viceroy Marqués de Branciforte as corrupt to the core and accused him enriching himself massively from the sale of militia commissions. Bustamante stated that there was scarcely a youth from a well-off family in the kingdom who was not eligible to wear the epaulets of an officer. Alamán agreed entirely that the popularity of militia commissions created a veritable goldmine for Branciforte who used Francisco Pérez Soñanes, the Conde de Contramina, as his personal intermediary. However, many of the original documents, including the names and proposed amounts offered by candidate who sought militia commissions, are available today in the section Operaciones de Guerra at the Archivo General de la Nación in Mexico City. If Branciforte operated a private scheme to sell militia commissions for personal profit, it seems unlikely that an extremely wealthy man such as Ignacio Obregón, a part-owner of the Valenciana mine who became the colonel of the Provincial Dragoon Regiment of Nueva Galicia, would have agreed to assume the costs to establish the regiment. When donations from others donors lagged, Obregón paid for the full complement of regimental horses. Branciforte also contributed significantly to the future formation and operations of the royalist army, introducing a system of ten provincial army brigades that, when the Hidalgo Revolt broke out in 1810, provided the royalists with the flexibility needed to combat guerrilla and insurgent warfare. For the future, the appointment of Colonel Félix Calleja del Rey as commander of the Tenth Militia Brigade based at San Luis Potosí was of particular importance. Although he had some faults, Branciforte illustrated a remarkable ability to convince wealthy Novohispanos to take on the prestigious duty of offering large cash contributions to hold military rank and to support the implementation of the provincial army envisioned by Francisco Crespo.

In the decade leading up to the outbreak of the War of Independence in 1810, many of the officers, such as Félix Calleja, developed careers focused upon the persistent threats of an invasion by Great Britain. There was very little concern about the possible danger of an internal conflagration produced by an uprising directed against Spanish rule. Viceroys José Miguel de Azanza, (1798–1800), Félix Berenguer de Marquina (1800–1803), and José de Iturrigaray, (1803–1808) confronted a number of invasion scares. Prior to his assignment to New Spain, Azanza served as Imperial Minister of War and he knew that the port of Veracruz had a mortifying climate and the scourge of *vomito negro* that produced very heavy losses in the garrisons. In 1799, Viceroy Azanza assembled a force of 1,680 soldiers for duty at Veracruz Azanza through a draft of 240 provincial militiamen from each regiment and 120 from the smaller jurisdictions. Some of these men were sent to reinforce the garrison of the port city and to the Castle of San Juan de Ulúa. The remainder troops drafted were to form a cantonment at Arroyo Moreno, situated only two leagues from the port city. The results were absolutely catastrophic as 875 officers and soldiers died of *vómito negro* and 358 panic-stricken troops deserted. In January 1801, of 1,841 soldiers listed in the Veracruz garrison, 1,553 were sick or otherwise unavailable for duty and only 258 were on duty. As might be expected, the Hospital de San Carlos at Veracruz and the interim hospitals established at the cantonment sites inland were primitive, ill-equipped, and lacked stocks of necessary medicines and supplies. Soldiers who suffered the misfortune of falling ill and ended up in hospital at Veracruz knew very well that most likely they would soon be dead. As might be expected, rumors of an outbreak of *vómito negro* were sufficient to provoke panicked soldiers to desert from their posts and to flee from the mortifying climate of Veracruz.

From 1804 forward, British naval vessels and privateers launched attacks Spanish shipping. In 1805, rumors circulated that the British contemplated an invasion of Mexico commanded by Sir Arthur Wellesley, with over 10,000 troops who would carry siege equipment to enable them to attack the fort at Perote and advance on Mexico City. In 1806 new reports arrived that an expeditionary force of 10,000 to 12,000 men had sailed from Falmouth, England to invade Veracruz and possibly Mexico City.

The English threat forced the King's prime minister, Manuel Godoy, now titled the Prince of the Peace, to authorize port closures and to halt most commerce. As the Mexican merchants feared, this draconian solution to the problem produced unemployment, food shortages, and other hardships. Viceroy José de Iturrigaray (1803–1808), faced many problems, especially defense, that were difficult if not impossible to solve. The Infantry Battalion of Veracruz had all but disintegrated, with only four officers remaining who were healthy enough for duty. Nevertheless, Iturrigaray, well aware of the high mortality rate at the port, refused to dispatch additional troops to what he described as a "horrible cemetery." Fortunately, Cuban authorities returned three companies of the Infantry Regiment of Mexico after years of duty there and officers found additional recruits to man the guard posts and the Castle of San Juan de Ulúa. In 1807, Iturrigaray relented and strengthened the Veracruz garrison and organized a new cantonment at Jalapa of more than 15,500 provincial troops. These efforts did not satisfy the merchants of Veracruz, who criticized the viceroy for refusing to commit sufficient effort to defend the port, and they demanded weapons so that they could raise local militia forces.

In May 1808, reports arrived at Veracruz that Napoleon had ordered French troops to attack and occupied Spain. He soon forced the abdication of King Charles IV and reports indicated that Fernando VII had taken the throne. Soon information announced the abdication of the Spanish House of Bourbon in favor of a regent, the Duke of Berg. The French occupation of northern Spain gave rise to new fears in Mexico. Across the colony, the *gachupines* (European Spaniards) feared a creole (Spaniards born in Mexico) conspiracy to grab power. Many in the *gachupín* faction suspected Viceroy Iturrigaray of siding with the creoles and even of committing acts of treason against Spain. From a political perspective, Iturrigaray tried to walk a difficult line that made him many enemies and very few friends. On September 5th, he discussed a plan to resign his office, but before he could act, on September 15th 1808, a pro-Spanish party in Mexico City arrested him and sent him to Spain as a prisoner.

In 1809, crop failures in many provinces drove up the price of maize to heights that caused social unrest that added to disquiet created by the French threat. On July 16, 1809, Archibishop Francisco Javier de Lizana y Beaumont became the Viceroy, but he was equally ineffective—in part because he feared some kind of plot against his government by either the creoles or the *gachupines*.

By the beginning of 1810, Vicereoy Lizana exhibited signs of exhaustion and was unable to respond to the external or internal threats. In April 1810, reports arrived of the fall of Málaga, the entry of the French army into Sevilla, and the siege of Cádiz. News of the French occupation of Andalusia and the collapse of the Junta Central depressed loyal Novohispanos and for some others opened the way to eccentric schemes and more dangerous projects. After the weak efforts of Garibay and Lizana that failed to restore stability to New Spain, the Council of the Regency interim regime at Cádiz appointed Francisco Javier de Venegas, the acclaimed hero of the Battle of Bailén, to become viceroy

and captain general of New Spain. He arrived at Veracruz on August 25, 1810, inspected the army units in the cantonment of Jalapa, and assumed office in Mexico on September 14 only two days before the outbreak of the great insurgency led by Cura Miguel Hidalgo y Costilla.

Although the provincial army of New Spain was successful in putting down minor uprisings, the message of Cura Hidalgo mobilized an almost spontaneous reaction from large segments of the Indian, mestizo, mulatto, and casta population. Although it is difficult even to estimate the numbers involved, the messages of Hidalgo and other insurgent leaders resonated among the rural and village populations and in some regions they responded to the call to arms. The insurgents were highly successful in spreading their message and in recruiting numerous supporters. On the royalist side, the regular and provincial militia regiments were at first incapable of immediate responses. For years, the major task of the military had been to anticipate how to respond to a landing by a British or French expeditionary army. In September 1810, the troops assigned to the garrison of Veracruz and those serving at the cantonment of Jalapa were for a short time distant from the regions disrupted by the contagion. Nevertheless, the messages of Hidalgo and other insurgent leaders soon spread beyond their home provinces and tapped into old grievances and complaints concerning landholding, privileges, distribution of resources, and arbitrary governance by local officials.

Brigadier Félix Calleja, a former protégé of the Conde de Revillagigedo, now commander of the Tenth Militia Brigade based at San Luis Potosí, learned about the uprising on September 19th at 10:30 in the morning. At that moment, he possessed no mobilized military force that he could commit to fight a skirmish let alone a major battle. Shocked by the news, Calleja faced the task of disciplining an army of green militiamen with not one previously well-trained soldier. He assembled the commanders of his militia brigade, gathered the untrained vaqueros from the nearby haciendas, and ordered blacksmiths and carpenters to manufacture lances, machetes, and swords. The muskets available in his brigade were a very old and worn out assortment belonging to the Provincial Dragoon Regiments of San Luis and San Carlos. On September 23, Calleja received a dispatch from the Intendant of Guanajuato, Juan Antonio Riaño, who reported that he was in dire straits, surrounded by insurgent forces and cut off from provisions. Irapuato had fallen the day previously and he knew that the large urban population had begun to waver. Riaño wrote more and more desperate notes until September 28, when he sent one last message stating that he was about to be attacked and would resist as long as he could. Within hours, the insurgents had sacked the granary and killed the intendant and all of the European and creole defenders.

Viceroy Venegas commanded Calleja to mobilize his brigade and to march immediately to Querétaro where he was to join forces with other militia units from Puebla. Horrified by this order, since his dispersed militia forces were not immediately available, Calleja had to defer for weeks until he could mobilize artisans to construct lances for his dragoons and to recruit Indian bowmen. Lacking artillery, Calleja assembled a junta of blacksmiths and other artisans to see if they possessed sufficient skills needed to cast iron and bronze artillery pieces. They claimed that they were capable, but in the end managed to produce only one barrel suitable enough to be mounted on a carriage. The rest of their gun barrels were either too small to cause much damage or more often flawed during the casting process making them dangerous even to test fire. In the meantime, on October 9, 1810, the Marqués del Xaral Berrio, Commander of

Calleja's advanced guard patrols, sighted an enormous insurgent force likely much overestimated at 40,000 to 50,000 men that appeared to be marching toward San Luis Potosí. He described them as moving by roads and through barrancas like a swarm of ants loaded down with booty from their robberies and determined to incite the country to rebellion.

In spite of the apparent strength of the insurgent forces, their major advantage was more an illusion than a reality. While effective as guerrilla fighters, the poorly armed Indian and *casta* soldiers could not withstand the firepower of well organized and disciplined infantrymen trained to fire volleys from smoothbore muskets and backed by charges with fixed bayonets. As the Marqués de Xaral Berrio reported, the insurgents viewed the breakdown of law and order as an opportunity to pillage cities, towns, villages, and haciendas. Even if a few better trained officers and NCOs on the insurgent side attempted to implement military training and proper use of firearms, they needed time and training before they could covert rural *campesinos* into good soldiers. This became evident first in the conventional battlefield confrontations between the insurgents and royalist forces at Aculco, Guanajuato, and Puente de Calderón, in which massed musketry and better discipline among the moderately well-trained militiamen produced royalist victories. When the rebels altered their tactics to construct fortifications on mountain peaks, on islands in lakes such as Mezcala in Laguna de Chapala, or in other isolated situations, they gained some success in the short term. Inevitably and often at high cost in resources and lives, the royalists besieged and attacked these positions or starved out the unfortunate defenders.

In June 1811, Calleja issued a document titled the Reglamento Político Militar that formulated a significant but also a very controversial counterinsurgency program. He recognized that a general fragmented insurgency employing guerrilla warfare would inevitably exhaust the regular and militia units of the royalist army. His clever artifice was to declare a unilateral end to the insurgency. By degrading the insurgent opposition to that of common bandits, thieves, and delinquents, Calleja sought to gain a propaganda victory and equally to demonize the enemy. Backing his program, he introduced a tiered system of defense based upon royalist militias organized in the cities, towns, and rural districts. Some observers criticized Calleja, declaring that it was premature to suggest that the insurgency was at an end—and for making such wild claims that might even stimulate the insurgents to launch gratuitous attacks to prove their capabilities. Calleja responded to his critics by stating that the goal was simply to organize patriot militia companies composed of local men recruited from the cities, towns, and rural districts. The objectives were to isolate and to marginalize the rural-based insurgents, and to strengthen city and town defenses so that the lightly armed insurgents would not dare to attack without artillery. He explained to the district subdelegados that the army could not be present everywhere and that the people of the province must take up arms in their own defense. When this took place, the royalist army commanders would be able to unite some garrisons and to concentrate their forces against the major foci of insurgency. Critics of Calleja's plan complained bitterly about the high costs of funding and that in Veracruz province, for example, most of the arable land belonged to absentee landlords. Most of the landless peasants wanted their own plots of land—using guerrilla warfare as a means to secure their control and to support their contraband trade with the port city.

Beginning in 1816, many historians identify a slowdown in the intensity of the level of combat between the royalists and the insurgents. Lucas Alamán suggested

that the royalist army backed by effective counterinsurgency repression had restored communications and allowed Viceroy Juan Ruiz de Apodaca to amnesty many former insurgents. Except for mopping up operations in mountainous regions of Veracurz, Jalisco, and Michoacán, Alamán declared the insurgency ended. After 1816, there were fewer large insurgent groups operating in the field. If the army could exert sufficient force, the rebels who had families to support accepted royal amnesties, join the provincial militias, or simply return to their previous endeavors. This had not been the situation in 1815 when for months the bands of Veracruz insurgents closed all communications between Jalapa and Veracruz. One convoy languished in Jalapa for over six months. The Consulado of Veracruz reported a "mortal paralysis" of internal and external trade, criticizing the army for its failures and repressive policies. Travelers and merchants paid insurgent taxes levied for permission to move, while the army offered an inefficient and ineffective program of escorted convoys. To show good faith, the imperial government ordered General Pablo Morillo to transfer 4,000 troops from his expeditionary army in Venezuela, which did not arrive. Instead, an expedition under Field Marshal Pascual de Liñán and Brigadier Fernando Miyares y Mancebo about to sail from Cádiz for Peru, received instructions from the minister of war to alter their destination to Veracruz. The ministry placed priority emphasis on maintaining open communications between Veracruz and Mexico City—and in garrisoning a defended "camino militar" with sufficient troops to repel the insurgents. Even so, this pressure from the imperial army leadership produced only temporary deterrence. In 1818, the Veracruz insurgents that had been dispersed once again coalesced to apply their own system of special tolls. This time Viceroy Venadito (Apodaca) dispatched Field Marshall Liñan to asume the governorship of Veracruz Province with orders to establish fortified villages, amnesty rebels, and to crush recalcitrant insurgent bands.

Brigadier Domingo Luaces, commander of the 2nd battalion of the Infantry Regiment of Zaragoza, stationed at Querétaro in 1818, reported that notwithstanding years of counterinsurgency bands of 200 to 300 insurgents attacked the rural haciendas of the province almost daily. Their pressure intimidated and exhausted the local militia companies. Luaces described a growing state of exhaustion within his own command caused by constant patrols and pursuits of insurgent bands. He complained that his infantrymen had been given too many missions and that he needed a dragoon regiment to deploy flying detachments that might be able to recover some of the more isolated haciendas from rebel control. Luaces reported that his overburdened soldiers expressed feelings of hopelessness and anger that made them listless, demoralized, and amenable to desertion. In August 1818, the royal treasury owed his regiment 14,000 pesos in back payments that had not been made available. In some cases, officers borrowed money themselves in order to assist their men with the purchase of their daily provisions. Uniforms, shoes, and equipment had deteriorated to the point that some officers reported that their men were almost naked and embarrassed to appear in public. Similar conditions prevailed in many garrisons and offered arguments to accept the proposal of Agustín de Iturbide to end the war with the Plan de Iguala and the concepts of 'Independence,' 'Religion,' and 'Union.'

Many officers who served in the Mexican army or on the insurgent side in the period after Independence up to the Mexican American War were veterans who began their military careers in the years between 1810 and 1821. Seven former insurgents—Guadalupe Victoria, Nicolás Bravo, Vicente Guerrero, José María Tornel y

Mendivil, Manuel Rincón, Juan Álvaraz, and Melchor Muzquiz —achieved the senior rank of division general, and four others became brigade generals. Many more Mexican generals of the post-Independence epoch were creoles, though some were *peninsulares* who had been transferred from Spain before 1810 or arrived with their expeditionary regiments between 1812 and 1817. Well after Mexican Independence, many royalists continued to think of the insurgents as potentially dangerous savages—of low class origins and given to vandalism, drunkenness, and cruelty. Few well off or wealthy Mexican creole families of royalist origins wanted their sons and daughters to have anything to do with such barbarous and uncivilized persons. Indeed, the families of the old royalists and the old insurgents inhabited quite different solitudes.

Although it is difficult to follow the lives of the European Spanish officers in New Spain, many of them maintained contact with each other, exchanged information, and until 1821 expressed keen interest in promotions within the metropolitan Spanish army. In an era during which patronage relationships were all important there were many bitter rivalries and enmities between officers concerning advancement. Senior commanders looked after their favorite subordinates and developed circles of friendship and assistance. For example, the Captain General and Governor of Nueva Galicia, José de la Cruz maintained close ties with his subordinates such as Pedro Celestino Negrete, a *peninsular*, and Luis Quintanar, a creole. Both Negrete and Quintanar became powerful counterinsurgency commanders and later played important roles in regional and district administration. After 1821, both officers achieved high rank and position in the Mexican army and were influential in political life.

As might be expected, after 1821 the *gachupín* officers who severed their relations with their mother country and interrupted their military careers almost immediately found themselves central figures in a campaign to expel them from Mexico. The basis for this effort reflected creole resentments and memories of the vengeful cruelties of the royalist counterinsurgency campaigns. For many Mexicans, Iturbide and other military figures represented brutal repression, the destruction of the economy, and irreparable damage to society. There was a movement to expel the "*capitulados*" (the Spanish soldiers who surrendered) and even to remove those *gachupines* who supported the Plan de Iguala. After a decade of suffering, many Mexicans wanted particularly to expel any *gachupín* who had played a role in the counterinsurgency programs. The assassination of Colonel Manuel de Concha, who was one of the most brutal and efficient royalist counterinsurgency commanders, convinced some of his former colleagues that they should abandon Mexico while they could. Concha had received many threats and was murdered in Jalapa on his way to Veracruz to board a ship for Spain. Agustín de Iturbide, who for a short time managed to become the first emperor of Mexico, died before a firing squad in 1824 at the village of Padilla near Veracruz. For a long while, Mexico's destructive War of Independence left the economy damaged and society disrupted. After 1821, the new nation needed time to rebuild and to restore itself. Instead, leaders such as Antonio López de Santa Anna, and other generals who had developed their careers as royalist counterinsurgency commanders and in some cases fought on the insurgent side, seized control of the nation. Preoccupied by internal divisions and incapable of defending themselves against a much more powerful northern neighbor, the generals were poor stewards of their nation and of its population.

Senior Spanish Officers who abandoned Spain and the Spanish Army in 1821 to serve Mexico.

Domingo Estanislao Luaces, Coronel de Infantería de Zaragoza

Manuel Torres Valdivia, antiguo Comandante en San Luis Potosí

Brigadier Pedro Celestino Negrete

Melchor Álvarez, Coronel de la Infantería de la Reyna

Joaquín de Arredondo, Comandante General, Provincias Internas de Oriente

Rafael Bracho, Coronel de Infantería de Zamora

Manuel Obeso, Teniente Coronel de la Infantería de la Reyna

Gregorio Arana, Comandante de la Infantería de Mallorca

Froilán Bocinos, Teniente Coronel de la Infantería de Zaragoza

Pedro San Julián, Teniente Coronel de la Infantería de Zaragoza

Source: Ministerio de Guerra, Primera División, Secretaría del Despacho, 1822, Archivo General Militar de Segovia, España, Sección de Ultramar, legajo 227.

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The U.S. Intervention in Mexico, 1846–1848

LINDA ARNOLD

The War

Reports and stories about soldiers and the battles between Mexicans and Americans during the 1846–1848 war abound in newspapers, official military reports, and books and articles. Political histories of the period also detail the international, national, and local issues faced by elected leaders. Jack Bauer, John S. D. Eisenhower, and William DePalo, Jr. have produced excellent studies of the U.S. and Mexican military history of the period. Mexican scholars under the direction of Josefina Zoraida Vázquez and Laura Herrera Serna have integrated local and national military and political history into notable contributions to the literature by examining the responses to war in every region of Mexico. Most recently, Ira W. Levinson has analyzed the extent and significance of the understudied guerrilla war carried out against U.S. forces. Nevertheless, social historians have ignored those years and have yet to analyze the daily lives of civilians and soldiers during that war. Snippets of the social histories of civilians and soldiers surrounded by war and foreign occupation, while still coping with the normal adversities of life, can be gleaned from newspaper reports. Simple civil suits filed offer other glimpses into the persisting mundane conflicts of daily life. Still other accounts offer perspectives on the consequences of war for those who had to cope with undisciplined forces, lawlessness, and the insecurities of life in a country at war.

Even before U.S. troops began to engage in skirmishes and battles, newspaper accounts suggested that military occupation of Mexico would not advantage either soldiers or ordinary citizens. A report in the *Niles National Register* about camp life around Corpus Christi in late 1845 noted that "… the place is crowded with outlaws, thieves, and murderers, who daily commit robbery and murder with impunity; that over thirty grogshops have been opened by the vultures who follow the army to prey on the poor soldiers; that two men, one belonging to the 4th and the other to the 2d artillery, were recently murdered and other have been drugged and robbed.…"[1] Undisciplined foreign troops and lawlessness would plague not only American soldiers and stragglers, but Mexican soldiers and civilian as well. Even before war broke out Mexican officers stationed near the

American forces warned U.S. officers that, "… every thicket was infested with banditti who would kill a man for 50 cents or his blanket."

Discipline problems among the troops, the "vultures who follow the army," and banditry would follow the American forces and endanger the lives of ordinary Mexican citizens for years to come. Shortly after the initial battles of the war, when the American forces took up station in Matamoros, a correspondent for the *New Orleans Bee* reported, "A Spaniard or Mexican was found dead in his house this morning early, and his wife came to Taylor's quarters, complained of the deed and pointed out the murderer. He was promptly arrested and placed under guard for trial." Even when U.S. commanders occasionally took steps to hold soldiers accountable for their actions, the problems created by the "vultures" persisted.

After war broke out conditions in Corpus Christi did not change, as noted by one soldier's comments in early June 1846:

> "On the first landing of the 3rd and 4th infantry at Corpus Christi, 'Kinney's Rancho', though a lawless, smuggling town, under the vigorous sway of its martial proprietor, was as quiet and peaceful as a village in New England. But every fresh arrival of troops was followed by some portion of that vast horde of liquor selling harpies, that are ever to be found in the train of all armies, ready to prey upon the simple and unsuspecting among the soldiers. In a short time, hundreds of temporary structures were erected on the outskirts of the 'Rancho,' and in them, all the cut-throats, thieves, and murderers of the United States and Texas, seemed to have congregated."

Civilians would have to cope with more than the occasional undisciplined solder, "vultures," and "liquor selling harpies." A letter from the front in the *Charleston Mercury* reflected on the depredations inflicted on civilians by forces under General Zachary Taylor's command in the vicinity of Monterey.

> "As at Matamoras, murder, robbery, and rape were committed in the broad light of day, and as if desirous to signalize themselves at Monterey by some new act of atrocity, they burned many of the thatched huts of the poor peasants. It is thought that one hundred of the inhabitants were murdered in cold blood, and one Mexican soldier, with Gen. Worth's passport in his pocket, was shot dead at noon-day in the main street of the city by a ruffian from Texas … Guards of 'mercenaries' are now placed in every street and over every valuable building in the city to prevent depredations being committed by those who came here from devotion to 'the land of the free and the home of the brave.'"

The following spring the lack of discipline among the Taylor's volunteer forces led another witness to reflect on the tragedies for civilians following a slaughter of civilians by a group of Arkansas Volunteers near Monterey:

> "An old female, who looked as though she might be the grandmother of the whole, advanced to us, and, in the most imploring manner, asked us to send back her husband and sons from the camp, where they supposed they feared their men had been killed. They soon comprehended my fears, and the old woman asked us to lead to the dead bodies; and accompanied by two little boys of about 10 years of age each, we set out for the scene of murder."

> "The first body we approached, the old woman exclaimed a 'caratero' – a donde estan los otros, madre de Dios, adonde iremos? –Where are the others? –Mother of God! Where shall we go?' We then led them to another body … The little boy … was the first to reach the

body. He advanced steadily to its side; gazed upon the countenance which was half concreted beneath the broad-brimmed sombrero; folded his hands upon his breast, and looked with dreaming earnestness upon the bloody victim of ill-timed vengeance. The heaving of his manly little chest, and the silent tears stealing from his dark eyes and rolling their scorching way down his cheeks, told too eloquently that the little fellow had lost a friend. I said to him, in the most soothing tone I could command: 'Do you know that man?' To which he replied: 'Es mi padre caballero. (He is my father, sir) – walked round the body, examined the bullet hole in the side, turned away from us, drew his sleeve across his eyes, and, without an audible sob or murmur returned to the glen where his mother, brothers and sisters were to hear the tale of their desolation.'"

Undisciplined foreign forces continued to pose a threat to ordinary folks until officers in charge of occupation forces took serious steps to impose their authority locally as well as over their own soldiers. When Brigadier General James Shields took command of the American forces at Tampico in late 1846, his December 22 Order No. 3 prohibited gambling:

"I. All persons occupying houses in Tampico or in its vicinity are hereby strictly prohibited from allowing any species of public gambling within the same.

II. All houses or other places kept for the purpose of public gambling will be closed, the persons found gambling in them arrested, those attached to the Army punished, and those who are not, banished.

III. All personal property found in any house or place kept for gambling, and all money or property employed in gambling will be confiscated, and the proceeds thereof appropriated as a hospital fund for the relief of the poor and indigent in Tampico."

After Colonel William G. Belknap, in the spring of 1847, took command at Cerralvo on the road between Matamoros and Monterey, an area of significant guerrilla and bandit activity, a correspondent for the *New Orleans Picayune* reported, "He has put his veto upon all grog-shops and gambling establishments since his arrival here, and in consequence everything is very quiet and peaceable. He is this day starting for, Matamoros, for the purpose of regulating affairs in that place also." General Winfield Scott promised the citizenry of Mexico City that he would not tolerate such violence among his troops. Under his command a court martial panel convicted Private John Reynolds of the rape of a Mexican woman and sentenced him to death, a sentence Scott ordered carried out in late 1847. Colonel John W. Tibbatts, who became the civil and military governor in Monterey in the fall of 1847, issued a proclamation, noting that the city was "… virtually without law or order, and infested with robbers, murderers, gamblers, vagrants, and other evil disposed persons – the worst of criminals going free, unscathed of justice … insomuch that the peaceable inhabitants thereof have no protection, either of person or property." As reported in various newspapers, he promised the local citizenry to make "a clean sweep of the gamblers, hells, drinking shops, and rowdies" and invited those "compelled to flee from their homes through fear or other cause to return, with the assurance that they will be protected in all their honest avocations."

Undisciplined occupation forces were not the only cause for concern among civilians; the hardships of war, urban fighting, and artillery bombardments directly affected women and children as well. Following the battle for Monterey in September 1846, witnesses noted the presence of the wives and children among the evacuating Mexican troops. One

wrote, "The army was accompanied by a great many females; officers wives on horse-back, their faces muffled, and with hats on; soldiers' wives mounted on donkeys or on foot, some of them carrying burdens that I would scarcely think of packing upon mules; young women with short petticoats, and hats, tripping lightly along; young girls trudging along with their little valuables in their arms." Months later, as U.S. forces prepared to take Veracruz, reports noted the efforts of women and children in preparing defenses in Veracruz: "Everything indicates a movement upon Vera Cruz, which place, so far from being abandoned by the Mexicans, appears to be making efforts for defense. Men, women and children are said to be laboring on the works for defense, making ditches, removing sand banks, &c." Many of those women and children would become casualties of war.

Concerned for their own people as well as the women and children of Veracruz, the British consul in Veracruz along with his colleagues from France, Spain, and Prussia wrote to General Winfield Scott on March 24, 1847, requesting he suspend the bombardment, "sufficient to enable their respective compatriots to leave the place with their women and children, as well as the Mexican women and children." Scott refused and the bombardment killed and wounded soldiers and civilians alike. Subsequently, the presence of wounded and dying women and children in Veracruz led the correspondent of the *New Orleans Delta* to write, "The Mexicans variously estimate their loss at from 500 to 1,000 killed and wounded, but all agree that the loss among the soldiery is comparatively small and destruction among the women and children is very great."

One American who witnessed the effects of the bombardment of Veracruz in April 1847 wrote:

> "Never had I beheld such a destruction of property. Scarcely a house did I pass that did not show some great rent made by the bursting of our bomb shells. At almost every house at which I passed to examine the destruction occasioned by these dreadful messengers of death, some one of the family (if the house did not happen to be deserted) would come to the door and, inviting me to enter, point out her property destroyed, and, with pitiful sigh exclaim 'La bomba! La bomba!'"

As he continued to explore the ravages of war among the civilian population, he visited a hospital.

> "Here lay upon truckle beds the mangled creatures who had been wounded during the bombardment. In one corner was a poor decrepit, bed ridden woman, her head white with the sorrows of seventy years. One of her withered arms had been blow off by a fragment of a shell. In another place might be seen mangle creatures of both sexes, bruised and disfigured by the falling of the houses, and bursting of the shells. On the stone floor lay a little child in a complete state of nudity, with one of its poor legs cut off just above the knee! The apartment has filled with flies, that seemed to delight in the agonies of the miserable creatures over which they hovered and the moans were heart-rendering.

> I went about from cot to cot, and attempted to console with the suffers, by whom I was invariably greeted with a kind smile. Not even this abode of wretchedness had been exempt from the accursed scourge of war. A bomb had descended through the roof, and after landing on the floor, exploded, sending some twenty already mangled wretches to the 'sleep that knows no waking.'"

The war in central Mexico would become an even deadlier affair for troops and civilians alike.

Daily Life During the War

Just because war proved as deadly for civilians as for soldiers, remarkably, living with the imminent threat of battle did not interrupt the ordinary trials and tribulations of daily life for many. Following the bombardment of Veracruz, the defeat of the Mexican forces at Cerro Gordo, and the occupation of Puebla, all knew that conflict would eventually engulf the valley of Mexico and Mexico City. Mexico City boasted beautiful churches and exquisite mansions along with tenement apartments and a dense population. In their midst city leaders, the city councilmen, played a critical role in the daily lives of people because they mediated and adjudicated ordinary complaints and simple civil suits. This had become one of their main roles in the life of the city. As battles and skirmishes loomed large, civilians sought out their city councilmen to resolve their mundane conflicts.

City councilman Manuel Reyes Veramendi in particular had become quite well known among the people of the city for his fairness in handling disputes. He had heard his first small claims cases between January and May 1827. Years later he would become one of the very few men who would serve on the city council multiple times. His election in 1842 and re-election to the city council in 1845, 1846, and 1847 attested to the confidence the people had in him. Reyes Veramendi served them well; Reyes Veramendi persisted in listening to complaints and resolving innumerable small claims cases.

Reyes Veramendi listened on April 10 when Romana Roldan, a landlady, complained that she had been verbally insulted and maligned by Antonio Bocanegra and his wife. Bocanegra made the same complaint against Roldan. Both plaintiff and defendant then engaged in a heated exchange. As a mediator, Reyes Veramendi managed to get both parties to agree that they had been verbally abusive and managed to get both parties to forgive one another. He then cautioned them that any failure on Roldan, her children, Bocanegra, his wife, and their children's part to get along harmoniously would lead him to fining all parties. Mediating such disputes was just one Reyes Veramendi's responsibilities; more common was the task of mediating and adjudicating cases between landlords and renters over nonpayment of rent.

Nonpayment of rent represented the most common and frequent cases city councilmen heard. Established jurisprudence held that property owners had an absolute right to evict anyone after three months of nonpayment of rent. Property owners and administrators normally just wanted some arrangement made for paying back rent. For example, Guadalupe García, representing his father Miguel García, and Agustin Carrión, representing Luisa Ramos, appeared before Reyes Veramendi on April 12. As the plaintiff, García requested that Reyes Veramendi order Ramos to pay 60 pesos for three months back rent for a storefront that Ramos should have paid by April 1. Carrión, arguing that Ramos did not have 60 pesos, offered instead that she pay 3 *reales* daily and should she neglect to do so agreed to her eviction. García accepted that offer. Rent cases not only involved an individual who failed to pay his or her rent, but the co-signers who had offered to guarantee payment as well. One such case that same day involved a co-signer who had failed to appear after two summons to do so. Reyes Veramendi issued an order requiring the co-signer to pay the 32 pesos due the plaintiff within three days. The consequences for disobeying such an order could involve confiscation of personal property that would be sold at public auction until the amount of the debt and all associated court costs were covered.

While most rent cases involved individuals who owned and rented urban properties, they were not the only plaintiffs. In Mexico City a significant number of urban properties were owned by different ecclesiastical institutions that relied on the income from rents to support their priestly duties and worldly needs. Already faced with forced loans to the government, the ecclesiastical institutions would pursue those who failed or neglected to pay their rents. Fr. Atanacio Ramírez, the legal representative for the San Agustin monastery, a major property owner in Mexico City, claimed on April 10 that José María Ramírez should have paid 60 pesos in back rent by March 20. Short of cash, Ramírez offered to pay 10 pesos over each of the ensuing months and two pesos in interest and then 50 pesos with 3 pesos in interest after that. He also promised to pay his rent promptly and offered a co-signer who would guarantee his promise. The priest accepted those terms. Folks who co-signed also left themselves liable for unpaid commitments; if the co-signer also neglected to fulfill his obligations, the responsibility still fell on the renter. Mariano Malpica, the rent collector for properties that funded chaplaincies, on April 14 told Reyes Veramendi that Justo Villarreal, who had co-signed to pay rent for Manuel Flores, owed 16 pesos, 4 *reales*. Villarreal recognized the debt, offered to pay within one month and stated that he would continue to guarantee Flores's rent. Malpica accepted Villarreal's word. Not all cases ended so amicably. Jose María Sandoval, who represented the Convent of Santa Clara, requested Reyes Veramendi on April 15 order Trinidad Cerón to pay the 14 pesos that his co-signer had not paid. Short of cash and with several sick people under his care, Cerón offered to pay in bits and pieces, an offer Sandoval rejected; nevertheless, Reyes Veramendi ordered Cerón to pay forthwith. Sandoval was back in Reyes Veramendi's office on April 19 with three rent cases in hand. In the first he wanted Nicolas Ortiz pay 24 pesos, 6 *reales* in back rent. They eventually came to an agreement. In the second he wanted Luisa Ochoa's co-signer, Rafael Ruiz, to pay 11 pesos, 2 and a half *reales* for the room Ochoa rented. Ruiz recognized his responsibility and agreed to pay Sandoval on April 24, an offer Sandoval accepted. The third case involved Cerón again, who still had not paid his 14 peso debt; Reyes Veramendi once again ordered Cerón to pay, which apparently he did as no further case involving Cerón appeared in the councilman's notes. Sandoval persisted in pursuing nonpaying renters that month. He and José María González came to an agreement on April 21 over 21 pesos after José María Garrón, who had co-signed for González's rent, refused to pay the 21 pesos. González offered to pay Sandoval 7 pesos on the spot, 7 more in one week and the remainder due in two weeks. Sandoval agreed to accept González's offer. Sandoval and the other legal representatives of ecclesiastical institutions would remain vigilant in their responsibilities. If not, small amounts of unpaid rent would grow into larger and larger amounts and threaten the sustainability of the institutions for which they worked.

A second common thread in small claims cases involved horses and mules. Alejandro Cerda told Reyes Veramendi on April 8, 1847, that Miguel Múñoz owed 11 pesos for the sale of a horse. Múñoz confessed the debt and promised to pay by the end of the month. Later that day Br. Manuel Hernández Montenegro accused Mauro Medina, represented by his father Lic. Francisco Granados, of having stolen one of his horses while taking two others for veterinary cures. Granados denied the accusation, arguing that one of Hernández Montenegro's servants had told Medina when he arrived that one of the priest's horses had been stolen. Reyes Veramendi, after investigating the competing claims, found against the plaintiff, but let him know that should he identify the party who stole his horse that he still could pursue judicial recourse. Later that month

José María Valenzuela requested the councilman to order Mariano Larrasolo to return a horse that had been stolen from Valenzuela and was now in Larrasolo's possession. Larrasolo's representative, Lic. Joaquín Madero, claimed that Larrasolo had legally purchased the horse. Mediating the dispute, Reyes Veramendi determined that the horse had not been stolen, but that Larrasolo's had it in legal custody for a debt Valenzuela still owed Larrasola. Both parties agreed that Valenzuela would pay Larrasolo 60 pesos for his debt and half the cost of the feed he had spent on taking care of the horse. Juan Macías and Espiridión Gasca on April 21 haggled over 60 pesos in freight charges for a team of eight mules that Gasca had brought from Guanajuato. Unable to mediate a settlement, Reyes Veramendi ordered Gasca to pay the 60 pesos. Shortly, Ramon Cordero also insisted that Gasca pay the freight charges for ten other mules; once again Gasca had to pay the freight charges.

Such daily encounters between city residents did not abate just because war loomed over the city. As American forces moved into the valley of Mexico, Dolores Gallardo brought her claim for 14 pesos in back rent against Ángel Castañeda to Reyes Veramendi on July 21, 1847. Ángel agreed to pay the debt over the next several weeks. Two days later José Miranda and Roman Carranza came to settle their dispute over 33 pesos, 6 *reales* for a saddle that Carranza had agreed to repair. Carranza offered a series of excuses for his failure to repair the saddle. Reyes Veramendi listened then ordered Carranza to repay the money and return the saddle immediately. Leandra Rangel, on July 24, complained that Jose Ocampo had embargoed her furniture. Ocampo explained that he hadn't embargoed the furniture; he just had not permitted her to remove it from the room she had been renting when she tried to move out because she still owed him 9 pesos and half a *real* in back rent. Mediating the dispute, Reyes Veramendi ordered Ocampo to permit Rangel to recover her property, ordered her leave his property within four days, and told Ocampo that he still had the right to pursue the debt should Rangel not pay him the rent she owed him. Before the end of July Reyes Veramendi mediated and adjudicated twenty-six other small claim cases. Nonpayment of rent, unfulfilled contracts, verbal assaults, and unpaid debt complaints filled the pages of his formal notes.

City councilmen mediated complaints and adjudicated small claims cases that continued throughout August and into September, even after the initial battles in the valley. Reyes Veramendi handled cases daily before the first major battles in late August 1847. Only after he became seriously occupied in last minute preparations to defend Mexico City did he delay his cases. Máxima Cenisero and Francisco Parte Arroyo on September 11, 1847, appeared before him to settle a dispute over several chairs. Several months earlier Cenisero had paid Parte Arroyo 8 pesos, 4 *reales* to paint the chairs but he had yet to return them. During the mediation Parte Arroyo agreed to return the chairs and repay Cenisero in four or five days and to provide a co-signer for his debt. Cenisero agreed to accept Parte Arroyo's offer.

Only when cannon balls and gun fire broke out in the immediate environs of the city and for two weeks thereafter did ordinary citizens find their access to dispute resolution briefly disrupted. In no small part that access was disrupted by those very citizens because they actively resisted foreign occupation of their city. As newspaper reports noted, U.S. forces on September 14 and 15 faced significant popular resistance.

"The division of Gen. Twiggs in one part of the city, and Gen. Worth in another, were soon actively engaged in putting down the insurrection. Orders were given to shoot every man in

all the houses from which the firing came, while the guns of the different light batteries swept the streets in all directions… Many innocent persons have doubtless been killed during the day, but this could not be avoided. Had orders been given at the outset to blow up and demolish every house or church from which one man was fired upon, the disturbances would have been at once quelled."

Resistance to foreign occupation persisted for those several days until Manuel Reyes Veramendi and other city council members called on the populace to halt their resistance. The people responded and ceased to resist foreign occupation of their city. They granted legitimacy to the voices of their city leaders, councilmen, who for decades had interacted with them daily, mediating their disputes and adjudicating their small claims cases.

U.S. troops occupied Mexico City and Reyes Veramendi took on responsibilities as the Mexican government's interim governor of the Federal, councilman José María Bonilla took over Reyes Veramendi's responsibilities for mediating and adjudicating small claims cases. Bonilla listened on September 25 when Ángel Arnero and Luis Forte wrangled over 64 pesos that Ángel insisted Luis owed him for renting three horses and for the salaries of two servants over an eight day period. Luis argued that he didn't owe 64 pesos because he had only rented the horses to go on a short trip, not for returning from that trip. Bonilla didn't decide that dispute immediately, but opted as the law permitted to think about it for four days. After consulting with an attorney, Bonilla ordered Luis to pay for the rent of the horses and the salaries of the servants for eight days at the cost of 2 pesos per day. That same day Manuela Mondragon insisted that Joaquin Alvarado return a saddled horse that she had contracted him to bring to Mexico City. Joaquin, with an excuse that would be repeated by others, claimed that the horse had been stolen. As with others who would make similar claims, Joaquin still had to pay for the horse and agreed to do so. Councilmen continued to mediate and adjudicate small claims cases during the ensuing nine months that foreign troops occupied the city.

Beyond the confines of the city, daily life across the Mexican countryside varied greatly. For those well removed from garrisons, guerrilla raids, bandits, and army patrols, rural life remained normal. Agrarian villages in remote valleys and on lofty mountains would scarcely be aware of the insecurities fathers, mothers, brothers, and sisters coped with as they tried to maintain the normal routines of daily life. For those in occupied cities whose daily lives left them trapped in the throes of the struggle, daily life could be quite precarious. The consequences of "vultures," undisciplined troops in both armies, deserters, guerrillas, bandits, and the absence of civilian policing the rural countryside would continue to plague the populous.

The capital city's council recognized that law and order was a serious problem both in and around the Federal District. The council proposed a rural police force for the Federal District in early 1848. Despite efforts to contain lawlessness, a correspondent for the New Orleans *Bulletin* in late May noted that the problems continued:

"The robberies and murders that were prevailing in the neighborhood of the City are transferred within the walls, and house breaking and robbing individuals in the streets are by no means uncommon.

A few nights ago, a most horrible murder was committed by a band of desperadoes, who attempted to rob a wealthy mercantile house, in one of the most populous streets of our city.

Seven or eight of the gang have been apprehended.—Several Volunteer officers have been implicated, and a deep gloom and mortification hangs round the heart of every lover of his country, at the disgrace of the American flag."

Those problems remained long after the American forces withdrew from city.

After the return of federal officials to the Federal District in early June 1848, Governor Juan María Flores ordered that the auxiliary police forces make daily and nightly rounds to conserve order in the city. He also ordered all *pulquerías*, bars, and other establishments that sold alcoholic beverages closed at 5 PM until further orders and prohibited all but those authorized by the government to carry arms. In a further effort to re-establish law and order, the federal president ordered that each city block elect a policing official who would have immediate jurisdiction over those accused of stealing, murdering, or wounding anyone.

City councilmen had not been alone in mediating and adjudicating small claims cases. Commandants general heard similar cases. Active duty soldiers, members of their immediate families, their domestic servants, and a wide range of civilians, such as retired military personnel and special police units, fell under military jurisdiction. Known as a *fuero*, or special jurisdiction, the jurisdiction of military commandants general extended well beyond the jurisdictions of city councilmen to include major civil suits, egregious criminal cases, and matters of military law. In small claims cases, though, military jurisdiction paralleled the jurisdiction exercised by city councilmen. Because traditional, similarly to modern, jurisprudence held that a plaintiff must sue a defendant in the defendant's jurisdiction, the senior military commander in Mexico City dealt with the same matters that city councilmen dealt, albeit not on a daily basis.

Through the spring and into the summer of 1847 the Mexico City commandant general listened to rent cases. On May 4 1847, Francisco Paloma and Lieutenant Julian Washington listened as the commandant ordered Washington to pay his back rent within three days or face eviction and accompanying court costs. That same day the commandant ordered Lieutenant Francisco Utrillas to move out of his abode for nonpayment of rent and to deliver the keys to the commandant's office the following morning. Lieutenant Colonel Marcelo Álvarez faced more than just a rent problem; a series of creditors had brought their complaints to the commandant's office. The commandant on May 11 ordered one third of the officer's salary paid to the creditors, until they had received the monies due them. Before the end of the month the commandant ordered half of Colonel Ignacio Francisco Valdivia's salary be paid to his wife, whom he had abandoned. The commandant ordered Manuel Lombardini to pay Carlos Susan 58 pesos in back rent on June 19. Miguel Humana was ordered to pay 7 pesos, 4 *reales* he owed to Ignacio Sepulveda, an attorney, for the work he had done on an estate case.

The battles in the valley of Mexico and the ensuing Mexican army's retreat from Mexico City did create problems for soldiers with legitimate small claims cases. Most soldiers would have to wait a year or more before settling their disputes. Jesús Dias, an army captain, had a legitimate small claims case. Skirmishes had intensified south of San Ángel on August 18, 1847, foreshadowing the battle of Padierna, or Contreras as the American named it. Early the following morning, Captain Dias asked the son of another captain to take his horse into the city. The youngster left the area with the horse, heading through San Angel on the only road toward Mexico City, a road that led him past the village of Tacubaya. Arriving near the village, Enrique Grimaret, a retired army officer

who owned a small estate just outside the village, ordered the lad to leave the horse at his ranch. Along with other residents, Grimaret just tried to rise to the challenges of the day, looking after wounded as they dragged themselves from the battlefield, directing dispersed troops toward Chapultepec, and protecting the interests of the troops in battle. Upon seeing a youngster with a fine saddled steed, suspecting he had stolen it from an officer wounded or killed in battle, Grimaret insisted the youth leave the horse for safe keeping. Grimaret's ranch hands placed the horse in a corral.

Just after dawn broke on the morning of August 20, U.S. artillery decimated the Mexican forces at Padierna. Dispersed but still ready to engage in battle, Jesús Dias wanted his horse back. Returning to the city, the youngster told him that Grimaret had forced him to leave the horse in Tacubaya. Dias then found his way to Grimaret's estate and demanded the return of his horse. Unfortunately, Grimaret no longer had the horse. He told Dias that one Capitan Agustín Ordaz of the Mexico City security police had stolen it late the previous day. After evacuating Mexico City the night of September 13, Dias made his way to Toluca, where the federal government initially reorganized itself. There, Dias found and confronted Ordaz. Ordaz claimed he had left the horse stabled with an artillery unit near Chapultepec and that the Americans likely had it. Dias remained without further recourse for months to come.

After U.S. troops withdrew from the valley of Mexico in June 1848, Dias returned to Grimaret's ranch to request the return of the saddle and bridle of his long lost horse. Grimaret told him, though, that the saddle and bridle had remained on the horse when Ordaz had stolen it. Equally outraged, Grimaret cooperated with Dias as he sought recourse. First, they asked Ordaz to pay for the horse, saddle, and bridle; Ordaz refused, denying any responsibility. Consequently, Dias filed a small claims case against Ordaz, who has a member of the secret police fell under the jurisdiction of the commandant general. Together with Grimaret and his ranch hands as witnesses, all of whom specifically recalled that Ordaz with pistol pointed had taken the horse Grimaret had intended to protect for its owner, Dias took his case to the commandant general.

Given the abundance of testimony against Ordaz as the person responsible for the theft of the horse, commandant general Benito Quijano found Ordaz personally liable for the horse, saddle, and bridle. Ordaz, though, did not comply with Quijano's order for payment of the value of the property. Consequently, Dias once again took his case to the commandant general who, on November 4, 1848, ordered the embargo and auction of Ordaz's possessions. When the commandant's notary informed Ordaz of the commandant's decision, and faced with the loss of his own property, Ordaz finally gave Dias a horse, saddle, and bridle of equal value to those he had taken from Grimaret's ranch.

Civilians and soldiers had experienced inconvenient delays in resolving normal conflicts; they would quickly resume resolving those disputes, though. They would also for months and years to come live with the consequences war. A report to the *The Times* of London dated December 12, 1848, noted: "Robberies upon the highways and in the streets are frequent …." Law and order would prove much more difficult to re-establish than peaceful dispute resolution. Local and federal officials would experiment with a variety of solutions to urban as well as rural lawlessness as thieves, bandits, and murderers continued to prey on people whose daily lives had been disrupted by war and would continue over the ensuing two decades to be disrupted by civil war and another foreign occupation. There would be no easy solutions to the re-establishment of personal security.

Note

1   *Niles National Register*, January 3 1846, Letter from an officer at Corpus Christi. All of the newspaper articles referenced may be accessed online at http://www.history.vt.edu/ MexAmWar/INDEX.htm.[Accessed Nov 2010]

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Republicans and Monarchists, 1848–1867

ERIKA PANI

Desperately Seeking a State

In 1848, alarm bells sounded for many Mexican politicians. The "crisis of conscience" spawned by defeat to the United States invaders (Hale) gave new urgency to the task of setting up a government strong enough to counter foreign threats and ensure domestic stability. In the next ten years, the complex, porous and flexible spectrum of politics would harden into two opposing camps. From 1858 to the end of 1860, Conservatives and Liberals would face off in the country's longest and bloodiest civil war since independence. The former called for the strengthening of public authority by streamlining the national government's administrative machinery, so that it could protect civil liberties and promote economic growth. Deeply concerned with what they saw as the dissolution of the hierarchies that highly structured society, most Conservatives thought that principles of Liberal politics, like popular sovereignty, were not only impracticable but irrational (Palti). They found the dynamics of federalism, representative politics and secularization deeply disturbing. Regional autonomy, popular mobilization, the never-ending feuds between different branches of government, and the deterioration of "public morality" constituted inexhaustible springs of instability, and left the government without the necessary means to quell turmoil.

These fears and their vision of modern State-building conditioned the Conservatives' collaboration with Antonio López de Santa Anna in his last episode in government (1853–1855). The Conservatives endowed the general with dictatorial powers: all representative bodies except municipalities disappeared, the press was muzzled, and political opponents exiled. The Conservatives, led by Lucas Alamán, believed that by concentrating power and suppressing political debate they would gain the time and the freedom of movement they needed to equip the national government with the instruments it required to remake society. They created codes regulating commerce and justice in an effort to ensure the stability and predictability of citizens' everyday lives. A new ministry, that of *Fomento*—promotion— would gather pertinent statistical information so that the government could actively direct

and encourage economic growth (Lira 1980, Vázquez Mantecón). These technocratic hopes would soon be dashed by the actions of His Most Serene Highness—as Santa Anna called himself. The president did little more than enter into shady deals with Spanish moneylenders and alienate everyone from regional strongmen like Juan Álvarez in the South and Santiago Vidaurri in the North, to former allies such as Puebla politician Antonio de Haro y Tamariz. This broad opposition crystallized around the Plan de Ayutla, which called for the overthrow of the government and the election of a constituent Congress.

The Ayutla movement brought onto the stage of national politics a new generation of Liberals, intent on ridding society of the stifling legacies of colonial rule: powerful corporations sheltered behind their *fueros*, particularly an influential Church that they thought monopolized national resources and loyalties, a backward economy made sluggish by internal tariffs and the prevalence of entailed property, and an Indian population marginalized by language, custom and poverty. Once in power, they tried to use the executive office and Congress to undertake this transformation without ruffling too many feathers. The Juárez law established legal equality and eliminated all special jurisdictions, except those of the Church and Army, whose courts could still handle certain criminal offenses. The Lerdo law ordered all entailed property belonging to the Church, Indian communities and municipal governments to be sold, but it was these corporations who were to receive the product of the sales, without, in the case of the poorer peasant communities, paying the government tax. The Liberals even argued that they were doing Catholicism a favor, by restoring the primitive Church's poverty and humility. Liberated from the mundane burden of administering its lands and buildings, the Church would better fulfill its pastoral mission.

The 1857 Constitution aimed to create a "popular, representative, federal republic." Drafted in the wake of the Santa Anna dictatorship, it subordinated the president to a powerful, single-chamber Legislative Assembly, and set up the Federal government as the guarantor of a long and detailed list of "rights of man." "The people" elected the President and Congressmen, and even the members of the Supreme Court. The Constitution established practically universal male suffrage—the only requirement for voting being that the citizen have "an honest way of living"—but maintained indirect elections in which all could participate but few could decide. Although freedom of conscience had originally been included as one of the rights acknowledged by the constituents to be "the basis and object of social institutions," it was excluded, after much heated discussion, from the final text. Still, the 1857 Constitution is the first that does not establish Catholicism as the national religion.

Reactions to the new law of the land were mixed. Many radicals thought it fell short. Most army officers, who had so often held the balance of power in the *pronunciamiento*-ridden preceding decades, chafed in the face of their loss of privilege. The newly elected administration of Ignacio Comonfort felt that the Executive was left powerless as uneasiness spread. For the Conservatives, the Constitution spelled chaos, with its attacks on the Church, the return to federalism and greater popular participation. Finally, as the two visions of what Catholicism should be collided (Gilbert), the Church condemned the new fundamental law. Even if religious toleration had not been established, the bishops insisted that freedom to teach and publish without the Church's supervision endangered the souls of their flock. The loss of Church property, and of the clergy's special jurisdiction, dealt severe blows to ecclesiastical finances and authority. Nevertheless, the bishops' arguments against these measures turned on the Church's status as a "perfect" society, instituted by the Savior himself, and in whose affairs the State had no right to intervene (O'Dogherty).

Civil and spiritual authorities confronted each other, each claiming sovereignty. Amid rising turmoil, President Comonfort ordered all government employees to swear to abide by the Constitution, and Mexico City's Archbishop responded by announcing that those who swore allegiance to the constitution would be excommunicated. Henceforth, the good Catholic could no longer be a good citizen.

In December 1858, Comonfort, facing growing opposition from friend and foe, decided to dissolve Congress and disown the Constitution with which, he claimed, it was impossible to govern. This did not satisfy the most rabid opponents, and less than a month later he was deposed by a military coup. General Félix Zuloaga immediately abolished all reformist legislation. Benito Juárez, a Zapotec lawyer who had tenaciously climbed from the bottom up the steps of state and national politics, and who had been elected president of the Supreme Court, took up the mantle of the Constitution. With the support of several governors who feared the restoration of centralist rule, Juárez established the constitutional government in the port city of Veracruz. The country split in two under two rival governments, each unwilling to compromise. The *Guerra de Reforma* had begun.

During the first few months, the Conservatives' greater military expertise enabled them to control the central valleys and the most important cities. Liberal resistance in the periphery—in the North and in Guerrero, as well as in some areas of Michoacán and Puebla—could not be quashed, and the Conservative army proved unable to take Veracruz, whose customs house had been the national government's most important source of revenue since Independence. If some of the rural population remained aloof from the conflict (González y González), many peasant communities, mobilized by local interests and grievances, forged complex alliances with both Liberal and Conservative military commanders (Mallon, Meyer 1984, Thomson). The war thus became more widespread and more intransigent. In desperation, both governments looked abroad in hope of breaking the stalemate. Each negotiated onerous treaties—the Mon-Almonte between Spain and the Conservatives and the McLane-Ocampo between the United States and the Liberals—in which each gave up much in exchange for diplomatic recognition and vague promises of support. By mid-1859, the Juárez government left moderation behind and decreed the separation of Church and State and nationalized Church wealth as a punishment for the clergy's support of the Conservative rebellion. Conversely, the Conservatives' program was limited to freezing the *status quo*; they had exhausted all sources of revenue and their exactions had alienated their allies. In 1860, the tide of the war turned, and the Conservatives were consistently routed by what they had derisively called an "army of lawyers." In January 1861, Benito Juárez and his government triumphantly entered the capital.

The victorious Liberals would not have an easy time. They were internally divided, and unable to put down the Conservative guerrillas whose violence claimed the lives of three of the most prominent Liberal leaders: Melchor Ocampo, Santos Degollado and Leandro Valle. The economy was in shambles, and the government was bankrupt. In July, President Juárez announced that his government would postpone payment of its foreign debt. The Republic's largest creditors, Great Britain, Spain and France, agreed on military intervention to collect what was due to them. For Napoleon III, emperor of the French and principal promoter of armed invasion, intervention went beyond the usual gunboat diplomacy required to discipline wayward, undeveloped nations. His action came as the United States was consumed by its own Civil War. The French emperor saw in the "Mexican adventure" an opportunity for extending French influence in the

New World, securing access to Mexican silver, and for protecting "Latin" culture against the Anglo-Saxon menace (Lecaillon, Black).

Napoleon III hoped to create a puppet monarchy in Mexico. He counted on the active support of notable Mexican exiles, such as former cabinet minister José María Gutiérrez de Estrada, who for over a decade had lobbied the courts of Europe for just such a project, and on the acquiescence of most defeated Conservatives. Thus, when Spain and Great Britain, satisfied with the Juárez government's assurance of payment, left the country, the French expeditionary force stayed on and advanced towards the capital. After being humiliated in the battle of Puebla (May 5, 1862), Napoleon's soldiers marched into the capital in June 1863, and were received much as the Veracruz government had been a few years earlier. An Assembly of Notables declared that a "moderate monarchy" was the form of government most convenient to the country, and invited Maximilian, the Austrian emperor's younger brother, to sit on the newly-created throne. Once more, the Republican government undertook a pilgrimage, finally establishing itself on the US–Mexico border, in Paso del Norte, Chihuahua.

After the fall of Emperor Iturbide, monarchism was deemed to be the stuff of traitors, conspirators and perhaps even some misguided Indian *pueblos* (Soto, Pani 2008). Nevertheless, Maximilian's Empire managed to rally support from unlikely quarters. His administration included not only Conservative officers and politicians, but many prominent Liberals. For many of these men, the Empire, even if upheld by an unwarranted foreign invasion, seemed to offer peace to a war-weary nation. Some thought that a monarchy, by taking the seat of power out of competition, would domesticate politics. They saw this as a momentary political truce, which could be used for the construction of the administrative machinery that the state was so sorely lacking. As civilians, they believed that the presence of a modern professional army would liberate them from constantly having to negotiate, from a position of weakness, with armed strongmen. Some were convinced that the government of an Austrian prince, backed by the French, would attract foreign investment and promote economic development (Tenenbaum 1991). Many Catholics prelates thought the Hapsburg prince would be able to heal the wounds of a ravaged society, by restoring harmony between Church and State. Beyond the world of political elites, the Emperor and his wife showed special interest in the Indian population, and by establishing a *Junta protectora de clases menesterosas*, they created a place where the indigenous could express their grievances. Some communities, especially in the central valleys, saw this as an opportunity to restructure their relationship with the national government (Del Arenal, Meyer 1993, Marino).

Yet, the fact that the Empire attracted such diverse elements, while attesting to Napoleon III's imagination, Maximilian's abilities and national politicians' resilience, turned out to be one of its weaknesses, as it proved unable to create lasting commitments. Napoleon III's ambitions ran up against Maximilian's defense of Mexican sovereignty, particularly when the French emperor attempted to establish a protectorate in Sonora. In 1866, under the threat of Prussian expansionism, Napoleon III recalled his army with little regret. Those who had prayed for a Catholic restoration were quickly disappointed, as the imperial government ratified religious toleration and the nationalization of ecclesiastical wealth. Imperial finances were a disaster, and the French army proved unable to pacify the country. The imperial government put out an impressive array of legislation, which included the first national civil code and a new "scientifically-designed" territorial division, but the longed-for efficient government that would guarantee law and order did not materialize. When the expeditionary army left, the Empire

crumbled. In June of 1867, Maximilian was executed outside the city of Querétaro, along with two of his generals, the young Conservative Miguel Miramón and Tomás Mejía, cacique of the Sierra Gorda.

Victorious Liberals hailed the Reform as a revolution and the War Against Intervention as the Second War of Independence. The official version of history—soon taught in public schools and celebrated in town squares—turned Conservatives into traitors. The Constitution of 1857, arguably a rather clumsy instrument for government, had served as the Liberals' rallying point during ten years of domestic and foreign conflict. In 1867, it was consecrated as the banner of the Republic, the embodiment of the *Patria*. Until the Revolution in 1910, the 1857 Constitution provided politics with not only a juridical framework, but a potent symbol of republican purpose and patriotic unity.

From an Economy in Shambles, the Seeds of "Progress"?

A general overview of economic activity during what Liberal historians would hail as "the great national decade" seems pretty dismal. The ten-year war put an end to the modest economic recovery that had been taking place, essentially at a regional level, since the end of the War of Independence (Sánchez Santiró). Although industrialization had a relatively early start in the 1830s, its growth was blocked by an impoverished, fragmented market and the constant instability caused by political conflict and war (Gómez Galvarriato). Despite the unwavering interest of governments of every political inclination, the construction of the longed-for railway that would unite Mexico City and Veracruz, and whose construction had begun during the US intervention, barely advanced and was only completed in 1873. The 1861 moratorium on the payment of foreign debts and the outrageous deals rival governments entered into with moneylenders—best illustrated by the Conservative government's issuing the Swiss Jean-Baptiste Jecker fourteen million pesos in bonds against 75,000 pesos cash in 1860—speak to the desperate state of public finances (Tenenbaum 1986).

On the other hand, although the architects of the 1857 Constitution undertook important changes in the legal structure of the economy, most of these did not have any effect, due to the convulsed state of society until the regime of Porfirio Díaz after 1876. Although the Constitution abolished *alcabalas*, the internal tariff of colonial origins, it was not until 1896, after arduous negotiations between the federal and state governments, that the abolition came into effect (Salmerón). Many Liberals thought the sale of entailed property prescribed by the Lerdo law would have far-reaching equalizing effects, but peasant communities usually put off the privatization of their lands, while the sale of Church property, even if firmly in the hands of the government after 1859, led to greater concentration of landed wealth (Bazant 1971). Similarly, those who had supported Maximilian's Empire because it would bring about economic development were dismayed when the first loan that Mexico had been able to float on the European market since the 1820s disappeared into the French army's coffers. If the purpose of both Liberal and Conservative economic policies during the 1850s and 1860s had been to consolidate capitalism (Scholes), create a healthy, unified market and tone down the extreme inequality that divided the people, the disjointed, bankrupt economy of 1867 spoke to their failure. Nevertheless, a series of elements were introduced during this period of war and conflict that allowed for and shaped subsequent developments.

Twice in ten years, the country split in two, under rival governments. Political polarization, civil war and foreign intervention, with all the trauma and destruction they entailed,

also opened the door to certain opportunities. Despite the fact that the Ayutla movement had drawn much of its strength from regionalism, the constitution of 1857 allowed for strengthening the federal government, both by endowing it with greater taxation capacities and by centralizing political power that would be put to use during the last quarter of the century (Carmagnani, Medina). While it is true that the debates within the imperial government on the nature of a national bank came to nothing, it was during Maximilian's government that the nation's first commercial bank—the *Banco de Londres y México*—opened its doors in the capital (Ludlow 1998). As to the government's apparently permanent state of destitution, the Liberals' victory over the Conservatives first and the French army later set the stage for more active diplomacy, and particularly for debt negotiations, in that debts incurred by the "usurper" were deemed illegitimate and often not paid (Cosío Villegas, Pi-Suñer 2006, Topik, Villegas 2005).

On the other hand, while the nation of prosperous, commercially minded citizen-farmers envisioned by the Liberals did not come about, the execution of the disentailment and nationalization laws and the state of war did affect the structure of property ownership and the relationship between economic and political power. The depressed war economy led some large landowners to sell their less productive properties in lots, thus giving birth to small communities of *rancheros*, such as San José de Gracia in Michoacán (González y González). If only rarely, Republican authorities sometimes confiscated lands belonging to *imperialistas*, to be allotted among their tenants (Bazant 1983). While most Indian communities were slow to disentail their property, there were cases in which allotment and privatization proceeded swiftly—even if in a rather contrived manner, as peasants relied on the legal fiction of *condeñuazgos*, or agrarian societies, to continue exploiting the land communally. Perhaps brandishing the Liberals' sacrosanct principle of private property made it easier to defend a pueblo's land against the encroachments of neighboring communities (Mendoza, Escobar). Finally, when the Juárez government nationalized Church wealth and accepted all government bonds in payment, it attracted the moneyed elite—politically a very fickle bunch—and created economic incentives for their supporting the Liberals (Ludlow 1995).

Memory and Celebration

The men who campaigned, debated, legislated, conspired and fought during these turbulent years were certainly state-obsessed. The government they envisioned was to secure law and order, but also to promote economic development and shape the minds of its citizens. This is why the Liberals sought to free education from clerical influence, and legislated to keep religious displays, such as processions, within church walls. They took to altering the urban landscape, in which religious architecture had left a deep imprint, by opening streets through convent buildings and setting up libraries inside old churches, in an attempt to claim public space for the nation. But mid-century politicians also knew that a State would falter without a Nation. In order to construct an imagined community, territorially circumscribed, they needed to set the boundaries of the country that had just been mutilated, and deem its geographical and cultural features as peculiarly Mexican. They also sought to create the affective bonds that would unite eight million individuals separated by space and politics, by inequality, by culture and sometimes by language.

In 1847, even in the wake of humiliating defeat, Mariano Otero asserted that the bonds of the national community should be fashioned out of shared interests and the

"affections of the heart." During the next two decades, the nation's architects worked on the latter rather than on the former, on spinning tales of shared heroism and painting dramatic pictures of a past held in common, whose most stirring episodes could be periodically celebrated in cities, towns and villages throughout the country. But if recovering the memories of an artificial community is always contentious, between the end of the U.S.–Mexican War and the fall of the Second Empire, the construction of *Historia Patria* became another element in the fierce struggle that divided the nation.

Men of science and letters took it upon themselves to construct a permanent image of the nation, to draw and set its boundaries, and to name and place its principal geographic and hydrographic features, by setting the nation down on paper. They also sought to articulate, in their writing, a genuine Mexican voice that would characterize a national— and nationalist— literature. It was a grandiose task in which, despite its profoundly political nature, men of all ideological inclinations participated, by presenting their research and lectures before learned societies such as the *Ateneo*, the literary society of San Juan de Letrán Academy, or the *Sociedad Mexicana de Geografía y Estadística*. In 1857, the geographer Antonio García Cubas drew on this Society's previous work to draw up and publish the first general map of the Republic (Craib). These men also collaborated in extensive editorial projects that they felt would contribute to on the one hand consolidating Mexico as a natural entity, and on the other to validating its rightful place among civilized nations. Thus, geographers, historians and philologists who often stood in opposite political trenches, wrote erudite articles on the nation's demography, its mountainous ranges and its indigenous dialects for the *Diccionario Universal de Historia y Geografía*, published in Mexico City between 1853 and 1856 (Pi-Suñer 2000). Others recreated, through colorful verse and amusing engravings, the water-bearers, street vendors and other popular "types" that animated the streets of the cities, in *Los mexicanos pintados por sí mismos, tipos y costumbres nacionales*, published in 1854 (Pérez Salas).

It was precisely because the arts and sciences created places in which political animosity could be put aside that Maximilian founded the Imperial Academy Science and Literature in 1866, in the hope of fostering reconciliation within a deeply divided society. At one of the Academy's meetings, Manuel Larrainzar, a historian, politician and diplomat from Chiapas, presented the first systematic outline for a general history of Mexico, from pre-Columbian times to the arrival of the Emperors. Nothing came of it, because the time for a general history that told a harmonious story of open-ended national development had not yet come. History, and specifically public history, had become a battleground in which each contender fought to impose its own version of what Mexico had been, and hence of what it would be.

During the first decades after independence, much of what historians—who were almost without exception also politicians—wrote served to justify actions taken and attitudes assumed in the course of the early nineteenth century. Nonetheless, patriotic celebrations, although never free of controversy, managed to bridge opposing views of the immediate past. Independence was celebrated as the precious fruit of the efforts of both the Insurgents and the army of the Three Guarantees; Hidalgo and Iturbide were both hailed as heroes, even if this meant, as was ironically pointed out, celebrating the feats of one who was persecuted by the other. This tension-ridden consensus was to break at mid-century, when in 1849, the Conservative newspaper *El Universal* published an article condemning the Hidalgo uprising as criminal, resulting only in pillage, murder and "hatred between brothers." The Liberal press was horrified. Consequently, patriotic celebration became not a moment for enacting national unity—even if fictitious—but for

expressing factious politics. The national anthem, commissioned by Santa Anna in 1853, lost the verses that saluted the deeds of the "Immortal hero of Zempoala" after 1855. Between 1864 and 1867, Republicans living under imperial rule celebrated France's 1862 defeat outside Puebla. Conflicting versions of the past came to embody alternative visions of the nation: Conservatives celebrated Iturbide and the cultural legacies of Spain and Catholicism, while the Liberals claimed to be "Sons of Hidalgo," conceived in Liberty in 1810 (Pérez Vejo).

During the Second Empire, Maximilian and his collaborators tried to build a conciliatory version of the past that would underpin what they hoped would be a healing process. They rescued both Hidalgo and Iturbide as founding fathers, and celebrated the glories of the Pre-Columbian past. They hoped to seduce the population with eye-catching displays of this soothing tale, through architecture, public art and official celebrations (Acevedo, Duncan). But the Conservatives felt greatly insulted by the emperor's decision to celebrate Independence on September 16, the anniversary of Hidalgo's *Grito*, and not that of Iturbide's entrance into Mexico City, and by his describing José María Morelos as a hero for all times, a representative of the "mixed races" that combined to make an "indivisible nation." Imperial mythology, then, rather than bringing Mexicans together, alienated those who were supposed to be the monarchical regime's natural allies.

On the other hand, Maximilian and Carlota's fascination with all that was Indian caused mostly uneasiness among an elite that was not quite sure of what to do with the legacies of the Pre-Columbian past. Only the Austrian architect Karl Gangolf Kaiser had wanted to include "motifs from Aztec architecture" in the renovation of the imperial capital, while his Mexican colleagues voiced a distinct preference for Greek and Roman classicism (Acevedo). Conversely, as the Republican opposition ridiculed Maximilian's sympathizers as silly fops mimicking foreign ways—such as the Countess of Ciénega and Nopalito, who appeared in the satiric newspaper *La Orquesta*, claiming to love life at Court, even if she did have to wear itchy underwear—it set up popular types as the epitome of the authentic Mexican (Díaz y de Ovando). During the French Intervention nationalist discourse would successfully take on the voice of *chinacos* who wore the workclothes of the countryside and ate *frijoles*, but it would lack a coherent story to tell until defeat relegated the Conservative's alternative vision to the sidelines. Artists and intellectuals would not be able to display proudly the features of Aztec and Maya aesthetics until the Indian, although still embodying a "problem," had become less of a threat to the Liberal polity (Lira). Official nationalism would have to wait for more prosperous public finances in order make the moral tales of patriotism tangible through monuments, electric displays and textbooks.

How the story has been told

Reform and Intervention became, almost immediately, some of the basic building blocks of a Liberal patriotic myth, while President Juárez came to embody, even beyond national borders, heroic resistance against imperialism. Those who had fought the Conservatives and the French invaders on the battlefield were quick to take up the pen to finish them off. The year of 1867 saw the execution of Maximilian and the publication of the first book singing the praises of the Liberal victors (Arias). The Conservative response was equally swift and partisan, but significantly more bitter (Arrangoiz). The resonance, throughout Europe, of Maximilian's execution, brought forth a wealth of

literature, both testimonial and historiographic, and a well-known series of paintings by Edouard Manet. In the wake of France's defeat against Prussia, many of these works sought to find reasons for the "Mexican adventure"'s most tragic end, be they the naïveté of the young Hapsburg prince or the perfidy of the French Empire; Mexican treachery or French greed (Salm Salm, Brincourt, Basch, Kératry, among others), while others saluted the Mexican victory as that of liberty against despotism, of a rosy future against a decrepit past (Pruneda, Quinet). The heartbreaking tale of a young, well-intentioned prince executed and a princess gone mad would time and again serve as a plot for both sympathetic biographies and colorful works of fiction (Corti, Usigli, Haslip, Dieterle, among others).

Despite the Empire's aura of romanticism, the historiography has reduced the monarchical experiment—the "so-called" Empire—to an unfortunate accident, alien to the nation's historical development, significant only in that, with the French intervention, it had constituted the Republic's foe, and had been vanquished. During the last two decades of the nineteenth century, the events of the 1850s and 1860s were incorporated into general histories—*México a través de los siglos* (1884–1889) and *México, su evolución social* (1900)—that did a good deal to shape the nation's historical imagination. These grand narratives, underpinned by voluminous research and a wealth of footnotes, told the dramatic story of the nation, as good finally triumphed against evil. Mexico had shaken off the yoke of Spanish domination in 1821, and between 1855 and 1867 it had thrown off the shackles of theocracy and reaction, and vanquished the menace of foreign expansionism. A single heroic line ran from Hidalgo, Morelos and Guerrero to Zaragoza and Juárez while Iturbide, Santa Anna and the imperialists were found to be equally villainous. This story, and the patriotic liturgy that went with it, came alive and reached a broader public through periodic celebrations and the dramatic images of patriotic sacrifice disseminated by engravings, textbooks—as *Historia Patria* became compulsory in elementary schools (Roldán Vera)—and puppet shows (Beezley).

Early in the twentieth century, the irascible Porfirian politician, Francisco Bulnes, tried to shake up this nationalist tale by denouncing the political uses of history. He wrote, with a pen dripping poison, to question the accomplishments of mid-century Liberal radicals—who had been "great destructors" of harmful anachronisms but rather less impressive as founders of a new order—and especially to deny that Benito Juárez, whom the official version had transformed into a bronze idol who had no faults and never made mistakes, had been an unwavering Liberal who had single-handedly saved the nation from perdition (Bulnes). Although criticism of the 1857 Constitution was common among certain public intellectuals (Rabasa), Bulnes' vitriolic condemnation of *El Benemérito* was deemed tantamount to treason. The furious, indignant responses it produced, both within the Porfirian establishment and among the "orthodox" Liberal opposition, fed into what is perhaps most profuse editorial production on the Liberal Reform (Jiménez Marce). Don Francisco's early challenge to an "*historia de bronce*" only served to reinforce the notion that good history had to honor—or discredit— legitimate and teach. Juárez the symbol, rather than the historical actor, was to become, despite Justo Sierra's human portrayal (Sierra), the most ubiquitous of national heroes (Weeks), but also perhaps the most monochromatic and lethargic.

The effectiveness of the Liberal myth is attested to by the fact that the Revolution claimed it as its own, even if many of its objectives were to undo what the *Reforma* had done (Brading). Zapata, Villa, Madero and Carranza were held up as heirs to Juárez in an unbroken genealogy of "Heroes who have given us a Nation" (*Héroes que nos dieron*

patria). PRI elder statesman Jesús Reyes gave the improbable connection between a heroic Liberal past—from which the Porfiriato was duly expelled—with the governments of the Revolution, its most sophisticated, erudite construction (Reyes Heroles). The general story line remained the same: a tale of villains and heroes, in which two coherent projects, completely closed off from each other, one looking to the future, the other pining for the past, faced off against each other from 1810 onwards. In a cast that had become overly familiar, the Church played the somewhat overblown role of the greatest scoundrel, while Juárez, stiffened by the corset of prescribed virtue, dwarfed all other protagonists, in that "his being" had "blended so inseparably with that of his country" (Roeder, Tamayo, Henestrosa). Perhaps the only surprise was that peasants, who now attracted the attention of historians, prodded by the abuses of local clergy, had leaned towards the Liberal side (Powell). Conservative historians wrote from the other side of the ideological mirror, but with the same tone and intent (Vasconcelos, Salmerón, Abascal).

Nevertheless, especially since the late 1960s, the sensibilities of certain historians and the greater professionalism and cosmopolitanism of the historiography brought about less rigid, more textured, more diverse visions of the decades that followed Mexico's defeat against the United States. Thus José Fuentes Mares spoke against the "idiotic pretension" of reading Mexico's nineteenth century through the lens of the partisan feelings of the present. The prolific historian wrote eight books (1954, 1960, 1962, 1963, 1965, 1966, 1974, 1976), in which the birth-pangs of the Liberal nation gave way to the thoughts, feelings and grandiose gestures—both public and intimate—of the flesh and blood actors involved in a colorful drama. Others tried to look beyond politics, to social and economic issues, in order to calibrate what the mid-nineteenth century "revolution" had accomplished (López Cámara, Bazant 1971, Knowlton)

In 1967, Edmundo O'Gorman bemoaned that in exalting the Republic's Liberal past, its historians had denied relevance and legitimacy to its Conservative, monarchist alternatives, deeply rooted in the colonial past. Since everyone already knew that villains were bad, no time was wasted in studying them (1969). Historians were slow to heed O'Gorman's call, but, slowly, a more balanced vision began to emerge. If, traditionally, Santa Anna—the epitome of the corrupt, opportunistic, frivolous *caudillo*—had been made responsible for the country's dismal state at mid-century, Moisés González Navarro took on the methodologically complex task of explaining the Santa Anna phenomenon by examining the structure of society, instead of going the other way around (1977). More recent studies have revealed the multifaceted political and administrative projects of those surrounding His Most Serene Highness (Lira, 1980, Vázquez Mantecón), and while depicting nineteenth-century Mexico as "one man's country" will still get you published (González Pedrero), we now have a suggestive picture of the complicated dynamics that underpinned Santa Anna's power politics (Fowler).

Along the same line, we now have a better understanding of the visions, motivations and actions of those who had previously played rather stilted roles as clerical reactionaries, despicable traitors or mendacious invaders. Elías Palti's analysis of the fierce debate among Mexico City newspapers in 1848–1851 highlights the radical departure embodied by the Conservative *El Universal*, which on the one hand tore the theoretical premises of liberal politics apart, and on the other put forth an exceptional vision of the possibilities for civilized party politics (Palti). In a growing number of studies, Maximilian's collaborators (Pani 2001, López González), the French interventionists (Dabbs,

Lecaillon, Meyer 1993, Black) and the Church (Gilbert, O'Dogherty, Connaughton) appear in a new light, speak with their own voices, and tell different stories.

While the "evil doers" have been rescued from obscurity, the heroes have also benefited from an examination that is not concerned with nation-building. The historiography has, in this aspect, benefited from the analysis of those looking from without, intent on tracing the operation of broader phenomena—the consolidation of capitalism (Scholes), the evolution of representative government (Knapp) or regional responses to national politics (Berry). They have opened up lines of inquiry that have revealed the varied, sometimes contradictory ways in which the Liberals reacted to the circumstances around them (Sinkin, Villegas 1997), and released both Juárez and *Reforma* historiography from their mutually stifling embrace (Covo). Historians are now reconstructing, in what is perhaps some of the most provocative research on the period, the strategies and reactions of individual and collective actors not involved in high politics (Mallon, Thomson, Marino, Nelen, McNamara). Conversely, Juárez now appears as a politician of exceptional abilities (Hamnett) rather than as the disembodied Spirit of whatever principle current politics prescribed—heroic nationalist resistance, strict legalism, administrative honesty or democratic commitment.

The reason these works have marked a fresh departure for the ways in which we understand the second half of the nineteenth century is perhaps that their authors have not assumed from the start that the Liberal triumph was inevitable, and that it signified either a blessing or a curse. They have uncovered a more complex relationship between political ideas, economic interests and social structures. They have shown that discourse and practice are, despite apparent contradictions, deeply interconnected, that they cannot be easily classified as old or new, good or bad, and that rival projects constantly inform each other. It is a much messier history, but it is also more interesting. The last word however, has not been said. Given the density and turbulence of the period of 1848 to 1867 and the multiplicity of factors and actors who shaped historical experience, these works merely point towards exciting new directions in which to travel.

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CHAPTER SIXTEEN

The Penal Code of 1871: From Religious to Civil Control of Everyday Life

Kathryn A. Sloan

Mexico's transition from colony to republic was prolonged and fitful especially regarding the development of an independent body of criminal law and procedure. The protracted Wars of Independence (1810–21), the era of Santa Anna (1833–55), the War of Reform (1858–61), and the French Intervention (1862–27) delayed the nation's juridical break from its colonial past. Even though leaders initiated early attempts to make new laws, a half century of political pandemonium thwarted the codification of a national civil code until 1870 and a national penal code until 1871. Both codes oozed with liberalism, that drew on the heritage of José María Morelos and other early heroes, who deserve credit for enshrining liberal principles into the minds of all Mexicans. Equality of individuals before the law, fair taxation, and popular sovereignty composed the mantra of early statesmen. In 1813, Morelos set out his vision for nationhood when he called for the abolition of slavery and castes so that "all shall be equal; and that the only distinction between one American and another shall be that between vice and virtue" (Morelos (2006) 189–90). Independence leaders envisioned a society where individuals stood alone to account for their deeds, not judged by their corporate memberships, with no room for arbitrariness on the part of magistrates. These were heady times indeed and the rhetoric of liberalism and its promises for a different society resonated with intellectuals and the masses alike.

Lofty rhetoric aside, "vice and virtue" in Morelos's dictate would be the operable phrase that would reveal the paradoxical mindset of nineteenth-century liberals. They desired to promote liberalism and its ideals—individual guarantees and the sovereignty of the people—but also wished to preserve existing social and political hierarchies. While liberals made significant strides in modernizing the judicial process and providing basic rights to the accused, underlying colonial values that denigrated the poor and indigenous and subjugated women still shaped prevailing criminology and judicial practices. After all, the Penal Code of 1871 was a product of Enlightenment ideals but also an artifact of nineteenth-century society. Studying legal codes by themselves would paint a false

portrait of how Mexicans viewed and prosecuted criminals. Therefore this chapter analyzes the 1871 Penal Code and how it differed from or aligned with colonial era jurisprudence. More and more Mexicanists have tackled the problem of sorting out law from its practice in everyday life. The focus here is on Mexicans, young and old, rich and poor, men and women, and how their lives changed when the church no longer wielded authority over their sexual lives or punished some criminal behaviors. The writers of the Code presupposed equality before the law, but were Mexicans actually equal across lines of race, gender, and class when they walked into court?

1. The Church and Secular Laws

Independence, there is no doubt, transformed the relationship between the church and its flock. Blasphemy, renouncing God, and witchcraft remained immoral behaviors but the new government did not prosecute venal sins as the Inquisition had during the colonial period. While Mexicans no longer faced corporate punishment for committing certain sins, the demise of ecclesiastical courts also removed some protections for women. Mexicans maintained their religious beliefs and marked their cycles of life—birth, baptism, marriage, and death—with the sacraments. Now the state increasingly intruded, as the church had earlier, on seemingly private matters like sexuality and conjugal conflict. Government officials enthusiastically donned the mantle of regulating popular morality in the nineteenth century.

Several laws mandated the removal of the church from public life. Benito Juárez passed the Ley Juárez (1855) that abolished religious *fueros* (immunity from civil prosecution) and its Article 42 put an end to ecclesiastical jurisdiction in civil matters. A civil register for births, marriages, and deaths followed in 1859. Couples could marry in the church, but also had to ratify the marriage in a civil process for it to be legal. The secularization of life course events removed the onus on the masses, who previously had to pay clergy fees to marry, for death rites and burial, or for copies of personal documents (Hernández Chávez and Klatt (2006) 148). Another 1859 law banned all male religious orders, confraternities, and sisterhoods. Likewise no new convents could be founded and the wearing of the religious garb of suppressed orders in public was forbidden (Herbermann (1911) 267). Marriage and divorce became legitimate only when validated in a civil procedure in 1859. That year also saw cemeteries and burial become secular affairs through a series of civil laws. Subsequent legislation in 1860 outlawed the right of criminals to seek asylum in churches and police ordinance regulated the ringing of church bells in towns and cities. In 1861 all hospitals and charitable institutions were secularized and placed under the control of civil authorities, and the 1871 Penal Code criminalized illegal burial (CP [1871] Art. 881–3) and the desecration of an interred corpse with three years in prison (CP [1871] Art. 885). An 1874 law prohibited religious instruction in federal, state, and municipal schools but allowed for the teaching of morality as long as there were no references to religion (Herbermann (1911) 268). Certainly practice did not immediately follow legislative changes but it is clear that the rules of society became more secularized and imposed by the state.

The Constitution of 1857 guaranteed all individuals certain rights if accused of a crime. Importantly court fees were abolished, thus opening up the legal process to the poor. While in colonial times an accused could languish in jail without knowing the accusation, the Constitution of 1857 required that each person be informed of the charge, the accuser's identity, and given the opportunity to provide a statement within 48 hours

of detainment. Defendants also had the right to confront witnesses against them and be supplied with ample information to prepare their defense. The government made public defenders available for the first time. These were indeed lofty goals but also paramount principles to "correct the most egregious failures of colonial criminal practice, to facilitate popular acceptance of the liberal regime, and to set the parameters of subsequent criminal law" (Buffington (2000) 114). Courts no longer recorded race in legal documents and individuals were tried on the basis of their deeds or misdeeds and not on their membership of a particular ethnic or social group.

2.   The Penal Code of 1871

Political chaos and violence characterized the nation's early history, yet leaders set out right away to enshrine liberal values in the first Constitution (1824). At the same time, several states took up the task of developing civil and penal codes. The state of Oaxaca devised the first civil code in all of Latin America in 1828 and the state of Veracruz developed the first penal code in the nation in 1835. Both drew on models from France and Spain. National penal and civil codes would take longer, both coming to fruition during the Restored Republic after 1867. Until the promulgation and enactment of the Penal Code of 1871, magistrates relied on colonial law or hastily enacted decrees to prosecute crime through the tumultuous first half-century of independence. When Benito Juárez and his fellow liberals recaptured power, the long stalled cadre of jurists set out to bring their vision of criminal jurisprudence and reform to fruition.

Classical law, born out of Enlightenment legal principles such as equality before the law, free will, moral responsibility, and punishment proportional to the severity of the crime, influenced the writers of the 1871 Penal Code. These budding criminologists drew from the ideas of Cesare Beccaria's rationality and Jeremy Bentham's utilitarianism to devise a code that endeavored to lay out the absolute minimum level of punishment that would deter criminal behavior (Buffington (2000) 34). In other words, legal theorists of the classical school considered criminals and would-be criminals as rational beings who would recognize that crime does not pay if its punishment outweighed its rewards. They viewed the setting of punishment as an exact science because it must serve the specific goal of castigating the individual but also act as a general deterrent to the rest of society. Bentham's notion of utility played a role as well. A carefully determined level of punishment commensurate with the severity of the crime would force the would-be criminal to consider his actions more carefully and, theoretically, lose self-interest and think twice about committing the criminal act (Massoglia and Macmillan (2002) 324–325). The presumption was that all men were endowed with the same ideas of good and evil (Almaraz (1931) 209). All in all these changes heralded a shift from colonial criminal ideology that viewed crime as simply anti-social and punishment as retributive. By the Code's regulations judges could not act arbitrarily or punish someone more harshly depending upon his or her class or status. The meting out of punishment was also more fair, as judges were given fewer conditions that might increase or decrease penalties. In fact, a writer of the 1931 Penal Code lamented that the earlier code was too rigid in how it assigned penalties (Ceniceros (1931) 10). The 1871 Code left little room for judges to be arbitrary or paternalistic. Likewise several forms of punishment were abolished, including whipping, exile to presidios, and labor on public works (CP (1871) Art. 61). The Code defined crimes, laid out their sentences, and stated attenuating circumstances that might temper guilt and increase or decrease fines or prison time or both. Still, a

person's reputation or honor impacted the level of punishment, as did premeditation or violence employed in the criminal activity. Criminals under the age of eighteen received more lenient sentences (CP (1871) Art. 224). Gone were the days of royal pardons, but honor (virtue in Morelos's words) would remain a determining factor in who would warrant legal justice. Certainly race ceased to be recorded in legal procedures but, in practice, race, class, and gender had an impact on how criminologists viewed crime and society and influenced how judges ruled on cases. Buffington argues that the Code's writers veiled its "elitist subtexts" in liberal rhetoric (Buffington (2000) 32) and this is supported in several studies of crime in modern Mexico.

The 1871 Penal Code contained four books covering criminal procedures, civil responsibility in criminal matters, crimes, and misdemeanors. Book Three on specific crimes ran the gamut from crimes against property and persons to slander, homicide, robbery, fraud, and the revealing of secrets from telegraph communiqués, letters, or documents. The essential underlying premise revealed in the code was the distinction between private and public law though, in practice, the divide would be breached by magistrates and become the "central organizing fiction of legal and social life in Latin America" (Uribe-Uran (2006) 69). Increasingly, over the course of the nineteenth century, the state extended its authority into private lives.[1] The state prosecuted public crimes that included such offenses as running illegal games or raffles, public disobedience, begging without a license, or habitual drunkenness. Private crimes included crimes against individuals and required that the aggrieved party pursue the matter in court. Public crimes were defined as harmful to society but the state sometimes viewed private crimes, like *rapto* (abduction by seduction) or *estupro* (deflowering of a minor, sometimes rape), as sufficiently scandalous and thus a threat to public order and acted swiftly and sometimes surprisingly to restore domestic order (Sloan (2008)). Families were viewed as building blocks of nations, thus the officials linked public order with family order. Personal morality and public morality intertwined and another chapter of the code addressed thirteen different classifications of crime under the rubric of "Crimes against public order."

3. Public Order

Like colonial officials, their republican successors fixated on public order and morality. Liberal jurists hoped to ensure political security to build a modern regime, and spent great effort regulating public spaces and arraigning street crimes. These crimes against public order included running illegal games, profanation of the dead or illegal burial, impeding public works, vagrancy, and begging without a license. Begging and vagrancy were targeted behaviors in the nineteenth century as the elite witnessed hordes of the poor moving from the countryside to Mexico City's already crowded barrios. Begging had been outlawed in a 1774 decree that established a poor house for Mexico City's indigent. Silvia Arrom found the decree remarkable because "soliciting alms was a legal and legitimate way to earn a living" as previously society had viewed the poor as protected children of Christ. This ideological shift to considering beggars as vagrants, who had long been criminalized, signaled a change in colonial policy toward the poor, something liberal jurists will modify again with the enactment of the 1871 Penal Code. In Bourbon Mexico City, beggars were indeed rounded up and incarcerated in the poor house and the categories of who was to be considered a vagrant expanded as well (Arrom (2000) 1–2). The 1871 Penal Code narrowed the definition of vagrants to include those who, "lacking property or income, do not exercise an honest industry, art, or trade for a

livelihood without having a valid impediment" (CP (1871) Art. 854). The code legalized begging with a license but censured beggars who lacked official permission, used intimidating tactics to ply alms, or begged in groups of more than three (CP (1871) Art. 858, 860, 861). Arrom contends that government officials accepted begging as a legitimate but temporary livelihood, especially because the nation lacked sufficient social services to address poverty (Arrom (2000) 40). A charge of vagrancy was also used in the early republic against political opponents to take away their voting rights. For example, Congress formed vagrancy tribunals in 1828 and some politicians used the law and social fears about growing crime in the city to make the rounds of taverns and *pulquerías* to sequester alleged vagrants who also happened to support the liberal, York Masons (Warren (2001) 86–7). Liberals of the 1870s may have been aware of the political use of the charge of vagrancy and hoped to tighten up its definition to circumvent its political use. Nevertheless, vagrancy would be a charge leveled at the urban poor time and time again in the nineteenth and early-twentieth century (Piccato (2001)).

The social turmoil of the nineteenth century provided ripe conditions for the proliferation of banditry in the countryside, a clear sign of public disorder. Bandits had plagued colonial officials and tested the sensibilities of national leaders as well. Lacking a national penal code until 1871, leaders continued colonial methods of punishment or ruled by decree to deal with rising levels of brigandage, especially in the states of Puebla, Tlaxcala, and Veracruz. Prior to 1871, punishments for banditry ranged from amputation, flogging, and hanging, to exile in the territories, all holdovers from the colonial era. The "bandit corridor" ran along the highway from Veracruz to Mexico City and almost half of bandits hailed from that region. In the early republic, a bandit could expect to rot in jail waiting for trial. In the 1830s military courts took jurisdiction over banditry, theft, and homicide and Santa Anna used capital punishment in an attempt to deter bandits. Ruthless measures failed to daunt would-be bandits and even Santa Anna's military aide, Juan Yáñez, had used his power to support a network of bandits in the cities and countryside (Frazer (2006)). The emergence of Benito Juárez in national politics signaled a different strategy.

Juárez had his own problems with bandits as governor of Oaxaca, but he laid the groundwork for future judicial changes to deal with the escalating problem, a problem that threatened the modernization of the nation and the security of the liberal state. He formed an armed rural police force (*rurales*) and required that trials take place within 10–15 days of arrest. Public defenders were made available as well. The 1857 Constitution laid out the first changes in how indicted bandits would fare in court. Article 22 forbade mutilation, flogging, torture, and confiscation of property; but bandits, pirates, some murderers, and traitors could face capital punishment (Frazer (2006) 46). Frazer argues that liberals had a stake in criminalizing "lower-class rebelliousness" and, in effect, treated bandits not as citizens guaranteed universal human rights but subjected them to even harsher measures than before. Bandit leaders automatically received the death penalty under the liberal laws. The courts imposed a ten year sentence in a military outpost (a *presidio*) on followers if their actions involved serious injury, rape, or torture (Frazer (2006) 47–8).

The 1871 Penal Code modified the 1857 rules on banditry. No longer could judges order the automatic execution of a bandit leader.[2] Nevertheless harsh penalties still applied. Bandits who robbed but did not kill received twelve years in prison, the same penalty for first degree murder (Art. 402). Actions on public roads that led to death(s) resulted in the death penalty. In the end, the sum of new penalties for banditry was

harsher than the 1857 law or the punishments meted out under the colonial era code after 1821 (Frazer (2006) 53). This fact certainly demonstrates that the state worried that increasing levels of banditry jeopardized their goal to modernize the nation.

Kidnapping (*plagio*) was a serious offense and a tactic that bandits increasingly used to extort money from the wealthy.[3] Faced with the dangers and risks of highway robbery or kidnapping, many bandits chose the latter. The penal code reflected the link between bandits and kidnapping. Kidnappers who executed the act on public roads could get four to twelve years of prison or face death (CP (1871) Art. 628). Potential prison time did not deter banditry, especially during the Porfiriato, and, tellingly, President Díaz amended the Constitution in 1901 to make kidnapping a capital offense (Frazer (2006) 53). Vanderwood argues that the state feared the idea of banditry and its disruption of social peace rather than the individual bandit, and punished these rural rebels severely with little room for the amnesty that they granted other types of rebels (Vanderwood (1992) xxxv–xxxvi).

Public officials thought illegal gambling an egregious cause of public disorder and the Code endeavored to shut it down. The national government ran a sanctioned lottery and surely did not want its centavos squandered on clandestine games of chance. Government leaders censured gambling house owners, employers, and customers, but were especially concerned about impromptu games of chance in public and punished organizers of such games, players, and even spectators with substantial fines that they increased for repeat offenders (Art 870, 873). An enterprising individual with little overhead could set up a game of chance in public and quickly disperse if they spotted police. Surely these street games, rather than private houses, attracted more working class individuals and politicians feared plebeian vice. The code charged officers of the law with shutting down gambling houses and pursuing gamblers in the city streets. If a police officer failed in his duty, he suffered a fine and the loss of his job (Art. 876). If he benefited from the proceeds by kickbacks or gambled himself, he faced stiffer penalties. The Code also defined a cardsharp (*tahúr*) or professional gambler as someone caught three times in one year and suspended the person's citizenship by taking away the right to vote (CP (1871) Art. 879). Illegal games and gambling seemed to flourish during the nineteenth century, even with the Code demanding its prosecution. One foreign traveler commented that games of chance "help to get the centavos out of the Indian pocket" (O'Shaughnessy (1916) 87). Other foreign visitors described the national lottery but assured readers that there were many other forms gambling forbidden by the government (Knox (1890) 467) and often played brazenly in the *zócalo* because Mexicans "are born gamblers" (Carson (1914) 65). Like banditry, the government failed at curtailing betting, games of chance, and other forms of illegal gambling.

4. Domestic Order

During most of the colonial era, ecclesiastical officials handled cases pertaining to marriage, family, and sexual honor. The affected party pressed charges, and the church ruled on the case. With independence, the civil government subsumed jurisdiction over matters of domestic order and family honor. In fact, the 1871 Penal Code divided particular crimes into fifteen categories, including a section termed *"Delitos contra el orden de familias, la moral pública y buenas costumbres"* (Crimes against family order, public morality and good customs). Seemingly private legal matters within families were linked with affronts against public morality and good customs. The Code intertwined the

domestic and public order that allowed civil officials to intrude into the private sphere of families in the interests of ensuring public order. In fact, this set of crimes is most similar to colonial legal ideology because social rights or the protection of patrimony trumped individual rights (Szasz (2007) 70). Crimes in this category included adultery and bigamy, crimes against persons and families but sufficiently scandalous to involve the government in their prosecution. Public indecency, the corruption of minors, and sexual crimes such as the *estupro* (deflowering or rape) and *rapto* (abduction by seduction, often elopement) rounded out the list of crimes against domestic order. Honor was the essential variable here as family honor rested on the patriarch's ability to control the sexuality and moral comportment of family members, especially wives and daughters.

In fact, most of the offenses in this category challenged patriarchal authority, but did not include crimes of the patriarch against his dependents. Indeed wife beating, disliked but long condoned by the church and state, was codified as a common crime (Wasserman (2000) 139). At the same time, the 1871 Penal Code stated explicitly that physical assault (*lesiones*) was an appropriate response to correct aberrant sexual behavior of wives and daughters, but the significant positive change here was that domestic abuse was classified as a regular crime which theoretically gave women power to fight it in court. If a husband physically injured his wife after catching her in the act of adultery, she could charge him with assault, but his sentence would be one-sixth of what would be meted out for the same crime in the absence of the infidelity (CP (1871) Art. 534). Fathers who injured daughters caught having illicit sex could not receive more than one-fifth of the penalty (CP (1871) Art. 535). Punishment ranged from eight days to six years depending upon the severity of the injury, for example failure of an organ, loss of a limb, or impotence (CP (1871) Art. 527). Husbands and fathers that caught their female family members in the same illicit activity and killed them also faced reduced penalties. Slaying an adulterous wife or her lover garnered the wrathful spouse four years instead of twelve years in prison (CP (1871) Art. 554). Murdering a daughter who lived at home, or her lover caught in the carnal act, got him five years instead of the customary twelve for simple homicide (CP (1871) Art. 555). Neither murder in this situation could be considered premeditated or garner the death penalty.

Adultery as criminalized under the 1871 Penal Code showed subtle differences from its prosecution in colonial times, but women came out on the losing end again. The colonial church expected husbands and wives to uphold fidelity, but would grant legal separation in the case of adultery after first attempting to reconcile the couple. Arrom argues that some level of acceptance existed among wives that their men would stray from the marital bed. Indeed if they sought divorce it was rare that adultery would be the only grounds for their plea (Arrom (1985) 242). She found that, like men, women sought sexual liaisons outside marriage and endeavored to keep such affairs secret (Arrom (1985) 243–4). Secular courts took over the matter of divorce in 1859 and the 1870 Civil Code restricted the circumstances in which adultery by the husband would be grounds for divorce. Adultery in the 1871 Penal Code demonstrated the codification of a sexual double standard as well. If a married woman committed adultery she faced two years in prison. A married man only faced two years if he had sex with another woman in the conjugal home (CP (1871) Art. 816). Adulterers could lose custody of their children (CP (1871) Art. 817). A married woman could only bring a charge of adultery if her husband had sex with another woman in the home, with a concubine, or his adultery scandalized someone else in addition to the wife (CP (1871) Art. 821). Husbands had no conditions on pressing a charge of adultery against their wayward spouses. Likewise,

in 1883 President Manuel González modified the code in the case of double adultery. If a married man and married woman had illicit sex, the act would be considered a fourth degree infraction which could increase prison time. The modification let the man off the hook by stating that if he was unaware that his lover was married and he had sex with her outside his conjugal home he would only be subjected to a one year prison sentence (CP (1871) modified in 1883 Art. 816). The courts could give betrayed wives some recourse against their husbands to make sure he contributed to his children's welfare but, in reality, the Code revealed the double sexual standard that condoned male extramarital sex as long as it did not cause undue public scandal.

Communities had their own methods of dealing with individuals who overstepped the limits of popular propriety and good custom. While society condoned a man having extramarital lovers, if he abandoned his conjugal duties of support or flaunted his dabbling with his mistress, the community acted. Public humiliation was an effective tool, one the Inquisition used to censure deviant behavior by having the condemned wear placards or conical hats to mark them as moral deviants. Hence, when Tomás Bazán foolishly pressed an assault charge against his estranged wife and angry daughter, it came out in the testimonies that he openly paraded his mistress through the streets of his barrio much to the horror of his wife's friends and allies. Summoning wife, Eligia Escobar, and daughter, María Bazán, the angry women exacted a vigilante moral justice to humiliate publicly Bazán and his surprised mistress, each receiving blows, kicks, and insults from the group. In this case, the women rallied together to shame him, just as his public flaunting of adultery shamed them. The judge dropped the case, suggesting that he may have tacitly approved of the women's actions to censure behavior that caused public scandal (Sloan (2008) 108–9). Public humiliation served as an effective method of enforcing social order and the women's actions, while a crime of assault, also served to restore community peace and thus public order. Burning effigies, uttering satirical verses, parading offenders through the streets with signs announcing their affront, or suffering public and raucous verbal and physical attacks from neighbors, worked effectively to shape and impose popular mores (Beezley (2008) 42–45).

5. *Usos y costumbres*

The 1871 Penal Code endeavored to wield jurisdiction over crime in any state or any locale, but scholars have shown that *usos y costumbres* (traditional, customary law) often served as the first resort of *alcaldes* in small pueblos and villages. Customary law, which had its roots in the colonial era, formed part of the community's moral economy that comprised a set of responsibilities and rights, a balance between authority and obedience, and morality and causality. In other words, it formed a body of ideas and norms known and used by all. It governed the election of village officials, the assignment of land tenure and irrigation rights, marriage customs, and the settling of community disputes. *Usos y costumbres* had also been used to ward off expanding national government authority and influence, especially in indigenous communities (Chassen-López (2004) 279–314). Local institutions may have been the choice for many rural complainants, but those who failed to receive the justice they desired turned to government court systems. For example, one father expressed anger that his village *alcalde* held his daughter's seducer in jail for just three days and then let him go. The father traveled to Oaxaca City to charge the seducer with *rapto* and succeeded in getting the young man a sentence of four years (Sloan (2008) 51–2). Studies have shown that women were disadvantaged

under customary law and sometimes sought justice under the articles of the Penal Code.[4] Family harmony provided the root of community harmony, and while village elders did not condone domestic violence they recognized that a husband had a right to reasonably "correct" his wife and children. Members also accepted a notion of a "patriarchal pact" where husband and wife had a set of mutual responsibilities and obligations (Stern (1995) 82). Community members could ignore domestic violence until it reached the level of public scandal but, in most cases, *alcaldes* opted to reconcile spouses to restore harmony. Some intrepid women leaped over community rulings and sought redress from abusive spouses and in-laws in the secular courts (Sloan (2008) 55–6).[5] They did not always get the justice they sought and some scholars argue that women fared worse after independence under liberal laws (Kanter (2008) 108). It may be that the church protected women, at least placing them in temporary custody (*depósito*) away from abusive spouses, although some women considered this a prison sentence (Sloan (2008) 76).

The abolition of honorific titles and recording of race in criminal and civil documents was indeed a progressive act, nevertheless some scholars have argued that indigenous people fared worse after Independence when the ideal of the two republics faded into one. The Crown provided protections for Indians, so that they could not be prosecuted before the Inquisition because they were new Christians, people of child-like abilities. Indigenous peoples also governed their villages almost autonomously by the guidelines of *usos y costumbres.* Independence theoretically removed those protections but the Code reveals some interesting colonial holdovers. Colonial Spaniards long viewed the indigenous as prone to drunkenness, which they also believed led them to lose their already insufficient faculties and commit the most vicious crimes (Taylor (1979) 42–4). In nineteenth-century Mexico, inebriation remained an extenuating circumstance to soften culpability and punishment, but was also an expected condition of the lower classes (indigenous and mestizo alike) (CP (1871) Art. 34).

6. Honor and Judicial Loopholes

Nineteenth-century jurists provided loopholes to temper or even eliminate criminal responsibility. Understandably, deaf mutes and the insane were exempt from criminal prosecution as it was believed that they lacked discernment to know right from wrong. Jurists viewed minors under fourteen years of age as a special group as well, and the law exacted a different process and penalty depending upon their age and level of moral acumen (Blum (2001)). If you committed a crime during a drinking binge and you were not a habitual sot, the law absolved you of criminal responsibility although you could face a civil suit (CP (1871) Art. 34). Being deaf and blind, a child, or drunk gave the individual special dispensation, but so did the defense of personal honor. Article 34 mandated that if an individual committed a crime in defense of his person, honor, property, another person or his/her honor, or in self defense against imminent, violent aggression s/he was excused from criminal culpability unless his/her accuser could prove otherwise. The code did not excuse crimes committed by offended persons that sought to avenge a past slight; although in practice, such acts were exonerated by judges (Speckman Guerra (2006) 1431). When fourteen-year-old María del Pilar Moreno avenged her father's murder by shooting his fellow senator and killer, Francisco Tejeda Llorca, on the street in front of his house in 1922, she became an instant cause célèbre. Remarkably a jury acquitted her, in effect, sanctioning women to employ violence to defend their honor in the pursuit of justice (Piccato (2009) 143). In

another case, a jury exonerated beauty queen, María Teresa de Landa, for murdering her husband. De Landa had heard news over the radio that her husband, Brigadier General Moisés Vidal Corro, had not divorced his first wife and hence their marriage was a sham. The former beauty queen confronted her "husband", he acted unconcerned, and she "grabbed his pistol and pumped him full of lead" (Macías-González (2009) 215). Like the vengeful senator's daughter, de Landa and her attorney played up her femininity and her damaged honor. During her trial she acted the mourning widow and behaved with the decorum expected of a woman of respectable society. Her lawyer also portrayed her as an elite daughter of the most pure and respectable family who had been duped and dishonored by a social inferior. Not surprisingly a popular jury acquitted the ex-beauty queen, probably because jury members drawn from society were apt to exonerate individuals who killed to defend their honor, especially if they were beautiful and from upright families (Macías-González (2009) 238–9).

María Villa was beautiful but lacked the respectable family ties of de Landa or Moreno. A prostitute caught in a love triangle in 1897, Villa barged into her rival's room and shot and killed her. In Villa's trial she would claim that the victim, Esperanza Gutiérrez, had offended her in front of others on more than one occasion. She would go on to claim her right to defend her honor and that her act was the result of blind passion not premeditation. Her jurors were skeptical that she had any honor to lose and, with the prodding of a judge who repeatedly highlighted her bad reputation and sinful ways, they handed down a 20 year sentence. Clearly the defense of honor did not exonerate all Mexicans. They may have been equal before the law in rhetoric but judges and juries decided who had a claim to honor in the first place. In María Villa's case, she may have worked in a first class brothel but her occupation placed her in a category of *mala fama*. *Mala fama* was an aggravating circumstance for women under the criminal categories of infanticide and abortion (Arts. 573, 584) and if they committed either of those crimes they faced the possibility of stiffer penalties. If an unmarried woman hid her pregnancy, had a good reputation, and aborted her fetus, she faced a lighter sentence of two years than a married woman who hid her pregnancy. She received five years (CP (1871) Art. 573). Men were not censured more severely for *mala fama*, at least under the provisions of the Code. Again, existing social mores, in this case the sexual double standard, shaped the codification of laws that pretended to be egalitarian.

7.   Some Final Considerations

Mexico's first national penal code was fifty years in the making but it heralded the triumph of liberalism after decades of political turmoil. Certainly Mexicans felt the shift from colony to republic. The 1857 Constitution and the Penal Code of 1871 that followed guaranteed them personal liberties that they lacked before. In their spiritual lives, they could utter blasphemous words, engage in sodomy (as long as it did not provoke public scandal), and enjoy sexual relations for other reasons than procreation without fearing the clutches of the Holy Inquisitor. Whereas the Church prosecuted fornication, nineteenth-century liberals did not. In fact, sexual preference and sexual acts were mostly off limits unless they involved minors. Yet the century was not an era of libertine sexuality. Social mores still dictated proper sexual behaviors—mainly sex between man and woman—but previously "aberrant" sexuality like homosexuality, sodomy, and fornication were decriminalized. The courts may not have intervened but, like the case discussed above of the adulterer punished by a mob of women on the street, the community

sometimes stepped in to sanction sexual deviants. Ivonne Szasz confirms that "Mexican codes have been indifferent to sexual 'disorder' except when it offends public morality or 'correct' customs" (Szasz (2007) 73).

The 1871 Penal Code left little room for paternalism on the part of judges. This was an improvement over colonial times, but Buffington argues that the 1931 Code oozed paternalism (Buffington (2000) 110–11). Sentencing was clearly defined based on the severity of the crime and the presence or lack of either aggravating or extenuating circumstances. Mexicans, regardless of their class or gender, could press charges, argue their case, call witnesses, and often expect to receive justice in nineteenth-century courtrooms. However where they fell in the categories of "vice" and "virtue", in José María Morelos's words, also determined their success with judges and juries—who were after all human and shared a set of values and mores, many of which were holdovers from the colonial era.

Notes

1 Several studies have documented the increasing interference of the Mexican state in family lives, especially working class families. For a sampling see Lee Michael Penyak, "Criminal Sexuality in Central Mexico, 1750–1850," (Ph.D. Dissertation, University of Connecticut, 1993); Silvia Marina Arrom, *Containing the Poor: The Mexico City Poor House, 1774–1871* (Durham, NC: Duke University Press, 2000); Pablo Piccato, *City of Suspects: Crime in Mexico City, 1900–1931.* Durham, NC: Duke University Press, 2001); Ann S. Blum, "Conspicuous Benevolence: Liberalism, Public Welfare, and Private Charity in Porfirian Mexico City, 1877–1910," *The Americas* 58, no. 4 (July 2001); Cristina Rivera-Garza, "The Criminalization of the Syphilitic Body: Prostitutes, Health Crimes, and Society in Mexico City, 1867–1930," in Carlos Aguirre and Gilbert M. Joseph, eds., *Crime and Punishment in Latin America* (Durham, NC: Duke University Press, 2001); Elisa Speckman Guerra, *Crimen y Castigo. Legislación Penal, Interpretaciones de La Criminalidad y Administración de Justicia, Ciudad De México, 1872–1910,* (Mexico City: El Colegio de México, 2002); and Kathryn A. Sloan, *Runaway Daughters: Seduction, Elopement, and Honor in Nineteenth-Century Mexico* (Albuquerque: University of New Mexico Press, 2008).

2 Juárez issued an extraordinary decree in May 1871 which suspended the individual guarantees of highway bandits and kidnappers for one year. If caught they faced automatic execution without trial. See Frazer, 54.

3 If a man abducted a woman to have sexual relations with her, it was not considered kidnapping (*plagio*) but *rapto* or the abduction of seduction of a virgin. The underlying ideology was that kidnapping chaste women for sexual purposes was an affront against the honor of the patriarch and the family. If the man married her, paid a dowry, or convinced the judge that she was not virginal, he faced no penalty. Clearly, abducting women (even without their consent) was not considered as serious as the capital crime of kidnapping.

4 The subjugation of women under *usos y costumbres* warrants attention today. The Zapatista Autonomous Municipalities have formed new customary law to change some of the practices that left women with little or no voice in who they married, how they protested domestic abuse, or received land rights. See Shannon Speed, Rosalva Aída Hernández Castillo, and Lynn Stephen, eds., *Dissident Women: Gender and Cultural Politics in Chiapas* (Austin: University of Texas Press, 2006).

5 Colonial subjects could leap frog over *alcalde mayores* as well. Dissatisfied with their rulings, complainants could appeal to the Audiencia or the Juzgado de Indios. See Kevin Terraciano, "Indigenous Peoples in Colonial Spanish American Society," in *A Companion to Latin American History,* edited by Thomas H. Holloway (Malden, Mass: Blackwell Publishing, 2008), 129.

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Conquering the Environment and Surviving Natural Disasters

JAMES A. GARZA

Mexico entered the republican century amid an environment of turmoil and bloodshed. The Hidalgo Revolt in 1810 sparked a series of events that culminated in independence in 1821, but political divisions ensured decades of conflict and turmoil. For many Mexicans droughts, floods and storms presented equal challenges. Despite several wars and invasions, long-term population growth signaled increases in agricultural production, especially in the last quarter of the century. Moreover, advances in observational technology translated into more and better reporting of disasters. Spurred by ecological calamity and the need to possess the environment, leaders embarked on ambitious programs of national development (Craib (2004) 95). Two of the most significant were the construction of the Porfirian rail network and the completion of Mexico City's *desagüe*, the drainage system. This chapter presents a survey of disasters and development, two factors that shaped nineteenth-century Mexico.

1.   Progress and Railroads

Mexico's development after independence was defined by the railroad. As a visible symbol of capitalist development, railroad projects received high priority, although frequent changes in administrations and difficulties with financing, not to mention several invasions, slowed down any significant advances until the last quarter of the nineteenth century. Previous to that, roads served as the primary means of travel and transportation, although their conditions were primitive. In fact, in 1877, half of the federal roads were suitable for animal traffic only (Coatsworth (1981) 21). Interest in railroad development began soon after independence, with 48 concessions approved by 1872 but only a few completed. The most important goal involved linking the main port of Veracruz to Mexico City. The concession was granted in 1837, but by 1850 only 11.5 kilometers of track had been completed from the coast to El Molino. Difficult geography proved to be a formidable obstacle, aside from political and economic barriers. River gorges, towering mountains and desolate plains slowed down development, with the biggest obstacles

being the steep grades along the eastern escarpment of the Sierra Madre Oriental. (Ortiz Hernan (1970) 84–87, Coatsworth (1981) 17)

The restoration of the republican government after the French Intervention (1862–1867) was followed by an increase in foreign investment and railroad construction. The Mexico City–Veracruz Railroad, for example, was finally completed in 1873, but it was a costly and heavily-subsidized venture. After Porfirio Díaz seized power in 1876, overall trackage increased, from 640 km in 1877 to 5,898 km in 1884 (Coatsworth (1981) 35, Cohen (1999) 129). By 1910, Mexico possessed 20,000 km (Garner (1995) 341). Foreign funds played a major role, but the passage of the 1883 land law was crucial, since it allowed for the expropriation of private property for public works, including railroads, roads, canals, rechanneling of rivers, dikes and related facilities (Van Hoy (2008) 15). The completion of other major lines followed, especially to the northern border with the United States and in the south along the difficult Isthmus of Tehuantepec.

Railroad development rested on the acquisition of land, primarily properties collectively owned by Indian communities. Developers not only utilized new laws, such as the 1883 code, but also existing legal frameworks such as the Reform Laws. Thus, developers easily acquired village lands that had been broken up for individual sale. These developments did not go unchallenged. John Coatsworth has noted the presence of localized, rural violence in regions that adjoined railroad lines, indicating that the acquisitions were often resisted. Nevertheless, some of these episodes had other causes as well. The conquest of the terrain by the railroad had become, by the late 1880s, a normal feature of the nation's growth along with hacienda expansion and other forms of development (Coatsworth (1981) 149–174).

Railroad construction was not by any means completely detrimental to the rural population. On the contrary, as Teresa Van Hoy has demonstrated, some villages and their inhabitants benefited enormously. In southern Mexico, along the Isthmus of Tehuantepec, railroads facilitated the conquest of the harsh terrain by providing a safe path for poor Mexicans to travel, either in economy cars or on foot. In some areas, for instance, railroad bridges were the only safe routes across gorges and rivers. In other cases, villagers demanded, and often received, generous payments for their properties. Rural peoples also pitted developers against local officials in order to exact the best concessions. Finally, railroad construction provided villagers with additional income since developers preferred cheap local labor rather than expensive imported workers (Van Hoy (2008) 49–171).

The belief that railroad development would solve the country's ills was one of the driving tenets of the Porfirian government. Government officials dreamed of transforming Mexico into a modern nation and launched numerous projects that involved intensive capitalist investment along with scientific analyses of the environment and selective repression of the indigenous population. Economic considerations dominated, as with the dredging and modernization of the port of Tampico (Kuecker (2003) 91–102). The process was long and arduous. Yellow fever and other tropical coastal disease were common obstacles. Further, maps had to be updated first in order for the landscape to be transformed. For this purpose, Porfirio Diaz established the Geographic Exploration Commission in 1877. Dominated by the army, the commission sent out surveyors and produced maps for both security and development-related purposes. The resulting map collection greatly aided the Porfirian government in strategically extending its reach and acquiring information about local conditions and terrain that would prove invaluable in designing future projects (Craib (2004) 127–192).

2. El Gran Desagüe

Perhaps no other project defined the republican era better than the drainage of Mexico City's lakes: the desagüe. Planned and implemented to alleviate environmental conditions that posed a threat to public health and commerce, the desagüe had deep roots stretching back centuries. Since the founding of the colony, Mexico City's administrators had grappled with the perennial problems of flooding and sanitation. Both were interrelated; floodwaters inevitably carried waste. It was not possible, therefore, to build a sanitation system without solving the floodwater problem. However, it was not until the Bourbon era that reformers seriously implemented measures to clean up and drain the city. These efforts were principally focused on ridding the capital of all elements of filth and disease, both thought to be caused by miasmas or stenches that were believed to be given off by wastewater and rotting fruits. The Independence era interrupted the momentum and it was not until the mid-nineteenth century that the first serious work was carried out. As with railroad construction, the twin nightmares of war and political chaos slowed down efforts. Nevertheless small triumphs occurred, such as the formation of the Superior Sanitation Council in 1841. It was not until 1891 that a comprehensive sanitary code was enacted and a sewage system in Mexico City soon followed. By the end of the century, not only had sanitation become an integral part of the government's conception of the state, but it had also contributed to how elites viewed the poor and their environment (Agostoni (2003) 1–4, 20–21, 130–133).

It was during this era that Mexico City's elites became convinced that immorality was linked to disease and filth. Race and class had been injected into the discourse about sanitation. The link was manifested clearly, according to this viewpoint, in the capital's large underclass, many of them of indigenous origin. As the Porfirian regime tried to educate Indians and eliminate their customs, it also invested enormous energy toward removing one of the most visible reminders of the Indian past, the lake system. Planners did not completely understand the long-term effects of manipulating Mexico City's watershed. Flood and disease control, arguably, were their principle concerns. Couched in the language of hygiene and safety, the desagüe nevertheless represented an assault against an indigenous environment and its traditional wards. Although some elites blamed the Spanish, not the Aztecs, for destroying a pristine world, the remnants of the lakes were deemed a threat that needed control or elimination (Agostoni (2003) 31–34).

From the first recorded massive flood in 1555, Mexico City's Spanish rulers had tried to replicate the Aztec-era defenses against flooding, notably with the construction of a dike. This effort and other similar projects did not address the longstanding problem, namely of what to do with all the water from excessive rain. Transporting the water out of the city was the obvious answer, but technology, and costs, defeated any sustained effort. Thus, the capital suffered through excessive flooding in 1607, 1629, 1674, 1714, 1732, 1747, and 1795. The Hidalgo Revolt stalled efforts but, despite independence in 1821, progress remained elusive. In the early 1830s, a flurry of activity attempted to revive the project but political chaos prevented any serious efforts to tackle the issue. Ironically, it was the U.S. Army that brought the next serious attempt, but the engineering study went no further when the North American forces withdrew after the signing of the Treaty of Guadalupe-Hidalgo (Perló Cohen (1999) 40–52).

It took another foreign invasion, this time by the French under Napoleon III, to breathe new life into the desagüe program. In 1856, the Imperial government asked for new proposals. The winning idea, by engineer Francisco de Garay, called for an open canal

originating in San Lazaro and a tunnel through the Ametlaco mountains, which would then empty floodwaters into a canyon and inevitably to the Pánuco River and the Gulf of Mexico. A complex series of canals would complement the project. The project commenced in 1867 but the fall of the Second Empire led once again to postponement, even though excavations had already been started. The restoration of the republic meant slow progress, however, with any significant advances paused until the financial bedrock of Porfirian Mexico could be established (Perló Cohen (1999) 52–58).

At the beginning of the Porfiriato in 1876, Mexico City's hygienic condition was abysmal. Constant flooding, coupled with poor sanitation, led to the sight and smell of sewage waters flooding the city streets. From 1876 to 1877, a total of 12,647 residents died, many from diseases caused by poor sanitation. Compounding the problem was the elevation of Lake Texcoco, the primary repository for raw sewage. Since the drains into the lake were lower than the lake's elevation (especially during periods of drought) the drainage was ineffective. Once there, sewage waters did not circulate but festered, causing many to label the lake as the capital's biggest health threat (Perló Cohen (1999) 61–63).

To combat this, Díaz established a sanitation commission and brought in de Garay as director of the desagüe. Work began at once, but Porfirian politics resulted in de Garay's eventual replacement by the engineer Luis Espinoza, who modified the project. The administration of Manuel Gonzáles (1880–1884) gave the desagüe a low priority, but Díaz's return in 1884 restored its importance since he considered Mexico City to be the showcase of his regime and the most visible symbol of order and progress. Nothing, including traditional Mexico, would stand in its way (Perló Cohen (1999) 63–78).

In 1886, Díaz authorized a new committee, the Junta Directiva del Desagüe, to oversee the drainage program (Agostoni (2001) 126). Moreover, the government proceeded not only to drain the lakes, but also to acquire water rights for a growing population. As Porfirian Mexico City expanded its web of control, traditional communities near lakes Chalco and Texcoco became the main targets. The Junta operated with almost full autonomy and contracted with foreign firms and acquired new loans. For the main project, the Junta turned to the British firm Pearson and Sons. Foreign technology was crucial; without the importation of advanced dredges, for instance, the project would not succeed. Although some previous work would be incorporated into the re-energized effort, the construction of a main canal and a drainage tunnel through the mountains was crucial. As a result, Díaz authorized the acquisition of any necessary land (Agostoni (2001) 127–128).

It should be noted that the desagüe was planned and implemented in an environment of mounting pestilence. Díaz considered the entire effort to be a matter of life and death for the capital's residents and many of them agreed with his assessment (Perló Cohen (1999) 83–87, 113). If a few poor Mexicans were displaced, this was considered a small price to pay for solving a problem that had made Mexico City one of the world's most dangerous cities in terms of public health. For example, in 1900 the capital's infant mortality rate stood at 40 percent. Four in ten babies did not reach their first birthday (Miller (2007) 43). The dreaded dust storms from Lake Texcoco, the *tolvaneras*, were blamed for all sorts of gastrointestinal and respiratory disorders. The lake, which lay astride the route of the planned canal (hence the need for dredges) functioned, in essence, as a giant toilet with no drain (Tortolero Villaseñor (2004) 137–140).

The drainage of Lake Chalco, in reality, proved to be detrimental in the long run to the city's health. Unlike Texcoco, Chalco was a freshwater lake and supported one of the valley's unique ecosystems. Its conquest was not a matter of survival, but of profit. The Díaz government planned to increase the city's food supply and saw a drained lake bed as desirable farmland. Accordingly, the regime contracted with two Spanish brothers, the Noriegas, to drain the lake. With vigor and ruthlessness, the Noriegas forced many communities along the lakeshore to relinquish their water and fishing rights. Villages that resisted had their agricultural fields flooded with water intentionally released by dams managed by the Noriegas. The region's traditional farming methods were tossed aside in favor of more orderly projects. The de-Indianization of the capital and its environs thus proceeded with little fanfare (Tortolero Villaseñor (2004) 130–133).

In contrast, the desagüe was publicly inaugurated on two dates. On September 15 1899 the collector gates in San Lazaro were opened in an effort to coincide with Díaz's birthday as well as with the Independence Day celebrations. On March 17 1900, finally, the Grand Canal was opened. Official and informal excursions were launched in hopes of seeing one of the wonders of the Porfirian nation. Yet despite all the speeches and hard work, the capital's woes would not end. Floods would continue, including one in 1904. More ominously, mortality rates increased, despite a small drop in 1901. While every effort was made to account for elevation and advances in technology, planners failed to take into account population growth. Engineers had planned for the canal to service the needs of an urban population of 350,000. In contrast, the city's population in 1910 stood at approximately 471,000. Since the canal would inevitably carry wastewater, population growth had negated its benefits (Perló Cohen (1999) 228–232, 250–260). With a sewage system barely able to meet the needs of the poor and growing colonias, the desagüe became victim to one of the byproducts of modernity: population growth. By the last decade of the Porfiriato, rural population displacements had flooded Mexico City with migrants who overwhelmed the system. Further, as Mexico City's population grew, more water wells were drilled, causing the basin's water table to shrink and buildings to lean and topple. In fact, the drainage problem would not be solved until 1975. One of the most noble and ambitious projects in the end literally undermined the foundations of the city it was created to serve (Miller (2007) 144–147).

3. Natural Disasters

Weather-related natural disasters during the nineteenth century are well-documented events thanks to three developments: increased agricultural production, urban growth and advances in observational technologies. As Mexico entered the republican period, natural population growth meant an increase in farming, though production remained conservative until the 1870s. Urbanization was also slow, but increases in the national birth rate (made possible through a decline in political violence) produced a corresponding rate of urban growth. Finally, the 1870s saw an increase in foreign investment and, as a result, growth in imported technologies as well as national initiatives to use them. In other words, as more people farmed in the countryside and lived in cities, records of disaster increased in frequency.

In the immediate years after the War for Independence, which saw mines flooded and haciendas destroyed, the new nation could ill afford major droughts and their ill-effects. In Zacatecas and Queretaro, for instance, the years between 1826 and 1828 brought a drought that left farms parched and cattle dead (Escobar Ohmstede (2004) 50). Further

south, in Mexico City, a period of prolonged heat during May and June 1828 resulted in water and grain shortages, bringing pleas to bring out Nuestra Señora de los Remedios from her shrine outside the capital so that the city's population could ask her for relief. Although rains returned by late June, the damage to local cattle production had resulted in the closing of 47 butcher shops. The added political chaos between federalists and conservatives contributed to an overall sense of panic in the city (Escobar Ohmstede (2004) 50–51).

Thus the weather-related disaster pattern for the nineteenth century was established early on: drought often followed by flood-producing rains, both worsened by political events. The victims were rural farms and major ports and cities. In the summer of 1831 massive rains drowned livestock in Veracruz, resulting in losses totaling thousands of pesos. The rains may have also contributed to an infestation of worms in that state's corn fields. Peasants were usually the hardest hit. In Oaxaca, a hurricane in September 1831 devastated portions of the state. Floods and mudslides killed at least 115 people and led to the outbreak of disease. Orchards and farms were flooded and several bridges were destroyed. The opposite prevailed in Coahuila and Texas, where a year-long drought destroyed crops. It seemed that 1831 was a particularly destructive year as many of the northern departments reported drought conditions, while in distant Yucatán a plague of locusts devoured crops. The bad weather continued the following year, leading some municipalities in the north to authorize the purchase and distribution of foodstuffs. The rural population coped but food shortages and price hikes produced the occasional riot and took their toll on a populace already fearful of violence (Escobar Ohmstede (2004) 55–57).

At mid-century, political events conspired to bring even more misery to a population already suffering the effects of bad weather. In Yucatán, Mayans began to migrate from region to region searching for food. A few years later the Caste War (1847–1855) would add to the devastation. Not even Mexico City escaped the toll. In September 1848 the capital's residents, already reeling from the effects of the war with the United States, suffered devastating floods when the Churubusco River broke its banks. City streets were flooded with mud and water sources were contaminated. The 1850s brought worse news. Veracruz, Campeche, Yucatán, San Luis Potosí and several other states reported corn shortages. With no local seed available, officials responded by purchasing from available suppliers, including the United States, but costs were high. Clearly decades of political indecision, rebellion, and war had taken their toll on the food supply system (Escobar Ohmstede (2004) 65–71).

One peculiar natural disaster during this period took the form of swarms of locusts that seemed to descend with regularity on the Mexican republic. In May 1854, hordes of the devastating insect flew out of Central America and descended on Oaxaca, spreading fear and terror. On June 1 of that year, a swarm descended on the state capital, occupying a miles-long stretch of territory and staying three hours before departing, apparently gorged on trees and plants. The following October locusts were also reported in Veracruz. Their appearance not only caused great alarm in rural areas but increased corn prices as well. Near Juchitán in the Isthmus of Tehuantepec, a stretch of approximately 75 miles running from east to west was attacked by the insect in 1854. All crops of value were lost (Escobar Ohmstede (2004) 81–82).

While archival records note an alarming number of droughts, frosts, and floods, in reality these events were part of everyday life in the nineteenth century. Moreover, political events and foreign invasions, such as the War of the Reform and the French

Intervention, worsened everyday conditions in localities already suffering from the effects of bad weather. Yet Mexicans persevered, asking for help from officials and even from above, as in Guanajuato in August 1863 when locals participated in a religious procession headed by the image of la Nuestra Señora de Guanajuato in an effort to ask for rain. The effort apparently failed since the drought extended into 1864, leading some to call it the "Year of Hunger." The severe drought managed to dry up local lakes, causing shortages of food so widespread that the Catholic Church opened public kitchens (Escobar Ohmstede (2004) 92).

On occasion devastating weather events disrupted everyday life so severely that entire communities were destroyed. In 1867, a severe hurricane made landfall on the coast just south of the mouth of the Rio Grande. The storm decimated the port of Bagdad, Tamaulipas, a settlement that had profited from the shipment of southern cotton to help finance the Confederacy. The storm also devastated Matamoros and its Texas counterpart, Brownsville. Perhaps due to resentment over the region's political role during the French Intervention, donations from central Mexico were sparse. One report even indicated that wealthy hacendados had refused to contribute a single peso. The death rate was conservatively estimated at 26 percent, but this was probably an understatement because storms such as this one usually swept victims out to sea. Bagdad would survive, but a future storm in 1889 would permanently destroy the city (Escobar Ohmstede (2004) 97).

Another major hurricane struck the Baja Peninsula and Sonora in October 1868, decimating several towns. The community of Mulegé, Sonora was annihilated by flooding while Alamos reported three days of continuous downpours. Ships were washed ashore or capsized while residents in Loreto, Baja California took refuge in the only building capable of withstanding such a storm, the church. The devastation was severe enough for the Sonoran government to temporarily exempt the region from taxes. The hurricane's severity was made even worse by the region's general isolation and distance from major population centers. Indeed, reports about distant disasters made their way slowly to Mexico City, at least until telegraphs were strung across the country. Yet for many isolated communities, some of which did not see electricity until the 1940s, a weather disaster meant that the local population would have to fend for themselves until help arrived, if it did at all (Escobar Ohmstede (2004) 100).

In contrast to droughts, which were long-term episodes that allowed government and religious officials to respond with some planning, floods were unpredictable events. Mexico City was commonly flooded since the capital, surrounded by a ring of mountains, possessed little in the way of effective flood control. As noted previously, flooding (and the overflow of sewage) was a major concern only partially alleviated by the completion of the Grand Canal to transport stormwater outside the city. While health concerns related to flooding dominated Mexico City's politicians, in agricultural zones flooding could easily destroy a harvest of commercial crops. In September 1868 heavy rains forced several rivers and streams to breach their banks in the Laguna region in Coahuila, leading to the loss of the cotton harvest from several haciendas. Towns were flooded and the loss of life was substantial. Floods such as these delivered a double-blow, since washed out soils prevented planting the following year (Escobar Ohmstede (2004) 99).

As Mexico entered the 1870s, successive liberal governments increased scientific observation and national development. Record keeping and internal communications improved. Natural disasters were not only better documented but, as population levels and material development increased, became more destructive (Lomnitz (2005)

377–378). For instance, a massive flood inundated Guanajuato on August 20 1873 and drowned 54 people. Starting at around 6:30 p.m. the sudden downpour caused a local creek to breach its banks. One estimate recorded the financial loss at 156,000 pesos, a fortune at that time. The Lerdo de Tejada administration ordered 15 percent of the proceeds from a fair held in Mexico City to go to Guanajuato to aid the city. Three hurricanes or major storms also struck the republic during 1873. Matamoros, Tamaulipas was struck again on September 9, while Nuevo León felt the effects of a major storm blowing in from the Gulf in early October. In Oaxaca, a Pacific storm hit the Tuxtepec region in December. With the wealth of the Catholic Church diminished as a result of the Reforma's anti-clerical provisions, fundraising events coordinated through the local *jefe politicos* (local political administrators) were often the only means many communities had at their disposal to recover from the storms (Escobar Ohmstede (2004) 110).

The Restored Republic and the Porfiriato both signaled a renewed commitment to national unity and development. Unfortunately, the destructive effects of hurricanes on coastal areas meant that communications and infrastructure projects received severe setbacks that placed overall national economic health at risk. On September 3 1874 a hurricane made landfall near Matamoros, Tamaulipas and leveled numerous homes, especially in the Bagdad area. Telegraph lines in the zone were completely destroyed. Aid poured in from throughout the republic to provide some comfort. Another hurricane on August 12 1880 proved more destructive. More than 1,000 families lost their homes in Matamoros while scores of cattle drowned, their corpses polluting water supplies that were already inundated with salt water. Fortunately, the national government inaugurated the first railroad line between Matamoros and Monterrey, Nuevo León the following April, providing an important link whereby aid could flow into the city, which was still suffering the effects of the previous summer's storm (Escobar Ohmstede (2004) 113, 127).

During the 1880s record-keeping improved as new government agencies, such as the Central Meteorological Observatory established in 1877, begin to take increased notice of the destructive effects of storms, floods, and droughts (Porrua (1976) 1321–1322). Damages were still measured in terms of crop and livestock losses because of the predominantly rural society. Reports came with frequency. A freeze in Guanajuato in February 1881 produced widespread losses in local orchards. Indeed, the winter of 1881 was particularly harsh as many states, including Jalisco, Durango, Hidalgo, and Queretaro reported agricultural losses and deaths stemming from freezes and snowfalls caused by the frigid *nortes*. In October of the same year massive floods affected several communities in Nuevo Leon, leading to more reports of crop losses. From November to December 1882 a familiar menace, locusts, returned in force to Oaxaca, Veracruz, Tabasco, and Yucatán. Swarms covered forests and fields, leading to massive losses in corn, henequen, and cotton production. In Yucatán, the state government decreed that all citizens had to form local committees to combat the pests. The efforts were successful in some parts as locust infestations diminished. In Chan Santa Cruz (today Carrillo Puerto City), rebellious Maya of the Speaking Cross forbade anyone from harming the insects under penalty of multiple lashes. Instead, offerings of food were left in the fields for the creatures (Escobar Ohmstede (2004) 133, 135, 141–142, 148–149).

One of the major natural disasters of the Porfiriato occurred on June 18 1888 in the city of León, Guanajuato, nicknamed the Pearl of the Bajio. A massive cloudburst during the night produced a flood that destroyed half of the city. Approximately 1,400 residents died, with 30,000 left homeless. Whole families disappeared. The cost of the flood in

material terms was estimated at 1,500,000 pesos and included the destruction of the rail network to the city as well as local telegraph lines. As a result of the flood's effects, Leon lost its status as the second largest city in Porfirian Mexico. National committees and organizations, including the Roman Catholic Church, sent a total of half a million pesos. It remains to this day one of the most disastrous weather-related events in the nation's history, but is not unique as many rural communities suffered horrendous losses through similar floods. Yet Leon's prominence as an urban nexus (and for the Church a bastion of Catholic conservatism) guaranteed that the flood received national attention (Escobar Ohmstede (2004) 178–180, Porrua (1976) 1169).

Throughout the 1880s and into the 1890s the Porfirian government's ability to conduct analysis of long-term weather trends improved. Droughts seemed to be the major issue since food production was crucial to maintaining internal development. The year 1882 witnessed damage to corn crops from drought events, as did 1883, 1890, 1893, 1896, 1900, 1904, 1909, and 1910. The 1893 drought, which was caused by the El Niño weather phenomenon, gripped much of the central and northern sector of the country, leading not only to crop losses but livestock mortality as well. The problem was not the scarcity of food nationwide; there were ample supplies in some sectors. The problem was an imbalance of food distribution, likely the cause of poor coordination in transportation networks. Quite simply, Porfirian Mexico's railroad network functioned as an export system and could not deliver relief internally since its framework was projected outward toward its border cities and ports. Thus, many areas were not served by railroads, depriving them of the possible benefit of emergency aid (Davis (2002) 260, Escobar Ohmstede (2004) 222, Cosio Villegas (1965) 21).

4. Earthquakes and Volcanoes

Earthquakes have had political consequences. The 1985 quake that devastated Mexico City contributed to the fall from power of the official party, the Institutionalized Revolutionary Party or PRI, in 2000. The nineteenth century was no stranger to seismic events as several struck populated centers, leaving their mark in official records. Like droughts and storms, earthquakes are of more significance if their actions affect populations. What follows is by no means a comprehensive record of earthquakes; instead it offers a window into how severe and profound such events could be. For instance, in 1818, in the midst of great political change, a powerful earthquake known as the San Fernando Quake, struck Mexico City after midnight on May 30. Damage was extensive, especially to the city's psychology already reeling from war. As the quake toppled people out of bed, many were heard to utter "Santo Dios, Santo Fuerte, Santo Immortal, líbranos Senor de todo mal," a common supplication that found many speakers during those years (García Acosta & Suárez Reynoso (1996) 205, 219).

While prayers were not the best means of surviving earthquakes, they did bring comfort to those trying to cope with the terrifying events. In March 1834 a major quake struck Central Mexico and was felt as far as Veracruz and Puebla. In Acapulco, the quake set waves in motion and destroyed several homes. Witnesses reported that it lasted a total of five nightmarish minutes. While a scientific discussion of the cause of most seismic events is outside the scope of this essay, it should be noted that central and southern Mexico sit near the collision point of several geologic faults. Of more significance though is the human element. Earthquakes amplified the human cost of wars, epidemics, invasions, and political chaos, not to mention drought and flood events. From 1825 to

1841, for instance, earthquake activity in Oaxaca was pronounced, with several events. Unfortunately, so was smallpox. In 1837 a major temblor struck central Mexico, especially, in a line from Mexico City to Oaxaca. The Santa Cecilia Quake, as it came to be known, produced numerous damage reports (García Acosta & Suárez Reynoso (1996) 220, 224–225, 229).

Like hurricanes today, earthquakes in nineteenth-century Mexico were named, usually after the Catholic Saint or feast on which date the quake struck. Mexicans also named them after the damage they did to notable landmarks. Perhaps a form of psychology was also at play, since the names could impart a way to remember and mark the events. For example, on April 7 1845 a powerful earthquake known as the Senor de Santa Teresa, lasting three minutes, shook Mexico City, leaving ruptured pavement and damaged buildings in its wake. Contemporary reports leave us with impressive descriptions. Witnesses reported that the waves seemed to travel from west to east. In the aftermath of the initial event, debris littered the streets as damage to buildings, including the Church of Santa Teresa, was widespread. The quake was followed by two major aftershocks. Numerous persons died or were injured by falling walls. So widespread was the damage that homeless residents camped out in the Alameda (García Acosta & Suárez Reynoso (1996) 237–238, 260–264).

By mid-century earthquakes were increasingly seen as scientific phenomena, a reflection of advances in observational technologies. Earthquakes also increasingly damaged rail lines, which were multiplying in number. One notable example was the Holy Wednesday Quake, which struck Mexico City on March 27 1872, at 7:55 a.m. The quake lasted a total of 20 seconds but caused extensive damage, especially to the Tlalpan railroad. In Jalisco, a powerful temblor struck at exactly 10:20 a.m. on February 11 1875 near Guadalajara. The nearby town of San Cristóbal, situated northeast of the city, seemed to be the epicenter, for 70 residents out of a total population of 800 died, with many more injured. Observers from a scientific commission sent from Mexico City reported the town flattened with terrified villagers living in nearby fields (García Acosta & Suárez Reynoso (1996) 345–346, 359–361).

Earthquake damage also increasingly threatened health conditions. For instance, on July 19 1882, a major quake struck central Mexico, causing considerable damage to the Lake Texcoco area. The lake broke its barriers and flooded nearby cornfields with its fetid waters. Mexico City was struck again by a powerful quake on November 2, 1894. The Day of the Dead temblor caused numerous deaths and considerable damage to buildings, including the Teatro Principal. The telephone service was knocked out and even the seismograph in the Hotel Central broke. In Belen prison, inmates begged for mercy from God by shouting out their crimes in anticipation of death, while parishioners in the Basilica wept openly. Curiously, the division between "modern" Mexicans and more traditional citizens was evident in the streets, as observers reported that men from the humble classes knelt and prayed while men with bowler hats took out their watches to measure the duration of the event. As for the horses, perhaps their reaction was the most telling, for many of them simply knelt down with their legs open as wide as possible (García Acosta & Suárez Reynoso (1996) 404–407, 427–428, 474–485).

The last decade of Porfirian rule saw more earthquakes and some volcanic activity as well. On September 23 1902 the Volcano Santa Maria in Guatemala, close to Quetzaltenango, erupted, leading to considerable ash fall in neighboring Chiapas. The eruption was also accompanied by seismic activity and mudslides, which destroyed several communities in Guatemala. The situation was made all the worse by a hurricane that

struck the Tehuantepec coast. While volcanic activity in Colima was not considerable, earthquake activity along the Pacific coast was, as indicated by a powerful quake that struck Acapulco on April 14 1907. In Ayutla most of the buildings were toppled, with the death toll reported officially at 8 (García Acosta & Suárez Reynoso (1996) 550–583).

By the end of the century the Mexican government viewed earthquakes and other disasters with scrutiny as economic development became increasingly important to political survivability. While the responses of everyday Mexicans to disasters and development are varied, official attitudes became closely tied to the idea of national identity. Perhaps fittingly, on March 26 1908 a quake in Mexico City prompted one set of school officials to calm pupils down with a new tool: singing the national anthem in unison (García Acosta & Suárez Reynoso (1996) 591–593).

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Indigenism in General and the Maya in Particular in the Nineteenth Century

TERRY RUGELEY AND MICHELE M. STEPHENS

The matter of ethnohistory presents special challenges for anyone wishing to understand Mexico's nineteenth century. During the colonial period a caste system prevailed, one in which people were assigned roles according to their perceived ethnicity; even though Mexicans and Spaniards alike tended to be inconsistent about racial categories, the terms they used at least provide some approximation of practice. The twentieth century enjoyed greater anthropological awareness, and researchers had the advantage of approaching human subjects with the intention of exploring how their language and culture identified them as a people. In both cases, there is at least *something* to build upon.

What survives of the nineteenth century often appears calculated to frustrate historians. Two factors—profound state weakness and the marginalization and illiteracy of indigenous peasants—tended to limit recorded information, even though bureaucratic reporting at least tended to be more candid in those idealistic days. The period's notorious instability also helped to destroy much paperwork that might have clarified ethnic relations. In the era of the dictator Porfirio Díaz (1876–1911) the silence becomes more intentional than inadvertent. Under pressure to conform to the regime's goal of creating a uniform nation-state, local officials systematically excluded jarring realities from their reports. Indeed, rummaging through the pages of the district chiefs known as *jefes políticos*, one would sometimes never suspect that the nation contained Indians, Catholics, or even women. The overall tone of "all quiet" derived from an awareness that any bad news would fall against the bearer, and for that reason it was best to appease higher-ups with bland and seamless descriptions of local harmony.

Nevertheless, reality forced its way into the reports with sufficient regularity. When real problems did escalate into crises, it became impossible to conceal the particulars, including the profound ethnic divisions in the society. Peasant petitioners still managed to get in a word to jefes, governors, and even Díaz himself. Foreign visitors, some of them people of scientific background, also recorded their observations on the nation's cultural diversity. All in all, enough survives to flesh out what Porfirians and their

predecessors often worked to elide, and much still awaits in the reconstruction of nineteenth-century ethnohistory. What follows is a reconstruction of some of the overall contours of the time and place.

It would be a serious error indeed to suggest that the Indian peoples of nineteenth-century Mexico formed a homogenous group, either in culture or political orientations. Then as now, most indigenous groups fell into one of four major linguistic families. The vast collection of Uto-Aztecan tongues included Nahuatl (sometimes known today as Mexicano), Cora, Huichol, Pima, Tarahumara, and Tepehuan. The Mixe-Zoque consisted principally of those two languages, plus Popoluca. Matlatzinca, Otomí, Tlahuico, and Zapotec collectively made up the Oto-Manguean group. The fourth group, speakers of a Maya tongue, ranged from the Yucatec Maya (reasonably unified throughout the peninsula, perhaps owing the absence of geographical boundaries) to the Tzeltal, Tzotzil, and Lacandón of Chiapas and the Chontal of Tabasco. Beyond these major families stood, and stands, a collection of smaller isolates: the Hokan of Baja California, the Tarascan of Michoacán, Totonacas in Veracruz, Seri in parts of Chihuahua, and even an enclave of Algonguian-speaking Coahuilan Kikapoos, a group that migrated to Mexico to escape political and cultural incorporation into the expanding United States.

Whatever the deviations in verb root and sentence structure, certain threads of "family resemblance" do indeed connect the various societies. Most indigenous peasants lived by subsistence agriculture, but with a healthy adjunct of artisanry (textiles, pottery, rope, and so forth), animal husbandry, wage labor, and trade in petty commodities. Most were separated from the dominant culture, by choice or ostracization or both. Most Indian communities cleaved to a syncretic folk Catholicism that revolved around a *santo patrón* (patron saint), a lay prestige organization known as the *cofradía*, and the ceremonial year that enveloped both. Communal agriculture was also common. People did not necessarily work together in the same field, but communities practiced free access to unworked land within the confines of the ancient *fundo legal*, or land that the Spanish crown had guaranteed the village. Indian peoples typically solved their problems locally—as well they might, for centuries of experience had taught them that outsiders usually meant trouble. Communities were not necessarily closed; indeed, ties with nearby towns and land-owners were often critical for village survival, because the latter provided markets, much-valued commodities like metal tools, and loans and employment when needed. But Indian communities did maintain a long arm of distance from their more powerful neighbors. Spanish had made steady inroads since the eighteenth century, but the huge diversity of Indian languages still prevailed throughout the countryside, so much so that non-Indians growing up in rural quarters often spoke languages like Maya or Nahuatl as their mother tongue. An outsider who wanted to learn these languages had few textbooks or dictionaries on which to lean, but rather had to pick up the tongue through the slow practice of trial and error. Finally, Indian communities struggled through their own inequalities. A native nobility survived, perhaps gasping for air but with its impoverished head still above water, into the age of independence. The village *cacique* or headman may have been the farmer with one more cow than everyone else, but his word still mattered, and he had to work through the difficult balancing act of appeasing both his Spanish-speaking superior and the friends, relatives, and peers around him. Caciques went by different names in different places—*batab* in Yucatán, *tlatoani* among Nahuat speakers—but the overall concept varied little; for example, in all places the cacique fluctuated between the extremes of village champion and cold-hearted exploiter. Written rules seldom informed their office. Indeed, in this as in so much about Indian village life, what

people wrote counted for virtually nothing; what people expected through custom and usage counted for almost everything.

Material culture was another common denominator of Indian life. While by no means opposed to metal, paper, firearms, or any other technological innovations introduced by Europeans, most communities had no way of reproducing such items on their own. Daily life thus built mostly upon raw materials found closer to home: wood, stone, bone, rawhide, straw, cotton or wool fiber, and in the southeast, the ubiquitous strata of lime-stone subsoil. While outsiders interpreted the material culture of village life as willful backwardness, it was more a realistic approach based on existing options. Livestock of European origin was a different matter; treated well, animals could be fruitful and mul-tiply, so that pigs and chickens became the mainstays without which *pueblo* life would be unimaginable.

Indians of nineteenth-century Mexico inherited a Spanish legal construct known as the caste system. Partly by design, partly through inadvertency, the inhabitants of New Spain lived in a hierarchy that assigned separate rights, responsibilities, and status to different (races. Above all stood *peninsulares*, European-born Spaniards, born to wield high office and title; below them, their American-born *criollo* cousins took secondary honors. Mestizos and Afro-Mexicans occupied an assortment of indeterminate and distinctly low-prestige roles. But it was the classification of *indio* that left the greatest legacy to a future Mexico. Explicitly inferior, indios were nonetheless citizens of the Spanish Empire, and enjoyed key protections in the form of land titles and law courts. Spaniards deemed Indians "children with beards," by which was meant that these biological adults could not fully understand concepts of right and wrong. Legal punishments for Indians were typi-cally light. The arrangement discouraged long-term adaptation, but made the Spanish Empire a place in which the natives of Mexico could perpetuate much of their old lives, and largely for that reason the colonial period lacked massive rebellions. In the eighteenth century, Spanish Bourbon reformers had attempted to introduce administrative regularity by slowly eliminating the corporate powers and identities of their Hapsburg predecessors, but they made only limited headway, and most features of the caste system remained fully operative long after the flag of the Mexican nation first waved.

It was the community far more than the nation that told people who they were and what was required of them. Community norms governed behavior. Men hoisted an early morning cup of rum because the local cofradía required it. Women married and bore children at an age today considered the threshold of puberty. Parents, village elders, or perhaps the local priest made the difficult calls on matters legal or moral. None of this converted villages into the tiny festivals of love and respect imagined in an earlier literature. Quite the contrary: here as in other parts of the world, the little community had few and finite resources, and jealousy, rivalry, feuds, and back-biting shot through daily life as a cross-hatch to cooperation. The situation fulfilled the old Spanish saying of "a tiny village, a huge inferno." In a curious way it all worked, for understood norms and universal resentment kept people in line, achieving what a standing constabulary could not. But the tensions latent in village life could also explode into violence under the wrong circumstances.

Beyond questions of citizenship and legal status, autochthonous peasants also shared a certain vision of why things went right—and wrong. People paid homage and flattery to the gods, and those spirit forces, as petulant as some cantankerous old uncle, usually responded in kind. Fields had "owners" that required propitiation before any seed went into the ground or any corn buds issued up. The only irrigation came not from a well-head but rather from the clouds above, and doubtless for that reason the Yucatec Mayas,

despite centuries of Christian indoctrination, clung stubbornly to their belief in the four *chaaks*, or rain gods; when for some reason the chaaks failed to ride their horses out into the sky and shake water from their celestial gourds, peasants enacted special ceremonies for coaxing them to deliver.

Concepts of illness drew from a similar palate. Pain, disease, and that mysterious intangible called luck were all the result of powerful unseen forces, sometimes incurred by reckless behavior—like walking under a ladder, to take a contemporary case that doubtless reduces matters absurdly. People had ways of neutralizing the worst. For example, they cured the mysterious folk illness known as *susto* (literally, "fright") by placing a raw egg in a plate under a baby's crib or hammock; in the morning the egg would be cooked, for it would have absorbed the evil out of the child. Many indigenous communities had absorbed medieval European concepts of "hot" and "cold" foods—not a reference to temperature, but rather elusive intrinsic qualities postulated by the Greek physician Galen in the second century AD. Foods thus had to be combined through careful formula, lest the inattentive invite debilitating, perhaps fatal, weakening.

In the worst case misfortune originated not through mishap, but rather by the machinations of enemies. For that reason, fear of hexes and witchcraft permeated rural life, as it did in so many other parts of the world. When someone was believed to suffer the results of an evil eye or some other sort of curse, the best defense was to go on the counterattack by hexing the tormentor himself. In extreme cases, the evil-doer might even have taken the nocturnal form of an animal, perhaps a foul-smelling goat (the dreaded *wáay chivo* of Yucatec Maya legend), and in such instances would have to be hunted down and killed.

Among Mayas it was their shamen, called *h-men*, who best understood these things. His name literally meant "he who does," and his knack for blandishing angry rain gods and warding off evil hexes allowed him to survive the indifference of officialdom and the enmity of priests, agronomists, censorious doctors, and even Caste War rebel leaders who disliked rival authority of any sort. As Robert Redfield observed so long ago, the *h-men*'s power did not simply reside in a knowledge of plants and herbs; rather, an air of the uncanny enveloped this individual. And doubtless therein lay his charisma, for it was precisely that sense of the uncanny, of inklings of a dimension beyond the imagination, that gives depth to life. The many *h-men* of Yucatán have survived Porfirian contempt, revolutionary reform, and the coming of cars, televisions, cell phones and out-of-reach medical treatment, and today command hefty price tags for curing illness, and for bringing in not only corn but also votes, because their word remains the ultimate endorsement for would-be governors and *diputados*. Clients include both villagers and big-city folk: evil hexes know no bounds.

Innumerable features set the native peoples of Mexico from their United States counterparts. The Indians of Mesoamerica already lived in more permanent settlements at the moment of contact, and with a more sophisticated level of material culture. Well-defined states had emerged long before the arrival of Hernán Cortés, and the concept of a permanently subordinated peasant class was equally entrenched. Spanish colonialism furthered a tendency already present in the region, in that it reduced organization and consciousness to the level of the municipio. This preserved much of indigenous culture, but also militated against a larger alliance based on region or shared ethnicity. The term "tribe" fails to apply in more than 90 percent of the cases in Mexico, either in a literal or figurative sense. Finally, when independence came in 1821, the idealistic leaders of the new nation forever banned registries based on ethnicity; this measure, they believed,

would go a long way toward creating a single Mexican people. Whether it truly erased ethnic boundaries is debatable, but it did eliminate the possibility of blood-quantum as a yardstick of who is Indian and who is not.

The Center

The Mexican heartland contained a vast body of peoples who enjoyed—or better said, endured—long contact with the European state. Their common denominator was a more direct relationship with the political center, be it the long vanished imperial seats of Teotihuacán and Tula, or the Aztec base of Tenotichtlán, or the new colonial metropole known simply as México. Far more integrated into prevailing Mesoamerican power, the diverse ethnicities included people who lived from San Luis Potosí south to Oaxaca, and from the Valley of Mexico eastward to the Gulf of Mexico. They spoke Nahuat, Otomí, and Totonac, and from late Aztec times onward, Zapotec and Mixtec. Communities of the center prized the agave, for they knew how to extract its liquid and to convert it into *pulque*, the fermented beverage they so prized in the days before soft drinks and commercial beer.

But exactly how "central" were the communities of states like Mexico, Hidalgo, and Puebla? The term "central" perhaps implies greater proximity and accessibility than in reality existed. Anyone who has traveled into remote towns through the mountains and valleys here knows how dramatically lifestyle and perception change only a few miles from a major city. Poor roads, slow travel, and absence of any sort of federally directed education heightened cultural separation. Most communities navigated between influences. Aware of the existence of mostly abstract forces such as the president or the constitution, villagers more commonly dealt with landowners, the magistrate and the jefe político, the village *cura* (pastor), or the local *comandante*, who might in emergencies require their services, no permission asked. It was the last of these that probably brought Indian villagers into contact with the Mexican nation. Repeated involvement in conflicts such as the fight against Spanish counterinsurgency, or the Reform War, or most important of all, the six-year campaign to expel the French invaders and their allies, did involve villagers of different ethnicity, and to a considerable degree. Zapotec peoples of the Oaxaca sierra represent an extreme case of the latter dynamic. They worked closely with fellow Oaxacans Benito Juárez and Porfirio Díaz in campaigns against the Empire, and initially they reaped the reward of political favor. But by the 1890s the original generation of Zapotec brokers was gone, and a new generation of Porfirians lost interest in Zapotec concerns. By the time of the Revolution, they had become one more marginalized group.

In regions where damage from the independence war had been most severe, particularly the Bajío, peasants claimed land without benefit of title. Given their self-sufficiency, the political chaos of the weak state meant fewer impositions through tribute, labor, or compulsory military service. But further to the east, among the Totonac peoples of northern Veracruz, independence brought a gradual encroachment by plantations of sugar, coffee, and vanilla. Land pressures and political violence, eventually aggravated by the U.S. invasion, stoked a large uprising the Huastecas region in the years 1845–1848. In the last third of the century, estate growth resumed, only slowed by the growth of French-owned vanilla plantations on Madagascar.

The coming of Porfirio Díaz changed central Mexican life in many ways. The many rebellions gradually ended; foreign investment fueled the creation of railroads, reactivated

the mining industry, drove up property values, and gave new impetus to the growth of haciendas. Courts began to disfavor anyone working land without proper written title; in 1894 a new law permitted the alienation of baldío lands. These changes resulted in peasants losing vast quantities of land, and with it, the lifestyle that had served them for centuries. By 1910 some 50 percent of rural Mexicans had lost their life as autonomous villagers and had instead gone to work as peons on the haciendas.

In the center-west, Porfirian policies transferred a significant amount of land away from the Purépechas of Michoacán and into the hands of mestizo rancheros. Immortalized in Luis González's *San José de Gracia*, the western rancheros epitomized settler culture at both its finest and its worst. Theirs was a world of small properties, not communal lands or sprawling haciendas. Tough as their own saddle leather, thrifty and efficient in all things practical, they also clung pugnaciously to a religion that justified their displacement of the native people. Indian communities that lost land predictably embraced the coming of *agrarista* parties in the 1920s, while the newly landed settlers fought the new order until they could fight no more. Self-consciously indigenous mobilization arrived here only later under the ferocious leadership of Primo Tapia.

The Maya Region

Maya peoples constituted one of Mesoamerica's great macro-cultures. Never unified even at the height of the Classic period, large political leagues (basically, alliances among city-states) had collapsed by the time of contact, and stayed divided thereafter; the Spanish colonial practice of division into municipality simply solidified the divisions. For these reasons difference among the various Maya peoples usually outweigh their similarities. But the Chontal, Tojolabal, Tzeltal, Tzotzil, and Yucatec peoples did share certain basics. All had existed from time beyond memory as cultivators of corn, so much so that life revolved around the annual cycle of alternating dry and rainy seasons. All spoke a variation of the macro-Maya language, all conceptualized a reciprocal relationship between humans (that is, the temporary residents of the earth) and the gods who were the true owners of the land and forest. And all had had to salvage what they could of an older culture and society under the terms that Spanish colonialism brought.

Of all of Mexico's nineteenth-century ethnic groups, it was the Yucatec Mayas who wrote for themselves the most sensational of histories. Innumerable myths surround the people of Mayab: that they were unreconstructed versions of the Classic era; that they shunned private property; that they awaited the moment to drive the Spanish into the sea; that some lived as a remote tribe known as the Huites, naked and primitive and uncontacted like certain early twentieth-century Amazonians. None of this obtained. By the mid-nineteenth century, Spanish colonialism, together with Spanish-speaking settlers and a considerable presence of political, religious, and military influence, had penetrated into almost all parts of the peninsula.

What upset the cart was political violence. The Hispanics who dominated the peninsula failed to reach consensus on where they were headed, or whether they were going there with or without a Mexican nationality. Nor could they manage even the most local of elections without challenging the results at rifle-point. Peasants had long endured such burdens as religious and civil taxes, but it was the process of being drawn into interminable wars, and as a result of those wars to see only privatization of lands, municipally-based land use fees, and a perpetuation of old racist attitudes that eventually provoked

them into rebellion. The Caste War erupted (1847) along a string of eastern communities where smuggling and other assorted illegalities had become endemic.

Far from uniting Yucatec Mayas, the war splintered them into a mosaic of peoples. The original insurgency—whose degree of success has been greatly exaggerated over the years—never counted on the support of more than 20–30 percent of Mayas, and in the wake of the successful counterinsurgency of 1848 onward crumbled into an assortment of caudillo-led clusters; even the fabled Speaking Cross oracle failed to impose unity, and many former combatants opted for life as supposedly "pacific" communities in the far east and south, in exchange for terms that amounted to almost total autonomy. Even in the areas of Caste War genesis, many fled to the safe havens of Guatemala, British Honduras, or nearby islands, never to return. For areas outside the tempestuous east, the Caste War brought only new hardships: through conscription, or as forced extractions of labor and goods, or by the radically increased danger of violence at the hands of passing soldiers. But the state's need for stability had unexpected benefits: Maya self-government continued until 1868, and in fact for some time thereafter in various disguised forms, while privatization of community lands was delayed until the 1870s and beyond … indeed, in some cases it never happened at all. The war essentially removed the clergy as a supervisor and tax-collector, but also drove many a free villager into life on the emerging henequen haciendas as a way of escaping guard duty on the frontier pickets known as *colonias militares*.

Like all other of Mexico's native people, the Yucatec Maya had to cope with the Liberal abolition of indigenous self-government. At varying times (1868 in Yucatán) the state did away with the caciques and the *repúblicas de indígenas* that had guarded land titles and administered petty justice since the 1500s. But old ways died hard. As the Yucatecan case illustrates, Hispanic governments continued to erect a variety of makeshift titles and responsibilities similar in flavor to the office of *batab* (which title persisted for several additional years in remote parts of the peninsula, edicts notwithstanding).

Chiapan Maya groups experienced most of the same pressures, but with less cataclysmic reaction. Once Spain was out of the picture, Chiapan creoles and mestizos expanded their production of cacao, cattle, cotton, and sugar; toward the century's end the Chiapan rainforest witnessed a smaller version of the rubber-tapping boom whose cruelties swept the Amazon basin. Liberalism helped discredit the Church as a controlling force; but at the same time removed a counterbalance to the powerful landowning class. Despite these hardships, and despite the epidemics which periodically scourged the region, the province's Indian population continued to grow, so that each year more and more people fought each other over control of an ever-contracting land base. Chiapan Maya groups responded with periodic violence in the 1840s through 1860s, but failed to reverse the overall drift of their province toward a racially divided plantation society.

Of the many groups that remained aloof to western civilization and power throughout the nineteenth century, none proved themselves more elusive than the Lacandon Mayas. Not remnants of the vanished Classic-era civilization, but rather a new ethnicity that emerged in the seventeenth century, the Lacandones survived precisely by being where no one else wanted to be. They lived perfectly contentedly with their gardens of corn, yams, and plantains, which they occasionally supplemented by wild honey, fruit, and roasted fish and forest game. Canoe-born Lacandones clad in their long, white tunics and shoulder-length hair, plied the slow, intricate tributaries of the mighty Usumacinta. The sheer remoteness of their existence discouraged competition from

haciendas and ranchos; only the mahogany cutters dared penetrate into the Lacandon rain forests, and they were easily detected and more easily avoided.

Survival on the margins did not always demand vast geographical distance. The Chontal Maya of Tabasco, for example, had no need to flee to the mountains. From the moment of contact, Spaniards had shunned hot, low-lying wetland areas for the obvious reasons, and for that reason the Chontal had only to remain in their vast swamp known as Centla, in fact located rather close to the Gulf of Mexico and easily accessible from Villahermosa or Isla del Carmen. The Chontal lived principally by fishing in small cooperatives, usually electing a daily chief by reason of experience and a knack for telling stories that could fill the long day at nets and fish hooks. Unique among Maya peoples, they created the plaster for their homes not from the limestone of the ground, but rather by burning oyster shells on mounds of old cocoanut husks, and at night their bonfires illuminated the swamp's long and irregular coastline. While documents have their own way of lying and concealing, most evidence does suggest that the Chontales ducked out of the Hispanic political violence that racked so much of nineteenth-century Tabascan history.

Whether in Yucatán, Chiapas, or Tabasco, indigenous peoples were late to join in the revolutionary ferment. Their greater numbers and proclivity for rural life kept them linguistically isolated, while the south's race-based hacienda system kept them out of national currents of information, and far more under the hacendado's thrall. Immense geographical boundaries only compounded the isolation. While it now appears that some degree of revolutionary mobilization was emerging in the 1910s, it failed to approach the size and coherence of the better informed (and Spanish-speaking) peasants of Morelos and Chihuahua.

The West

Western Indian groups confronted similar problems. The Huicholes, Coras, and Tepehuanes have called the Sierra Madre Occidental home for centuries. Spanish colonists and their Tlaxcalan allies first contacted the three peoples in their mountain refuges in the mid-sixteenth century, and had sporadic contact with them throughout the colonial era. While the relationship involved exchange and assimilation, conflicts emerged as well, as happened during an early eighteenth-century uprising of Huicholes and Tepecanos. Occasionally western natives clashed with each other as well. This contentious and rather disorderly relationship lasted throughout the late colonial years.

By the time of Mexican independence, Indians in the Sierra Madre Occidental lived in varying states of assimilation. Many Tepehuanes, for instance, spoke Spanish regularly, whereas the Huicholes and Coras rarely did so. Culturally, the three groups kept their distance from the larger Mexican population. The Huicholes were, and still are, adept at long-distance travel, migrating throughout the mountain highlands to the coast to trade sea-salts for goods they could not produce for themselves. They also clung tenaciously to their more traditional cultural practices, only adopting outside influences when needed or wanted. The Coras, allies and occasional rivals of the Huicholes, remained fiercely independent throughout the entire nineteenth century. Although they had been reduced to Catholic mission-towns during the days of New Spain, most Coras perpetuated aspects of their native religion. Most importantly, the western groups shared a culture built around corn cultivation, the deer hunt, and ritual use of the hallucinogenic peyote button as a way of achieving contact with divine forces.

Mexican independence brought changes to this isolated world. Despite the difficult terrain, which had always allowed Huicholes, Coras, and Tepehuanes to avoid sustained and ruinous contact with outsiders, governmental influence and Mexican settlers now made their way into the western sierra. National leaders now debated what to do with lands that they believed the Indians poorly administered. For these reasons, legal land quarrels raged throughout the 1820s and 1830s. In the highlands of Jalisco, Indians around Hueuquilla and Mezquitic sought assistance to reclaim lands the considered their own; they sought the right to rent out parcels to others, and protested against encroachment from neighboring properties. Indians in Tuxpan attempted to secure legal titles to protect themselves against aggressive neighbors. The Huicholes and Tepehuanes of Jalisco's far north became relatively adept at navigating the legal labyrinth.

During the 1840s area haciendas began to expand, bringing indigenous groups into closer contact with the Mexican state. The *fundo legal* still functioned, but around the town of Huejuquilla, near the Zacatecas border, Indians and Mexican landowners fought over a variety of land-related problems. Disputes typically arose when hacienda workers cut down trees on indigenous land, or sewed animosity by entering native towns. A full seven years prior to the Ley Lerdo, Jalisco's Indians lands had already come under assault by outsiders. While conflicts with hacienda workers were most common among Huicholes, encroachment problems occurred almost everywhere throughout the Sierra.

The native response to these cumulative pressures came in the form of the Manuel Lozada rebellion of 1857. Coras, Huicholes, and Tepehuanes served as foot-soldiers, although Indians towns chose on an individual basis whether or not to participate; indeed, localized identities are typical for the western Sierra Madre, where relationships between two towns speaking the same language could be as contentious as the contacts that Indians had with Mexican neighbors. The Cora-born Lozada fought a fifteen-year battle for land rights and sovereignty for his indigenous allies, with Coras by and large providing the bulk of his troops. During the French intervention (1861–67) Lozada chose to support the invaders, in part because the Conservative ideology allowed for Indian corporate identities and land rights. Conversely, the Liberals' insistence on private property and their opposition to syncretic religious practices pushed hesitant Sierra Indians toward Lozada. Fifteen years of fighting helped to solidify native resistance (including the unarmed variety as well) to the land grabbing that had gradually increased throughout the century.

The presidency of Porfirio Díaz helped increase Mexican presence in the Sierra. Díaz and like-minded positivists believed that native peoples wasted their land, and that to improve Mexico required a transfer of ownership and administration to others. Particularly in the Huichol and Tepehuan regions, surveying companies marked off *baldío* ("empty" land) for sale, the proceeds of which were purportedly to benefit the larger nation. Ranchers, hacendados, and surveyors themselves fell upon the opportunity, claiming areas that in fact belonged to indigenous communities. The Huicholes detested these thefts, but too often spent time and energy fighting amongst themselves over the shrinking land base. They sought the counsel of anyone whom they perceived could help them, including the noted botanist and ethnographer Carl Lumholtz, who visited the region between 1890 and 1910. Cora leaders similarly decried the encroachment of mestizos, who multiplied through what, in 1917, became the state of Nayarit. As ranchos spread throughout the western sierra, and mestizos and foreigners continued to pour in, the Huicholes, Coras, and Tepehuanes used both violence and legal means to protect their homelands as best they could.

Another sort of indigenous peoples—the semi-nomadic hunters, gatherers, and occasional farmers of the far north—suffered mightily once Mexico became a nation. Groups to the far east, peoples that once thrived in huge numbers along lower Rio Bravo, suffered the most. They began to disintegrate under the pressures of José de Rendón's Nuevo Santander colony (today Tamaulipas), the growing Hispanic presence in Saltillo and Monterrey, and the Texas settlement campaigns of 1712 onward. The Anglo inundation that followed Texas independence sealed their fate. By 1886 linguist A. S. Gatschet, working in the area of Reynosa, Nuevo León, could find no more than a handful of geriatrics capable of remembering their ancient tongue.

Northwestern groups fared better. The Yaqui Indians who thrived in Sonora's mountains and river valleys found some measure of organization under the tutelage of the Jesuit missions, and maintained those abilities once the blackrobes departed in 1767. For the next 130 years they fought a surprisingly effective campaign against the avarice of miners, surveyors, homesteaders, and would-be hacendados who eyed Yaqui bottomlands as prime agricultural land, and Yaquis themselves as the ideal people to work it. Yaquis took advantage of the mid-century chaos to keep out this undesirable element. Under the leadership of Indian former soldier José María Leyva, they proclaimed their independence from Mexico in 1875. Only with the coming of Porfirio Díaz's army ten years later did Leyva and his nation finally fall. Díaz deported some 15,000 recalcitrant Yaquis, at least half of whom went to the henequen fields of Yucatán. Some continued to hold out in remote mountain hideouts, others fled to better-paying jobs in Arizona, while the majority eked out a living as laborers on the rapidly multiplying farms and ranchos of the late nineteenth century. Farmers and ranchers were happy to confiscate their lands but prized Yaqui labor, and in no small part Sonoran revolutionary anger sprang from opposition to Díaz's continued deportations.

Conclusion

The 1910 Mexican Revolution's assault on Porfirian values was not as Carthaginian as might be hoped. On the contrary: all but a fringe of revolutionary intellectuals (to say nothing of iron-knuckled caudillos) subscribed to the basic tenets of the positivist vision, in which all peoples marched inexorably toward a well-ordered and technologically sophisticated future. Early revolutionary indigenism revived the reputation of Indian peoples past, but worked toward both putting shoes and nationalist attitudes on the Indians of their own day. For all its blind sides, this early initiative of revolutionary thought inspired a great deal of research into the deep past (serious archaeological work made huge advances, particularly in the Maya region); the new breed of Mexican state-builders also commissioned reams of anthropological inquiry of how peasants operated, what they believed, and what languages they spoke—even if said inquiry was for developmentalist ends that most anthropologists today would reject. Homogenous nationalism proved elusive. It was the partial penetration of state bureaucratic projects like education, coupled with the decline of Marxist economic, class-based revolution and the simultaneous dismantling of the state under neo-Liberal policies that opened space for a more authentic, grassroots indigenism in which small organizations tackled mostly local problems, and ethnic pockets vastly older than the Academia Real found champions willing to systematize the language, write pocket grammars, and speak for their people. Doubtless revolutionary theoreticians like Manuel Gamio would have been surprised to hear it, but the question of how to deal respectfully and meaningfully with indigenous

peoples in a multicultural state, even when most Mexicans don't feel particularly multi-cultural, is stronger than ever in the first decades of the twenty-first century.

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A Brief History of the *Historia moderna de México*

SERVANDO ORTOLL AND PABLO PICCATO[1]

Enrique Krause, the preeminent contemporary public historian suggests the significance of the scholarship of Daniel Cosío Villegas:

> "Every self-respecting Mexican library has in its collection the beautiful tomes of the *Historia moderna de México (Modern History of Mexico)*: the smooth volumes, the old national coat-of-arms; on the cover, the well-known mural by Diego Rivera: *Sunday on the Alameda*. The five volumes in pale red, spanning the internal and foreign political life during the Restored Republic (1867–76) and the era of Porfirio Díaz (known as the *Porfiriato*), were written by Daniel Cosío Villegas. Those tomes in brown and blue that cover, respectively, the social and economic life during the same periods, were penned by several historians under the direction of Cosío Villegas. Those 11 placid volumes reflect tens of thousands of readings, an enormous research task involving archival digging, analysis, understanding, and synthesizing that took 23 years of effort. And there they are, like so many other Mexican landmarks, like an old parish or *plaza*. Those who come across these works look at them or overlook them, without giving due recognition to the fact that they represent a miracle of creation. …"[2]

The *Historia moderna de México* did not result from a single burst of creativity or a miracle; rather, it was the product of a lengthy international collaboration between Mexican scholars and U.S. and Mexican institutions. The alliance focused on the production of a collection of books for admiring Mexican readers like Krauze, but involved the building of academic institutions and the construction of a genealogy for the struggling Mexican democracy during the Cold War.

That partnership did involve a lengthy negotiation between writer Alfonso Reyes and economist Daniel Cosío Villegas, on one side, and officers of the Rockefeller Foundation, on the other. The confluence of these actors was not the product of hard work only. Cosío Villegas had links with the Rockefellers and was also well placed in the nation's cultural and political life, holding central administrative positions in Mexican not-for-profit institutions from the latter part of the 1930s on.

This chapter traces first the genesis of the *Historia moderna de México* to the growth of El Colegio de México, and the fact that Reyes and Cosío Villegas were liked and trusted by Rockefeller Foundation officers as promoters of the humanities. These circumstances allowed Cosío Villegas to enlist the help of a group of his students at the Colegio for the "enormous research task" and writing of the *Historia moderna de México,* an endeavor that took well over a decade from its planning to its conclusion.

The second part of this essay analyzes the structure and writing of the first volume of the *Historia moderna* and concludes that it was not so completely original, in terms of its methodology in research and writing, as was claimed by Cosío Villegas. The *República Restaurada, Vida Política*, attempted to explain contemporary politics as much as an effort to recover a forgotten part of the national history. In his requests for support to the Rockefeller and his polemical defense of the book, Cosío Villegas belittled the value of earlier historical works, proposing instead a "modern" interpretation that started from scratch, historiographically speaking. In direct response to the political situation of the mid-twentieth century, he set out to explore the parallels between the Porfirian period and the conservatism of the post-revolutionary regime of the 1940s. The book, we suggest, should be read in the context of the Cold War and as the result of a collaboration with U.S. institutions, with a Latin American implication, in the middle of the growth of populism and the feared threat from the left in Latin America, Mexico appeared as an exception that deserved to be studied in detail.[3]

In sum, although Cosío Villegas and his admirers defended the *Historia moderna* as an example of modern and professional historical research, the entire project depended heavily on the discreet support of a foreign organization that was seen by many as an interloper in Mexico and an impediment to democracy, and the overt influence of intellectual caudillos and their personal styles. The historiographical contribution of the *Historia moderna de México* was not as modern and scientific as claimed by Cosío Villegas. Rather, it was the product of politics and institutions within and outside the national historical profession. The process of production of the first book in the *Historia moderna de Mexico* series, examined below, was part of the construction of academic institutions in the twentieth century, and had, in turn, considerable impact on that process.[4]

Part I

This whole process started under the guise of another transatlantic collaboration. Originally created in July 1938 under President Lázaro Cárdenas, the Casa de España aspired to become a "center for meeting and work" for a select group of Spanish refugee intellectuals, professors, and artists so they could continue pursuing their teaching, research, or artistic activities in Mexico. In 1940, the Casa de España became the Colegio de México under the directorship of diplomat and scholar Alfonso Reyes and with the direct involvement of Cosío Villegas in several administrative capacities.[5] As a civic and non-profit association, the Colegio de México received the support of several organizations: the Casa de España donated all of its assets to the newly-born institution; the Federal government, the National University of Mexico, the Banco de México and the Fondo de Cultura Económica provided additional financial assistance.[6] After October 1940, the Colegio "support was limited to the Mexican Government and grants from private sources." According to one Rockefeller Foundation officer, the activities sponsored by the Colegio tended "to raise the standard of teaching and investigation" in Mexico.[7]

Inside the Colegio, one of the institutions that attracted the interest of Rockefeller Foundation officers from the Humanities Division was the Centro de Investigaciones Históricas (the Center for Historical Research). Under the directorship of historian Silvio Zavala, the Centro aimed at providing students, both from the capital and the provinces, with fellowships so that they might study full time and get training through seminar courses during three or four years. Once they received a solid education, according to the plans of the Colegio founders, some of the students would take charge of the main archives of the nation, while the rest, "the most intelligent and hard-working" could find their way in the "field of historical research."[8]

Cosío Villegas, who had been the recipient of a Laura Spelman Rockefeller Memorial fellowship for the study of economics from 1926 to 1928[9] and had ties to the Rockefeller family, approached Rockefeller officers in Mexico interested in developing studies of the humanities in the country. While he and Reyes failed initially to get an institutional endowment, in July 1942 both Reyes and Cosío successfully convinced foundation officer, William Berrien, to recommend that the Colegio receive "ten fellowships for Mexicans (five from the capital and five from the provinces) to continue (or in some cases begin) their full-time training as advanced students in Silvio Zavala's center of historical studies." Also, they persuaded Berrien to grant support towards professors' salaries as well as "assistance for Alfonso Reyes as president of the Colegio … to devote more of his time to writing." In addition the proposal included "four fellowships for American predoctoral students of Latin American history" and a "grant-in-aid to establish a library school within the Colegio."[10] Due to "limitations" of the foundation program and a dose of caution about undertaking new projects, the grant was reduced to "three needs" for the following two years: contribution toward salaries ($16,520), fellowships ($10,320) and a "Director's fund for research ($2,500)." In all, the support given by the foundation amounted to a total of US $14,670 per year.

The foundation's goal was "to encourage constructive efforts to develop a national plan for the teaching of humanities." Given the experimental nature of the endeavor, at the end of the first year there would be a review of the program and its contributions to salaries were to be matched by the Colegio itself.[11] Reyes and Cosío Villegas were able to expand and continue this relationship thanks to their skills and professional networks. What began as a two-year trial for the first Rockefeller project to assist the development of the Center for Historical Studies at the Colegio, would become a semi-permanent relationship in years to come. Rockefeller officers regarded Reyes and Cosío Villegas as:

> "… of the very best. … the kind of men one can trust and with whom it is a pleasure to do business, since they seem genuinely interested in the development of the humanities in Mexico and the Colegio with them in charge seems the best place to promote such development."[12]

The foundation officers were so enthused with developing the Center for Historical Studies that, in January 1944, they approved a grant-in-aid "for expenses of travel and research of Professor and Mrs. Silvio Zavala in South America during the years 1944 and 1945."[13] While originally Zavala planned to spend some time in Argentina to conduct research, foundation officers took advantage of his traveling project to propose that he and his wife go to archives and libraries in other Latin American countries along the route. Thus, they could become familiar with the types of materials one could find in such institutions, and meet personally with their directors: an investment that would

eventually pay as these contacts provided recommendations for students of their countries who were interested in studying at El Colegio de México.

This aid continued in spite of the foundation's policy to support programs for no more than two years, "unless unusual circumstances indicate special consideration." Reyes and Cosío Villegas presented the Colegio as an alternative to the National University of Mexico which, to the eyes of the foundation officers, was anachronistic because neither professors nor students dedicated themselves full-time to their scholarly activities. In contrast, they argued, "by conducting courses in the day-time and requiring considerable preparation for each assignment" two centers at the Colegio (the Center for Historical Studies and the Center for Social Studies), together with the National School of Anthropology, were "making it evident that college and university work of good quality requires a student's full-time attention." Against the rapidly growing Universidad Nacional, the students at the Colegio were "few in number and practically all of them receive financial assistance which enables them to devote four or five years completely to their preparation as future scholars."[14] In December, 1944, the foundation's Director of the Humanities, David H. Stevens, and its Acting President, George Strode, decided to continue supporting the Colegio because:

> "The Center for Historical Studies was organized for full-time research with special interests in the origins and growth of American culture. … The purpose of the Center … is to train investigators who will develop fuller understanding of the literary, artistic, and intellectual traditions of the American continents. … this program has brought graduate students from the United States and from countries of the Caribbean area."

As a result of the project's success, the foundation granted the Colegio a total of $56,520 for a four-year period starting January 1, 1945 and ending December 31, 1948, with a yearly amount available not to exceed $14,130. This funding was to be divided between fellowships ($4,800), research grants for staff ($6,830) and books and journals (S2,500).[15] By April 1948, it had become obvious that the continuing success of the Colegio justified "special consideration" from the Rockefeller. From 1942 to 1948, the foundation had "appropriated to the Colegio de Mexico a total sum of $117,810." Out of this amount "four grants and three grants-in-aid [had] supported basic research and teaching in the history of the American continents." By 1948, further consideration was given to continue supporting the Colegio.

> "In seven years the Colegio has become a permanent, self-governing institution with an international influence upon scholarship. Its nineteen professors devote full time to teaching, research, and writing on varied aspects of cultural history of the Americas. … The unique quality of the Colegio is [its] ability to give full-time employment to a sufficient number of men for adequate treatment of subjects. The results attained during these seven years prove the need of such support in a Latin American institution. For this the foundation has been only partially responsible, chiefly by supplying funds that could be counted on through a period of several years."

Although not all students received a doctoral degree from the Colegio,[16] Reyes and Cosío Villegas followed Rockefeller recommendations:

> "The programs of the Colegio require three years of advanced study toward a doctors' degree. … About one-half of the twenty or more in each class have been accepted from other countries; these are the ones aided thus far by foundation funds supplementing grants

of their own governments. … As the first classes have completed the work, their members have taken on governmental duties in Mexican education or have returned home to new work in Cuba, Puerto Rico, Venezuela, Costa Rica, Guatemala, Colombia, Peru, and the United States."

In 1948 a new grant for $53,000 was justified considering "the importance of this center for training of personnel essential to the future of liberal education in the other Americas."[17]

In this context of inter American cooperation, a new proposal took both institutions toward a new goal: that of producing a major opus on Mexican history, one which would—at least in principle—modify the prevailing interpretations of Mexico's past and would (at least in principle) revolutionize the research and writing methods of historians. The project came from Daniel Cosío Villegas himself who, tired of splitting his time between the Fondo de Cultura Económica publishing house and the Colegio, wanted to set aside his administrative duties "to devote two years to the preparation of a history of Mexico in the twentieth century."[18]

As early as May, 1947, Daniel Cosío Villegas approached David H. Stevens, Director of Humanities at the Rockefeller Foundation, "in a tone of most friendly confidence," about the plans he had been hatching. He wrote candidly to Stevens:

"You, personally, will readily understand this: like many Mexicans of my generation, I have always postponed my own interests, whether economic or academic, to serve enterprises of a national or public character: in the government service (I was its economic adviser for four-teen years), teaching at the National University, helping Dr. Reyes at El Colegio de México and above all directing Fondo de Cultura Económica, which, as you know, is a non-profit publishing house very much alike your University presses. … I believe that a man has fulfilled his duty toward his country by devoting to it twenty-five years out of forty-six. That is why I would like to spend the next five or six years (perhaps the last useful ones I shall have) to prepare and write a couple of books giving thus for once satisfaction to my own calling, and perhaps serving my country at the same time, although in a different field."

Writing those books was no easy task, particularly if one had to cope with other activities. Cosío Villegas described himself a "poor man, as a public servant or a University professor usually is." Therefore, unless he received a grant-in-aid to replace his income, he could not give up his multiple jobs. Cosío Villegas wanted to know what his chances were of getting a scholarship from the foundation, particularly because he intended to write "a history of what we call the Mexican Revolution." In addition, he considered it "improper" for his main institution—the Colegio—to give him a grant in aid, "as I am an official of it," and the Colegio had no "funds to spare."[19]

Stevens's reply to Cosío Villegas's inquiry was encouraging: "It is a matter of interest to all of us," he wrote, "that you are considering a long term study of the social and cultural history of Mexico since 1900." Stevens asked Cosío Villegas for a more detailed description of what he had in mind "with respect to methods and place of study."[20] Cosío Villegas was in a privileged position to obtain such support.

When one Rockefeller officer asked Lewis Hanke—director of The Hispanic Foundation at the Library of Congress and a person well acquainted with Latin American scholars—about the capacity of Cosío Villegas to tackle the project at hand, Hanke replied he had "a high opinion of Cosío's intelligence and industry and consider[ed] the topic an important one well worth working on." Other historians in Mexico whose

capacity would be comparable to that of Cosío Villegas—Zavala and Edmundo O'Gorman—were both interested in colonial history, while additional Mexican historians were "too young yet to be sure what their real abilities" were. It was obvious to Hanke that Cosío was the man for the job:

> "In order to tackle the subject, a vast one, of the social history of Mexico from 1900 on one would need deep insight into Mexico's basic problems and the sort of fearless honesty which would make it possible for one to speak plainly. I believe that Cosío has all these qualifications and so far as I know there is no better person in Mexico for such a job. He is an economist rather than a historian but of course for this period one would have to know much about economics. Above all Cosío has a rather wide ranging intellect and is still young enough to be willing to devote himself to the back breaking job of digging the material out."[21]

On February 20, 1948, in a proposal to the Rockefeller Foundation committee in charge of deciding on grants and fellowships, Cosío Villegas stated that he wanted "to interrupt his administrative work to devote two years to the preparation of a history of Mexico in the twentieth century." His study would deal with "the political philosophy, economic policy, social structure, educational thought, and relations of the church and state of the period from 1870 to 1900, and an analysis of the Mexican revolution with special attention to its aims." The study would also include "an analysis of Mexico's present domestic situation and its position in international relations" and "prove of fundamental importance for an understanding of modern Mexico." The Rockefeller Foundation thus granted El Colegio de México $10,000—covering a $350 monthly stipend for 24 months ($8,400), secretarial assistance for the same period ($1,000) and travel funds ($600)—"to enable Mr. Daniel Cosío Villegas to devote two years beginning July 1, 1948, to the preparation of a history of modern Mexico."[22] Other Mexican institutions also supported the project, including the Colegio de México, the Secretaría de Hacienda and the Banco de México.[23]

Just as with the grants for the Colegio de México, the success of this new project resided in the ability of Cosío Villegas to extend the foundation's support beyond the initial goal. A year later he told one of the Rockefeller officers he had come to recognize that his project was far more difficult than he had originally envisaged: he had "underestimated" the project's "magnitude by at least 100%," particularly because he was unable to find "reliable work on the period since about 1860 in the publications of either Mexican or American historians." As a corollary to this problem, "all the facts [had] to be worked out from the original sources which are badly organized … in Mexico." Cosío Villegas was particularly distressed about the lack of documents on Porfirio Díaz, although he had "ruled Mexico for nearly thirty-five years, he left almost no personal records."[24]

The question now for Cosío Villegas was how to finish his work in the year he had left. Or, put differently, since he already had indicated to the foundation that the amount of work facing him was at least twice as extensive as he had anticipated, how to continue receiving a stipend from the Rockefeller without losing face vis-à-vis its officers. William Barry, his old friend now at Harvard, supported him once more. When he heard Cosío was falling behind schedule, he told the foundation that it was worth having him in charge of the project as "his interest could be multiplied among young historians," and thus "a very necessary step would have been taken toward defining paths of research in

Mexican history in terms of significance of interest and topic."[25] Berrien may have suggested that Cosío Villegas develop a seminar on Mexican history to have some of his former students help him with his project. What we know is that Cosío met with Charles B. Fahs in Mexico City the following week, and presented him with an eight-point memorandum that summarized the teaching situation at El Colegio de México. The Colegio, Cosío said, had decided in 1945 to stop teaching and devote itself exclusively to research after 1949, while the Escuela de Antropología e Historia would take over teaching. Despite the agreement the Escuela had not opened new courses, hired graduates from the Colegio, nor remunerated those who already worked at the Escuela. The Colegio did not want to take over teaching. What Cosío preferred was to have a selected group of students attend a seminar he would now direct, that combined teaching with research.

Cosío proposed a yearly seminar assigned to one of the Colegio's professors. More precisely, he referred to a seminar in Contemporary History of Mexico that he would coordinate. The aim of the seminar would be to research in depth the political, social and economic history of Mexico from 1867 to 1950. Five fellowships of $610 would be offered to the "most advanced students" from the Colegio and the Faculty of Philosophy and Letters from the National University. The fellows would be committed to work at the seminar from 9 a.m. to 2 p.m. During this part of the working day they would "attend conferences, do research and write their own work." The selection of fellows would take place between January and March 1950 and the seminar would begin July 1, 1950. The following would be the yearly expenses incurred by the seminar, $6,525 of which would be paid by the foundation: $ 5,000 as the director's stipend; five fellowships of $610 each, totaling $3,050; and $500 for materials, for a grand total of $ 8,550.

To make the seminar appealing, Cosío Villegas stated that its "final result" "would be the writing of a Historia Contemporánea de México" which not only did not exist, but also "could never be satisfactorily written without an intensive and sustained collective effort."[26] On August 8, 1949, Fahs reported that Cosío was unsure of what students he would have at his seminar: university students or students with advanced training from the Colegio? If the latter, he would "require stipends somewhat higher than those proposed in his outline." Fahs asked Cosío to decide "on the basis of which he thought would contribute most to long-term establishment of work in this field." At any rate, Cosío wanted "the seminar to begin on July 1, 1950," and that the grant or grant in aid include a "provision for continuation of his salary." Moreover, Cosío warned Fahs that he would need more than one year of work, but he did not want to ask for more than one year's financing as he wanted "to make sure that the project [would] work before asking for longer support."[27] Although the foundation officer did not report on it, Cosío Villegas was searching for ways to prolong his time under the auspices of the Rockefeller.

By February 1950, Cosío had persuaded the foundation that it should extend its fellowship for two additional years. This time the Rockefeller Foundation resolved to appropriate $14,500 for a two-year seminar, which included $10,000 for Cosío's salary for an equivalent amount of time; $1,500 to allow him to travel to the United States "for discussions with American scholars of Mexican history and with other scholars who have been struggling with the problems of writing more significant contemporary history," and $3,000 for research assistantships (two senior and four junior research assistants). The Rockefeller officers, who were convinced of the importance of the project, embraced Cosío Villegas's own arguments about the contribution of the seminar. They argued:

"Mexican history since the middle of the nineteenth century has largely been neglected by serious scholars in both Mexico and the United States. It is, however, a period in history of which a sound understanding is essential for rational consideration of Mexico's contemporary internal and international problems."

The continuation of the grant was justified in yet another way: "the body of source materials on this period is so large and there has been so little careful investigation," argued the same officers. The personality and the push of its director proved essential for its successful execution: "Dr. Daniel Cosío Villegas is outstanding among Mexican historians, no only for his interest in this period but also for personal qualities of character, forthrightness, and courage, which are important in dealing with problems which are both difficult and controversial."[28] It is not surprising, then, to see that in December 1951, Cosío Villegas had once again convinced foundation officers to support his project.[29]

Cosío kept negotiating extensions to his work on the Modern History of Mexico without providing actual results. On February 26, 1954, the comptroller calculated that $210,352 in grants had been provided to the Colegio, and that a grant in aid for $2,700 had allowed Cosío Villegas to study in the United States from 1945 to 1946. Finally the comptroller indicated that since 1948 $42,692 had "been appropriated specifically for the work of Mr. Cosío Villegas, principally for research in modern Mexican history." In his work, Cosío Villegas was now helped by "about ten research assistants whose stipends are financed in part by the current Foundation grant and in part by the Banco de Mexico and the Colegio de Mexico."

The work of the seminar was suspended in 1952–1953 because of the transfer of the National Library to the new campus of the Universidad Nacional, but Cosío Villegas's salary continued. This support was extended directly to him and the Colegio was asked to cover the cost of his research assistants.[30] The officers still believed that Cosío's work promised "to be a unique and important contribution to the understanding by Mexicans of their own background and problems." Moreover, "Modern history of Mexico has never before been dealt with by Mexican scholars with this degree of thoroughness."[31]

Less than six months after Cosío had received the "small grant" that would cover his salary, he recognized he could not maintain his promise of finishing his work by the end of June, 1955, when his seminar was to end. Things were difficult. He was to write two out of the six volumes of the *Historia* (the first and the fourth) and while he had basically finished the first, there were problems regarding the fourth: "I am now convinced it will be impossible to have it ready by June 30, 1955 […]," he admitted, and explained that his role as editor of the contributions of his collaborators to the *Historia moderna* had delayed his work as a writer.[32] His efforts to maintain a unity of style and to ascertain that such a style would be readable for a wide audience was an argument to postpone even further the delivery of the missing volumes. All the editing that Cosío Villegas had decided to undertake had become an obstacle to getting his own work done on the fourth volume of the series: "The actual situation is that I cannot expect to have free for my own IV volume but the morning, and this, of course, is insufficient as I have written not a single word and much reading is to be done," Cosío went on. The two volumes remaining—IV and V—would require two more years of work, "that is, down to June 30, 1957." In practical terms Cosío was again asking for an extension of his fellowship or salary, as the Banco de México and the Colegio de México would only cover assistants and other minor expenses.

As for his own salary, he argued, "there is little likelihood that anyone will take care of my own stipend, and, to be frank, if there were, whether an individual or an institution here in Mexico ready to do so, I would much prefer to receive it from your Foundation." He acknowledged that a "a fellowship for nine years looks more like a salary" but he suggested that the cost of stopping now, in 1955, instead of giving him an additional two-year extension, would be high. The Rockefeller was left with very few options: "if it is within your Foundation's policy to help Mexico and there are in this country no … new projects, it might not look too absurd to support a project which is so well under way." And then he added, somewhat dramatically, "it will be a real disaster to stop work next June, not only for the two unfinished volumes, but for the whole project: could I honestly agree with my publisher to hand over every six month[s] the manuscript of each one of the six volumes when I know in advance that I certainly will fail in the cases of volumes IV and V?"[33] The foundation officers argued in his favor for the continuation of this "major undertaking." It was clear to them that the Rockefeller Foundation had "invested heavily in the work of Cosío Villegas," but there had also been "a substantial Mexican investment from the Colegio de Mexico … and from the Banco de Mexico and the Secretaria de Hacienda." There was also the contract for publication of the six volumes by the publishing house, Editorial Hermes, which represented an investment of approximately $40,000. "The project is," concluded the officers, "in a very real sense a joint Mexican-American undertaking," and "a significant contribution to Mexico's ability to develop constructively during the coming years."[34] The support of the foundation for the *Historia moderna* stopped in 1957 but that did not stop the publication of the colorful tomes, that would, as historian Enrique Krauze put it, "strike fear even among bookworms."[35]

Part II

The *República Restaurada, Vida Política*,[36] published in 1955, was modern in that it represented the perspective of the author, its patrons and its audience about the future of the country and the best ways to understand it: the book was national in scale, novel in its scientific rigor to gather information and present results, yet eloquent in style and in drawing lessons from the past for the future of democracy. As noted in the previous section, it was also an ambitious, almost extravagant undertaking whose final product included achievements as much as gaps and contradictions. This was in part the result of Cosío Villegas's refusal to engage the work of other historians whom he considered inferior in their methods. He was a modern man in that he believed in progress as a way to transcend the past.

The support of the Rockefeller Foundation was essential to the project because Cosío Villegas committed himself to it as a kind of internal exile.[37] The book was the product of the consolidation of an official party system to which he himself had contributed as a public officer of considerable impact in the negotiations of a post-war economic order.[38] He saw the Mexican regime as taking an ideological direction and adopting political practices that clearly contradicted the vision of the Cárdenas government that had made possible the foundation of the Casa de España, the Fondo de Cultura Económica and a national banking system. The changes under presidents Manuel Ávila Camacho (1940–1946) and, particularly, Miguel Alemán Valdéz (1946–1952) did not sit well for Cosío Villegas and he chose to distance himself from public life. Although he went back to work for the government in different capacities, he retained a skeptical and disillusioned view

about the link between past and present, and a constant awareness of the need to maintain certain independence as an academic.[39]

That attitude was clear in the essay he published in 1947, "La crisis de México." This article stirred intellectual circles with its open criticism of the regime and the unusual clarity with which it noted its shortcomings in relation to the 1910 revolution. From the many attacks he received, Cosío Villegas took the best lesson from Marxist intellectual José Revueltas, who observed that "La crisis" lacked a historical analysis. As Krauze notes, the *Historia moderna* can be read as a prolonged answer to some of Revueltas's questions.[40] In this context, then, the *República Restaurada* should not be read as stoic attempt to take distance from the contemporary time, but as an effort to explain it. The book has a deep presentist perspective as it projected contemporary concerns on the past. Cosío Villegas never hid his desire to make history useful.[41] Early on, he wrote to David Stevens, that "I hope … that my work will be much … a sort of 'living history,' valuable not only as a basic research not hitherto undertaken, but because of its practical significance for Mexico if it wishes to avoid in the near future some mistakes of the immediate past."[42] This approach implied a further distinction from the Universidad Nacional (already important in terms of funding from the Rockefeller Foundation): not only was the Colegio de México a place to do research and not teach, but also, through Cosío Villegas' seminar, it contradicted the historicism then beginning to prevail at the Facultad de Filosofía y Letras under the influence of Edmundo O'Gorman.[43] For historicists, the past had to be understood in its own terms, setting aside contemporary concerns in order to understand the essence of historical beings. Cosío Villegas wrote with some amusement about the inquisitorial trial to which he was subjected by O'Gorman and his colleagues at the Facultad de Filosofía y Letras, dismissing it as philosophical and otiose.[44] Nevertheless, both schools shared a common desire to understand the origins of the nation and channel their patriotism, particularly through their criticism of contemporary United States culture and its threat to Mexican identity. Cosío Villegas was indeed more sympathetic to a historiography based directly on sources, limited to "showing" what had happened, but he tried to avoid being called a positivist or an antiquarian.[45]

Many readers of the *República restaurada* knew the trajectory of its author and could read the book as a historical criticism of the Partido Revolucionario Institutional (PRI). In "La crisis de México," Cosío Villegas argued that the failure of the revolution resulted from the fact that "every man of the Mexican revolution, without exception, has turned out to be inferior to its demands."[46] In his memoirs and political columns, published decades later, Cosío Villegas reinforced this interpretation, arguing that the origin of the project was the need to understand the "neo-Porfirism" in the direction of which the PRI regime seemed to be heading.[47] By contrast, Cosío Villegas saw the period between the defeat of Maximilian and the ascendancy of Díaz as the high point of the history of democracy in Mexico. The press was freer than ever, and the debates among members of the political elite were open as in no other period. The construction of democracy out of these foundations was not easy, and it was eventually interrupted by the Díaz dictatorship, but it defined for posterity the way in which the struggle would continue. Against the small public men of the present stood the giants of that past. The restoration of the republic was, according to Cosío Villegas, "the creation of a small group of men imbued with this idea." With the support of an incipient bourgeoisie, these men defined democracy as liberty and equality (55).[48] This meant a critique of the "mass democracy" established in those countries "that invented it" (53). Against the

homogeneity and automatism of contemporary democracy, Cosío Villegas argued that the builders of democracy in Mexico saw it as a deliberative and local process.

A central methodological tenet, and one of the most influential legacies of the *República restaurada* for its admiring readers, was that history was the fruit of "of a small group of men" (53). Those of the Restored Republic in particular were "a group of men without the most remote parallel in our history because of their intellectual capacity and their moral garments" (77).[49] It logically follows that the universe of political actors must be limited: women barely register in the book (without departing from historical convention of the time) and the "liberal masses" only participate in a passive way, although they are essential for the triumph of Juaristas. The premise is that the "of a small group of men" unproblematically represented the rest of society, channeling the grievances of the majority of the population (52).[50]

The Restored Republic was the moment in which a new generation of politicians came to the fore, the product of the Reform and intervention wars (17) but it was also an era when these politicians were convinced of the need to find new ways to rebuild the country.[51] Changes in political personnel coincided with the oscillations between the search for freedom and the desire for prosperity.[52]

As a consequence of this approach, the resolution of conflicts could only be explained in reference to the interests, feelings and ambitions of those men. For Cosío Villegas, these factors are more important in the end than any social or economic causes: the reason for the constant instability under Juárez, for example, was his government's lack of resources to reward all the members of "abundant harvest of military and civilian heroes" according to their expectations and their alleged sacrifices during the wars (220).[53] The "pleiad of young generals" (84) then emerged were professionals to an extent: the history of Porfirian revolts from La Noria to Tuxtepec is the history of frustrated ambitions and the erosion of officer discipline. Cosío Villegas points to Juárez and Sebastián Lerdo de Tejada's inability to guarantee the circulation of political elites. In another useful lesson for the present, the contrast is clear with the flow of PRI party members through public office that the consolidation of Alemanismo was threatening to interrupt.[54]

This explanation forced Cosío Villegas to venture into the dangerous terrain, at least for historians, of psychological explanations and moral opinions. For the U.S. funders, Cosío Villegas argued that this was an additional benefit: "Present day events in Mexico are so closely and clearly related to the country's modern history, that the publish[ed] work will inevitably deliver a lesson, a moral lesson of lasting significance."[55] The moral aspect of the proposal was essential. It was relevant to describe "feelings" (230) as if they were objective phenomena; the most notable among them being the lack of "happiness" that drove many to rebel (228), but also including "mental and physical drain, irritability and misunderstanding", (77) "immaturity" (196), or "belligerence" (219). Some of these feelings were expressed "outside of the formal political realms" (140), in letters and gossip, and often in personal attacks in press or the tribune of congress.[56] Personal qualifications appear frequently as part of Cosío Villegas's explanation: Díaz's early modesty and "abnegation" (198, 115), or the middle-class, creole learnings of Lerdo in contrast with the indigenous ignorance of Díaz (91).[57]

The Chamber of Deputies, that occupies a central role in the narrative, translated those character traits into institutional autonomy with a considerable degree of influence (85, 202–203). Although presidents Juárez and Lerdo were able to control congress, they never managed to subdue the other vehicle of personal politics, the press. According to Cosío Villegas, the Restored Republic had "the periodical press

that was the freest, most abundant, most intelligent, deepest and most passionately concerned about national problems that Mexico ever had in its history" (70). The criticism of contemporary press, largely controlled by the PRI, was barely veiled.[58] Even into the Porfiriato, journalism continued to be a field of political combat that the government could not fully control (296, 352), as it could not limit the prestige of some journalists (38).[59] Thanks to the protection of the press, public life became "an unending and passionate debate dominated by a stubborn and brilliant honesty" (351) that ultimately explained the "constitutional relaxation" and Díaz's eventual strong hand against the press.[60]

Although he claimed to be writing a modern and scientific work,[61] Cosío Villegas inherited a historiographical tradition centered on national narratives, with the goal of reaching objectivity and the emphasis on primary sources. From its inception the *Historia moderna* sought to encompass the totality of historical phenomena. The instruction for the members and assistants at the seminar was to read all the sources and "exhaustively comb the sources so no important fact can escape".[62] Reading all the sources and allowing them to speak for themselves was the basis for the claim of objectivity: the writers and public officials of the Restored Republic were the ones who decided what was an "important fact." In his requests to the Rockefeller Foundation for support and in his methodological writings, Cosío Villegas argued that objectivity and exhaustivity were possible because the project made tabula rasa of existing historiography and built historical knowledge out of primary sources only.

In practice, a comprehensive and national history proved difficult to achieve. Cosío Villegas did not hide the fact that access to primary sources was limited. He described rat-infested libraries and ruinous reading rooms.[63] He was unable to access the archive of Porfirio Díaz, controlled by the family and only opened decades later.[64] The bibliographical references, as a consequence, are kept to a minimum. Through a system that forces the reader to open the book in three different pages simultaneously, in a 979-page volume the bibliography is reduced to 8 pages and the endnotes to 18. According to Cosío Villegas's own count, 90 percent of the references were to primary sources (35).[65] The exclusion of secondary sources goes far: José C. Valades's works are not even mentioned in this volume, and the few references to *México a través de los siglos*, a work with similar ambitions in scope and objectivity published in the 1880s and taking national history to the eve of the Restored Republic, are essential, but the title is not included in the bibliography. Justo Sierra, the most important historian of the Porfiriato, had committed, according to Cosío Villegas unspecified "irreparable mistakes of approach" (278–279).[66] As a result, perhaps, his *Juárez, su obra y su tiempo* and *México, su evolución social*, are not mentioned in the bibliography. The notes do not contain references to secondary literature, only archives and newspapers, as if nothing had ever been written about the presidency of Juárez or the ascent of Díaz. Cosío Villegas is particularly emphatic in his refusal to engage with foreign historians who had written on related topics, even though he knew their works (392). Foreigners, he claimed, could not understand Mexican history because they could not understand the vertigo of its betrayals (21).[67] He commented elsewhere, not always in a negative way, on some of the growing literature on the period, but he refused to incorporate it to the *República restaurada*.[68]

The attempt to encompass the entirety of Mexican reality had another cost. When he defined the structure of the *Historia moderna*, particularly as pressures mounted to complete the work, Cosío Villegas separated the tomes on political history ("Vida

política interior") from those devoted to social, economic and diplomatic history. The structure was not fully argued probably because it represented, in his view, a natural division of labor, reflecting the structure of contemporary social sciences in American universities where he had enrolled himself. A narrow focus on politics, understood as state, mostly federal, activity, corresponded with the focus on the "small group of men," that we referred to before. The problem was that a full understanding of the politics, at least in the first volume, involved socioeconomic factors. Cosío Villegas attributed the restoration of the republic to the emergence of a bourgeois class (56)— although without exploring its political behavior as a class and its relationship with the political elite.[69] Cosío Villegas argued that democracy could not be consolidated without a strong state and socioeconomic development. Without telegraph, railroads, modern print and education, democracy could not be established during the Restored Republic (49). In the "Segunda Llamada General," by the end of the nine volumes of the *Historia moderna,* Cosío Villegas acknowledged that he could have treated economy, society and politics in a more unified way, but soon dismissed the idea because it would have delayed things even further and because no writer had knowledge enough to safely span the three fields.[70]

Prompted by the planned structure of the series, his methodological sense of innovation, the suggestions from the Rockefeller Foundation and probably by the need to structure the financing of the project out of multiple institutions, Cosío Villegas presented the project as a seminar that would read sources, discuss them and collaborate in the production of the volumes. The job was divided between "readers," who took notes, and "writers" who wrote the volumes. This arrangement was a novelty in the profession, and led to some criticisms about the authorship of the ideas presented in the *Historia moderna* and about the commitment of young assistants and fellows who were paid by the piece. Cosío Villegas recognized, in his description of the penury suffered by the seminar, that his wife and other female participants in the collective work of the seminar played an important yet not properly credited role. Authorship was a problem indeed, as the seminar was not an egalitarian structure; Cosío Villegas earned almost ten times the salaries of some of the participants and he was the driving force behind the funding coming from the Rockefeller Foundation (reduced to his $5,000 a year salary in the last years of the seminar), and the Colegio de México and other institutions.[71] As reported to the foundation, Cosío Villegas had to go through painful negotiations with senior and junior members of the seminar to secure their commitment in exchange for the limited salaries he could offer. As a consequence, halfway through the work he proposed to the Rockefeller to reduce the number of participants and increase his own responsibility over the few remaining collaborators, even if that undermined the educational benefits of the seminar.[72]

As with the historical subjects, the personality and abilities of the historian were important considerations in the theory of the *Historia moderna*. As we saw above, Cosío Villegas's work was a direct product of the concerns and conditions of his reality, including his participation in public life. He described his role as a historian as that of a patriotic detective who must find out why things worked the way they did and "atrapar al villano" (catch the villain). The method was not entirely scientific, but came out of the "great fondness I have for my country, the despair that its troubles cause in me, the desperate thinking about why and how the Mexican did not use the opportunities that life, that history gave him" (63).[73] Objectivity was set aside and emotions overcame the author when he recognized the tragedy of Mexican history:

"The spirit is dumbfounded when it realizes the increasing divergence between ideas, desires and actions of the men, on the one hand, and the sphere of facts, seemingly inexorable, on the other. The anxious surprise is greater as the outcome seems clearer and predictable today: the dark abyss where public freedoms fell during the Porfiriato and the violent revolution that was necessary to remove it from there. "(227)

The *Historia moderna* was neither exhaustive, nor objective nor original. It worked according to the definition of the narrow limits of politics and the logic of a restricted number of actors, and their concern for the building of a solid national state as a transaction between democracy and authoritarian rule.

What was modern, then, in the Restored Republic and the *República restaurada*? Modernity, as always, was defined in opposition to the past, which in this case meant the lack of national unity and stable institutions (11–12). Independence, according to Cosío Villegas, had brought freedom too early for the mental development of Mexicans. Only during the Restored Republic had public life started to express modern concepts of freedom; only then (and this was the implicit assumption of the *Historia moderna* project), could the narrative of national history properly begin (47). It was still a narrative defined by tensions and conflicts, not yet by progress. The wars of Reforma and intervention (1855–1867) had created a "truly revolutionary climate of true French Convention" that lasted years and was expressed by the press and congress. This environment "of the most free, incendiary and daily debate was not the most propitious for the conciliatory and ordered life that Mexicans then desired." Among other things, it forced the government to be constantly on the defensive, with prejudice of good administration (69–70). Stability came, at the end of the period, at the inevitable price of dictatorship under the strong arm of Porfirio Díaz. In the judgement of Cosío Villegas, the Restored Republic was not a complete failure because it maintained the rule of the Constitution and had some institutional regularity (19, 278–279, 504–505).[74] Yet it was a frustrated moment because only authoritarianism could guarantee the survival of the country.

The *República restaurada* is pregnant with signs that anticipate the coming dictatorship. Cosío Villegas formulated this with the notion of "constitutional relaxation," the implicit acceptance of caudillo rule permeates the narrative like a fatality shared by all actors. In fact, between the Restored Republic and the Porfiriato "there is no interruption and, much less, a historical 'fault line.' " (347) Although the contradiction between freedom and order was already at play before 1876, when Díaz reached power, it was clear by then that the progressive loss of freedoms would not stop until 1908—when the democratic impulse arose again among Mexican elites, as the end of Díaz's government seemed imminent (475). The book stresses continuities, as the largest portion of the *República Restaurada*, *Vida Política*, in chronologically overlapping narratives, tells the story of the degradation of political life by *personalismo* and rebelliousness. If the result was inevitably tyranny, at least the process could be conceived as democratic because it expressed the consensus of the political elite.

One example of the paradoxes of the Restored Republic is found in the dilemma behind public men's opinions of civil peace during those years—at last imaginable after the triumph of liberals and the "second independence" proclaimed by Juárez. Intellectuals like Justo Sierra began to argue, years before it would become a motto of Porfirismo, that peace was not only "a political problem but also an immense social question." (384) Díaz offered prosperity in exchange for freedom, and most liberals, argued Cosío Villegas, took the offer (57), even though in doing they betrayed their belief that freedom alone could in the end solve all national problems. (59)

There is a teleological argument here, as Cosío Villegas assumed a direction for history (toward modern democracy and development) and used the countries that "invented" democracy as a point of reference to understand the delays. Lacking the sense of predestination of the United States, the "theoretical genius" of France and the "English patience," Mexico, according to Cosío Villegas, was characterized by the survival of prehispanic and colonial mental attitudes, (47) and by the fact that "we have fed our democratic advances more with the intermittent explosion of unsatisfied grievances than with the inspiration of faith in an idea or theory—a fact which has, on its own, made our political life agitated and violent, and our progress oscillate between deep advances and seemingly inexplicable dejection" (51). Besides a more suitable national predisposition, advanced countries had the material means to enjoy freedom and prosperity. Poverty and the consequent late arrival to modernity had created in Mexico a "mental attitude of dependency" that blocked individual thinking (50). As a result, political agitation "uprooted the Mexican" (74) and left him exposed to the changing winds of politics. Only a few "men of steel" (75) could maintain a trajectory in the direction of democracy.

Two theoretical implications in this conception of the nation's history are worth examining in detail. First, because of its teleological comparison with developed countries, the book transpires both concern and pride about the place of Mexico in the modern "concert of nations." In spite of his continuous success in obtaining support from the Rockefeller Foundation, Cosío Villegas decried, in several passages of the book, the increasing cultural penetration of the United States after World War II in Mexico, to the extent that it "would undermine Mexican values to the point of finishing them."[75] The ambivalence (for it would be too facile to call it hypocrisy) does not end there. Whereas to him, in public, the United States was a threat to Mexicanness, becoming part of the western cultural tradition was also a central achievement of national history. Cosío Villegas compared parliamentary practices during the Restored Republic in a favorable light against those of "the countries with the best political tradition" (352). The period under study was decisive because the war against the French had been the "final lap of a race in which, tired and panting, the country pretended to reach the Western World to which it had been pushed by its independence from Spain and, most importantly, by the shrinking of the world" (65). Placing Mexico within the "whirlwind of European politics," the French intervention had made Mexico part of "world" history, attracting as a consequence many foreign historians.[76]

The concept of "Mundo Occidental" had specific meanings during the Cold War, providing a historical genealogy to the alignment of Mexico with the United States against Communism. Cosío Villegas had no qualms about rejecting the Marxist perspective on Mexican history, and even to exclude Marxists from the seminar that produced the *Historia moderna* (28). Finding others' teleologies more problematic than his own, years later he explained, "We did not have any Marxists in the group and, I must confess, I would not have liked to have a Marxist contributor, not because I am afraid of Marxists, but because they already have the answer to all things in the world so it is useless to ask them."[77] Cosío Villegas did not explain that having a Marxist participate in a seminar funded by the Rockefeller Foundation might have been difficult: containing Communism was at the heart of the collaboration between private donors and public policies in the United States.[78] Although he claimed a middle ground between Communism and excessive United States influence, Cosío Villegas wrote about Communist revolutionary movements as a threat for Latin American countries, but said a lot less about North American intervention in the region.[79]

Beyond the ideological terrain, the international comparison implicit in the *República restaurada* provided another reference to judge Mexican history and its special place in Western history: in contrast with other Latin American countries that were characterized in those years by military or personalistic dictatorships (Brazil under Vargas), Nazi-philic populism (Argentina under Perón, 1946–1955), revolution (Bolivia, 1952), civil war (Colombia since 1947), or weakness to United States interventions justified by an anti-Communist drive (Guatemala, 1954), Mexico seemed a success worth understanding.[80] Not only the funding but, we argue, the readership of the *Historia moderna* involved an international dimension.

Conclusions

Cosío Villegas and the *República restaurada* left several important legacies for the discipline of history. The most positive was establishing the seminar as the structure for collaborative research and institutional support. Important historians emerged from the discussions and collaboration, not to mention the multi-institutional and transnational funding, assembled by Cosío Villegas. Even though his connections and public persona dominated the project during his years of work, he chose not to engage with other historians' production, while making explicit the methodological workings of his own historical research.. The writing of the *Historia moderna* was not a "miracle" as Krauze suggested, but a process in which multiple professionals participated and received credit.[81] The *Historia moderna* left an imprint in the development of the historical profession in Mexico. This included the driving concern about the present, the ideological exclusions and personal hierarchies implicit in the process of planning, research and writing, but also the decisive ability to establish collaboration with North American foundations. The involvement of the Rockefeller Foundation in the creation of an endowment that gave the Colegio de México some economic stability and autonomy was largely Cosío Villegas's merit.[82] This was decisive in creating an institutional framework for historical research and training.[83]

To an extent, the personal legacy of Cosío Villegas tends to cloud this institutional contribution. His public persona as a fearless critic of the regime and his brilliant and polemic prose made him a recognizable figure in public life until his death in the 1970s. That autonomy, largely based on the intellectual achievement of the *Historia moderna*, came at a cost, and the bill was largely paid by an international collaboration. It is not necessary to argue that Cosío Villegas sold his soul to the devil to explain that contribution. This chapter's goal was to show that the production and contents of this "Mexican landmark" cannot be fully understood by staying within the national boundaries of the reading and interpretation set by Cosío Villegas himself in the pages he wrote for Mexican readers. In the ones he wrote to foreign collaborators, by contrast, we have found a way to untie the hidden connections between methods and ideology, past and present, that shaped his work as a historian.

Notes

2 Enrique Krauze, "Para leer a Cosío Villegas", in *idem* (ed.), *Daniel Cosío Villegas, el historiador liberal* (Mexico: Fondo de Cultura Económica, 1984), 7.

3 For similar collaborations at the intersection of national and transnational programs see Seth Fein, "Myths of Cultural Imperialism and Nationalism in Golden Age Mexican Cinema," in *Fragments of a Golden Age: The Politics of Culture in Mexico since 1940*, edited by G. M. Joseph, Anne Rubenstein and Eric Zolov, (Durham, NC: Duke University Press, 2001) 159–98; Mauricio Tenorio-Trillo, "Stereophonic Scientific Modernisms: Social Science between Mexico and the United States, 1880s–1930s," *The Journal of American History* 86 3 (1999): 1156–1187.

4 "Incuestionablemente, la *Historia moderna de México* fue el factor decisivo en la profesionalización y modernización de la historiografía mexicana". Javier Garciadiego, "Daniel Cosío Villegas y la modernización de la historiografía mexicana," in Daniel Cosío Villegas, *Llamadas*, 2nd. ed. (Mexico: El Colegio de México/Centro de Estudios Históricos, 2001), 28.

5 Rockefeller Archive Center (hereafter RAC). Rockefeller Foundation Collection (RFC). Record Group (RG) 1.1 Projects. Series 323 Mexico. Box 22, folder 178. Excerpt from the November 1947 issue of the Trustees' Bulletin.

6 RAC. RFC. RG 1.1 Projects. Series 323 Mexico. Box 22, folder 178. Anonymous and undated document. Rubber stamped October 20, 1942.

7 RAC. RFC. RG 1.1 Projects. Series 323 Mexico. Box 22, folder 178. George C. Payne to John Marshall, through Dr. Ferrell. Mexico, January 3, 1942

8 RAC. RFC. RG 1.1 Projects. Series 323 Mexico. Box 22, folder 178. Anonymous and undated document. Rubber stamped October 20, 1942.

9 See RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. RF Appropriation 48023., February 20, 1948.

10 RAC. RFC. RG1.1 Projects. Series 323 Mexico. Box 22, folder 178. William Berrien (?) to "Dave" [David H. Stevens]. July 13, 1942.

11 RAC. RFC. RG 1.1 Projects. Series 323 Mexico. Box 22, folder 178. RF Appropriation 42095. October 16, 1942; RAC. RFC. RG 1.1 Projects. Series 323 Mexico. Box 22, folder 178. David H. Stevens to Alfonso Reyes. October 21, 1942.

12 RAC. RFC. RG 1.1 Projects. Series 323 Mexico. Box 22, folder 178. William Berrien (?) to "Dave" [David H. Stevens]. July 13, 1942.

13 RAC. RFC. RG 1.1 Projects. Series 323 Mexico. Box 22, folder 184. Grant in aid to Colegio de Mexico, RF 43125. January 18, 1944.

14 RAC. RFC. RG1.2 Projects. Series 300 Latin America. Box 115, folder 115. William Berrien, "Report on Humanities in Mexico, Central and South America," October 31, 1944, 5. In 1953 Cosío Villegas wrote to Alfonso Reyes, then president of the Colegio, that the Foundation still had a negative view of the Universidad Nacional and preferred to work with the Colegio. Alfonso Reyes and Daniel Cosío Villegas, *Testimonios De Una Amistad : Correspondencia Alfonso Reyes-Daniel Cosío Villegas, 1922–1958* (Mexico: Colegio de México, 1999), 204. Cosío Villegas blamed reactionary professors at the Universidad for preventing his access to the Porifiro Díaz archive. Daniel Cosio Villegas to Charles B. Fahs. Mexico, July 17th, 1950. RF, RG 1.2, Series 323 Mexico, Box 55, Folder 432.

15 RAC. RFC. RG 1.1 Projects. Series 323 Mexico. Box 22, folder 178. RF Appropriation 44134. August 23, 1945.

16 Foundation officials were aware of the "widespread semantic misunderstandings which have led to false comparisons between Latin American and United States Universities." "In Latin America," reported Ralph L. Beals, "the *bachillerato*, considered by most Latin Americans to be the equivalent of the Bachelor of Arts degree, is given at the end of the secondary school, normally at the end of twelve, but some times eleven, years of education. In the United States, the Bachelor of Arts degree is normally awarded at the end of a four year University course or at the completion of sixteen years of education". See RAC. Social Science Research Council. Accession 1. Series 1. Committee Projects. Box 98, folder 520.

Ralph L. Beals, "Social Science in Latin America: A Survey," 22–23. (The work in italics was underlined by hand in the original document). To approach Cosío Villegas regarding this issue was no easy task. When asked directly if the university granted the "bachillerato," in an attempt to ascertain if the bachillerato was—as it still is—the equivalent to the degree obtained at the end of senior high school, Cosío Villegas responded that "the degree of *bachiller* is granted in the provinces by the respective university (of Morelia, Monterrey, Guadalajara, and so on); in Mexico city it is always granted by the National University.…" While Cosío Villegas's words were in principal true, he abstained from touching upon the real issue: certain Mexican universities granted—and still do—the *bachillerato*, but that does not mean that the bachillerato equaled a bachelor's degree. See RAC. RF. RG 1.1 Projects. Series 323 Mexico. Box 22, folder 179. Daniel Cosío Villegas to David H. Stevens. Mexico City, October 2, 1944.

17   RAC. RFC. RG 1.1 Projects. Series 323 Mexico. Box 22, folder 178. RF Appropriation 48033. April 6–7, 1948.

18   RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. RF Appropriation 48023. February 20, 1948.

19   RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. Daniel Cosío Villegas to Mr. David H. Stevens. México May 22, 1947.

20   RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. David H. Stevens to Daniel Cosío Villegas, July 15, 1947.

21   RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. Lewis Hanke, director, The Hispanic Foundation at the Library of Congress, to John Marshall, Associate Director of the Humanities. Washington, December 2, 1947.

22   RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. RF Appropriation 48023. February 20, 1948.

23   "El seminario de historia moderna de México, según DCV," in Cosío Villegas, *Llamadas*, 215–227.

24   RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. Excerpt from CBF Trip to Mexico, Mexico City, July 20, 1949. Interview with Cosío Villegas. As we will see below, Díaz did leave records although they were not made available to Cosío Villegas.

25   RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. Excerpt from William Berrien's Memo to Charles B. Fahs. August 1, 1949.

26   "Memorándum sobre la creación en El Colegio de México de un Seminario de Historia Contemporánea de México, a cargo de Daniel Cosío Villegas." Enclosure with RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. Excerpt from Charles B. Fahs' trip to Mexico, August 8, 1949. Interview with Daniel Cosío Villegas.

27   RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. Excerpt from Charles B. Fahs' trip to Mexico, August 8, 1949. Interview with Daniel Cosío Villegas.

28   RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. RF Appropriation 50030. February 24, 1950.

29   RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. RF Appropriation 51219. December 4–5, 1951.

30   The problem of Cosío's salary that was resolved with a "small grant" "to provide the same compensation he is receiving under the current grant to the Colegio." RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. RF Appropriation 54028. February 26, 1954. See also Reyes, 1999 #7290.

31   RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. RF Appropriation 5409. February 26, 1954. In October, 1953, Charles B. Fahs reported that Cosío had showed him "his completed typescript on political history 1867–77 and some of the preliminary typescript on other sections." On that occasion, Fahs wrote on Cosío's methods: "His own work looks in excellent shape with every attempt to document in original sources each important statement. At the same time Cosío—who has something of a reputation as a stylist in Spanish—says that he is

making every effort to write in a style that can reach a broad public." RAC. RFC. RG 1.2. Series 323. Box 55, folder 433. Excerpt from Charles B. Fahs's Diary. October, 1953.

32 RAC. RFC. RG 1.2 Series 323. Box 55, folder 434. "Personal and informal" letter from Daniel Cosío Villegas to Charles B. Fahs. México City, July 15, 1954.

33 RAC. RFC. RG 1.2 Series 323. Box 55, folder 434. "Personal and informal" letter from Daniel Cosío Villegas to Charles B. Fahs. México City, July 15, 1954.

34 RAC. RFC. RG 1.2. Series 323 Mexico. Box 55, folder 432. RF Appropriation 55155. February 25, 1955.

35 Enrique Krauze, "Para leer a Cosío Villegas", 7.

36 Daniel Cosío Villegas, *Historia Moderna De México. La República Restaurada. Vida Política* (Mexico: Ed. Hermes, 1959).

37 Era por lo menos un exiliado de la profesión de economista. Enrique Krauze, "Prólogo", en Cosío Daniel Villegas, *La Crisis De México* (Mexico: Clío, 1997), 7.

38 Daniel Cosío Villegas, *Memorias* (Mexico: Joaquín Mortiz, 1976).

39 So remembers Luis González. Cosío Villegas, *Llamadas,* 241.

40 Enrique Krauze, *Daniel Cosío Villegas, Una Biografía Intelectual* (Mexico: J. Mortiz, 1980), 154.

41 Citado en Garciadiego, "Cosío", 13.

42 RAC. RFC. RG 1.2. Series 323 Mexico.Box 55. Folder 432. Letter from Daniel Cosío Villegas to David H. Stevens. Mexico, August 26, 1947.

43 Álvaro Matute, *Teoría de la Historia en México (1940–1973)* (Mexico: SEP setentas – Diana, 1981).

44 Cosío Villegas, *Memorias.*

45 Krauze, *Daniel Cosío Villegas*, 187, 189. For the parallels, see Edmundo O'Gorman, *México: El Trauma De Su Historia: Ducit Amor Patriae* (Mexico: CNCA, 1977).

46 Enrique Krauze, "Prólogo", in Cosío Villegas, *La crisis de México,* 10. See the sarcastic comparison between Porfirio Díaz and Miguél Alemán in Daniel Cosío Villegas, "Nueva Historiografía Política Del México Moderno," *Memoria de El Colegio Nacional* 5, no. 4 (1965): 16–17.

47 "El seminario de historia moderna de México, según Daniel Cosío Villegas," in Cosío Villegas, *Llamadas,* 215. The idea of Neoporfirism was formulated by Cosío Villegas en 1947 in "La crisis de México". See Charles A. Hale, "Cosío Villegas: Historiador liberal" in Cosío Villegas, in *Llamadas*, 38. Contrast, however, with the claim by Luis González that the project was the product of the boring stability of things in 1940s Mexico. Cosío Villegas, *Llamadas*, 240.

48 Hereafter number in parentheses refer to page numbers in Cosío Villegas, *República restaurada*.

49 Tenían que ser hombres por que sus virtudes debían ser masculinas: durante la República restaurada dirigió al país "un grupo de hombres sin par en nuestra historia, hombres que, además, sentían el varonil optimismo de quienes palpan que de sus propias manos está saliendo una nación". Cosío Villegas, *La crisis*, 23.

50 In all fairness, this representation had strong roots in notions of public opinion during the nineteenth century. See Elías José Palti, *La invención de una legitimidad: Razón y retórica en el pensamiento mexicano del siglo XIX (Un estudio sobre las formas del discurso político)* (Mexico City, 2005); Fernando Escalante, *Ciudadanos imaginarios: Memorial de los afanes y desventuras de la virtud y apolog?́a del vicio triunfante en la República Mexicana: Tratado de Moral Pública* (Mexico, 1993); Pablo Piccato, *The Tyranny of Opinion: Honor in the Construction of the Mexican Public Sphere* (Durham, NC, 2010).

51 Un argumento similar en los tomos siguientes de la *Historia moderna de México*: Cosío Villegas, "Octava llamada particular", *El Porfiriato* (Mexico: Hermes, 1972), v. 1, p. xv.

52 Cosío Villegas, "Nueva Historiografía," 15. Other proposals about the beginning of the revolutionary era are "hijas de la ociosidad de los historiadores, los cuales, antes de escribir la historia, se entretienen con ese gran deporte que los norteamericanos llaman su 'periodización'." "Segunda llamada general" en Cosío Villegas, *Llamadas*, 199.

53 Cosío Villegas, "Octava llamada particular," v. 1, p. xvi.

54 La revolución maderista también fue expresión del "hecho biológico" de la emergencia de nuevas generaciones que ambicionan llegar al poder. Cosío Villegas, *La crisis*, 18.

55 Daniel Cosío Villegas, "Seminar on Modern Mexican History: Its Significance". Enclosure with RAC. Rockefeller Foundation. Record Group 1.2, Series 323 Mexico. Box 55, folder 432. Letter from Daniel Cosío Villegas to Charles B. Fahs. Mexico City, October 11, 1951.

56 Cosio Villegas, *Historia Moderna De México. La República Restaurada*, 341.

57 Juan N. Mirafuentes was a "segundón" (ibid., 782) and Francisco Carreón was "político de una gran mediocridad y crudeza" (788).

58 In 1947 he had been explicit in the comparison between the twentieth century press and that of the Restored Republic. Cosío Villegas, *La crisis*, 27.

59 Cosío Villegas, *El Porfiriato, Vida Política*, v. 1, p. 429.

60 Pablo Piccato, *The Tyranny of Opinion: Honor in the Construction of the Mexican Public Sphere* (Durham: Duke University Press, 2010).

61 Alfonso Reyes to Justo Benítez, 26 May 1950, in Reyes and Cosío, Testimonios de una amistad, 180.

62 Francisco R. Calderón in Cosío Villegas, *Llamadas*, 232.

63 "El seminario de historia moderna de México, según Daniel Cosío Villegas" (from Memorias, pp. 199–209 y 276–279), in Cosío Villegas, Llamadas.

64 Cosío Villegas devotes several pages in his Memorias and a polemic article in the first issue of *Historia mexicana*, in 1951, to the refusal of the heirs of Díaz to give access to the members of the seminary to the archive of the dictator. "El seminario de historia moderna de México, según Daniel Cosío Villegas" (from Memorias, pp. 199–209 y 276–279), in Cosío Villegas, Llamadas.

65 Cosío Villegas defined primary sources as texts without an individual author like newspapers or official documents, independently of the moment of their writing, and secondary sources as books with an author.

66 In 1947 he stated that Justo Sierra wrote "nuestra historia" with "benignidad superior y distante". Cosío Villegas, La crisis, 24. México a través de los siglos, in spite of its errors, was a reference in the moment of the conception of the Historia moderna de México. James Wallace Wilkie and Edna Monzón de Wilkie, Frente a *La Revolución Mexicana : 17 Protagonistas De La Etapa Constructiva : Entrevistas De Historia Oral* Mexico: Universidad Autónoma Metropolitana, 1995). Krauze recognizes the unfair neglect of Valadés by Cosío Villegas. Krauze, Daniel Cosío Villegas, 188.

67 In the introduction to the two volumes on the political history of the Porfiriato, Cosío Villegas even claims that the emphasis of "algunos historiadores jóvenes" of the Unites States in writing local histories to understand the Revolution contradicts the "nacionales" explanations existing at the moment. Cosío Villegas, *Historia moderna de México, El porfiriato: Vida politica interior*, p. xxii.

68 Daniel Cosío Villegas, "El Porfiriato: Su historiografía o arte histórico", in *Extremos de América* (Mexico, D.F., 1949); Daniel Cosío Villegas, La historiografía política del México moderno (Mexico: Colegio Nacional, 1953); ibid "Nueva historiografía política del méxico moderno."

69 Hale, "Cosío Villegas," for the context of the production of the *Historia moderna de México*. Garciadiego points out that to incorporate society and economy to the study of history is a contribution of de Historia moderna de México and Cosío Villegas, who saw in it not a fragmentation of knowledge but a more rounded understanding of politics. Garciadiego, "Cosío", 15, 16. Besides studying economics, Cosío Villegas taught sociology in 1923. Enrique Krauze, "Prólogo," in Cosío Villegas, La crisis, 8.

70 Cosío Villegas, "Segunda llamada general" in Cosío Villegas, Llamadas, 201.

71 "El seminario de historia moderna de México, según DCV" (from Memorias, pp. 199–209 y 276–279), in Cosío Villegas, Llamadas, 219, 232, 237. A description of the organization and

routine of the seminar in Cosío Villegas, *República Restaurada*, 24–29. References to "escritores fantasmas" of the work in ibid., 41. See also Wilkie and Wilkie, Frente a La Revolución Mexicana.

72 Daniel Cosío Villegas to Charles B. Fahs. Mexico, July 17t, 1950. RF, RG 1.2, Series 323 Mexico, Box 55, Folder 432.

73 The purpose was announced with almost the same words in Daniel Cosio Villegas, "¿Dónde Está El Villano?" *Historia Mexicana* 1, no. 3 (1952): 430. In 1949, when discussing the initial theses and outline of the Historia moderna with a representative of the Rockefeller Foundation, Cosío Villegas told him that "evaluation is the major purpose." He compared the current regime with the Porfiriato. RF, RG 1.2, Series 323 Mexico, Box 55, Folder 432.

74 Hale, "Cosío", 39.

75 Cosío Villegas, La crisis, 9, 40.

76 Cosío Villegas, "Nueva historiografía política," 24.

77 Wilkie and Wilkie, *Frente a La Revolución Mexicana*, 165.

78 See for example John Andrew III, "Cracks in the Consensus: The Rockefeller Brothers Fund Special Studies Project and Eisenhower's America, Presidential Studies Quarterly, 28:3 (Summer 1998): 535–552. Perhaps this might also explain the absence of José C. Valadés from the seminar. A former member of the Communist Party and teacher at the Universidad Nacional, he published a comprehensive history of the Porfiriato. See José C. Valadés, *El porfirismo: Historia de un régimen. El nacimiento (1876–1884)* (Mexico City: Porrúa, 1941) and ibid., *El Porfirismo: Historia de un régimen: El crecimiento* (Mexico City: Patria, 1948).

79 Krauze, Daniel Cosío Villegas, 160.

80 These comparisons, and the advantages of Mexico, are explicit in the interview that Cosío Villegas gave in Wilkie and Wilkie, Frente a La Revolución Mexicana, 135–136. The agrarian reform, product of the revolution, gave Mexico an advantage over other countries where it had been done later and less thoroughly. Cosío Villegas, La crisis, 19.

81 In contrast with the production process developed by other historians, including Krauze, in which team work and institutional support for ambitious projects tend to be obscured. Claudio Lomnitz, *Deep Mexico, Silent Mexico: An Anthropology of Nationalism* (Minneapolis: University of Minnesota Press, 2001), chapter 10.

82 Reyes and Cosío, Testimonios de una amistad, 204.

83 Cosío Villegas, "Segunda llamada general" in Cosío Villegas, Llamadas, 202.

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The House at Sadi Carnot 33: Amateur Photography and Domestic Architecture in Porfirian Culture

PATRICIA MASSÉ[1]

The rich cultural experience of the Porfirian years (1876–1911) can be vividly portrayed in contemporary images. One collection of 148 photographs shows in an exceptional way Porfirian domestic space in images of the Mexico City house at Sadi Carnot 33. The photographs reveal links between architecture and the conscious integration of both personal and social aspirations. Because only scarce written sources exist for the house and its owners, this inquiry relies heavily on the images themselves. This begins with the premise that photographic representation operates as a codifying medium and information carrier, and that using the methodology of researching photographs through the manner of their production—in this particular case assembled as a collection in the national photographic archive of the National Institute of Anthropology and History (INAH)—reveals a reality that is imperceptible in other sources. Photographs such as this collection offer the possibility of discovering and broadening our historical understanding of a cultural reality.

 The name associated with the house is Juan Antonio Azurmendi, not only because he ordered its construction, but also because he made the detailed registry of its building phase, its interior, and its open areas as well as the social events held there. Photographs of the open areas reveal the photographer's interest in spaciousness and, to a great extent, landscape gardening. This analysis attempts to understand this gaze through two fundamental questions: First, why was the house, including its construction, so relentlessly photographed. In other words, what significance did the house have that justified so many photographs of it? Second, do the photographs represent the gaze or viewpoint of the architect? The answers reveal concrete facts about Porfirian culture, at least of the perceptions of the privileged elite and, in another way, they bring us closer to the capital's urban development through the construction of new buildings. The images offer the primary source for this reflection and interpretation.

The House as a Symbol of the New Mexico

The photographic series of the house at Sadi Carnot 33 offers a visual expression of the new Mexico hoped for in the twentieth century. Two particular aspects demand attention: on one hand, the images do not seem to have been manipulated in any technical way. If they were altered, it was done with such a constant formal quality that it must express admiration for the house and the pleasure of photographing it. On the other hand, the images show the construction of the house, most of its domestic interior, and its open areas, especially certain aspects of the garden and landscaping. These registries seem to testify to a special attention or at least a strong interest in the house; it did not last.

Today the house is a derelict building on Sadi Carnot Street in the San Rafael neighborhood in the north of Mexico City. It goes unnoticed, despite its history as a one-time example of architectural modernity. These photographs restore its visibility and they allow us to see its moment of splendor, when it provided a comfortable place for a family that enjoyed it, although not for long after its construction in late 1897.

The life of the house since the early twentieth century tells a different history. It becomes unsettling once we approached it in detail, seeing the magnificent representation, especially the carefully designed garden and orchard, in Azurmendi's photographs. The physical condition of the house, as demonstrated and appreciated in the images, was not maintained over the years. The life of the house was soon marked by loss. It was sold in 1902, and the property has suffered successive damage. The initial owners, the Azurmendi de Teresa, enjoyed it for scarcely five years. Then the Duarte Pedrera family from Yucatán bought the house and had it for three generations. Only a year after the new couple had settled in the house, the wife, Juana Pedrera, died and her husband, Eulogio Duarte, followed her the next year, leaving eight children as heirs. One of the daughters, who married the lawyer who had arranged the purchase of the property, kept the house for twenty years. Afterwards another daughter, Amelia Duarte Pedrera, along with her husband and children lived in it for twelve years, from 1922 to 1934. After that date, the family rented the house to six different educational institutions until it was bought in the 1950s by the Sisters of the Incarnate Word as a permanent school.[2]

The photographic plates in discussion were donated almost thirty years ago to the INAH, lacking practically any information about their production, or their purpose. The documents that register their accession only mentioned the owner of the plates (the house owner), the street where the house was located, and the approximate date of the images.[3] The photographs, nonetheless, confirm the identity and some information about the house and this has been verified in written records. First, the building still maintains the date inscribed on the column next to the entrance gate, November 17, 1897 that indicated completion of construction. Second, number 33 was originally given to the main entrance and the carriage entrance received number 45. An early, seemingly minor, change resulted in confusion about the house. As soon as Juan Antonio Azurmendi sold it, the house address was changed from 33 to 13. This circumstance has ultimately sunk the history of the property into disorder; the loss of its original identity has baffled those who have tried to find it today.

Photography during the Porfirian era devoted a great deal of attention to the exteriors of new houses. The newly-built residences were recorded as symbols of modernity. From the pages of *El Mundo Ilustrado*, in its photographic section entitled "Modern Mexico," the city was praised for its new urban physiognomy, with photographs each week showing a series of newly-constructed buildings that illustrated the spirit of material progress.

In contrast to these, the editors referred to the buildings of the past, old colonial houses that created sad and gloomy locations in the city. The new lifestyle included among its social imperatives photographs of the modern private home as a photographic testimony that symbolized the mechanized modernity.

The Azurmendi photographs give the house a surprising documental dimension. The camera gave splendid coverage to the house as a material reality, which facilitated a complete visual recovery. Although locating the interior spaces required a turn to oral sources to place them correctly. The morphologic and topographic recovery was accomplished in a perspective drawing of the house, which resulted in a sketch of the general lay-out, with the purpose of estimating the distribution of rooms. (Plate 1) The sketch was put together based on the property's dimensions. Written records reveal that between 1895 and 1896, Azurmendi made three purchases of lots 44, 45, and 46 as well as two-thirds of 43 from the old Rancho del Aguacatito. He also bought 379.18 square meters from Mauricio Porraz, owner of the Tívoli de San Cosme. (Plate 2) The Rancho del Aguacatito properties were on the street originally named "Prolongación del Sur." When the street was renamed, it demonstrated the Francophilism of the period when it was given a name in honor of the president of the Third French Republic, Marie François Sadi Carnot, who had been assassinated in 1894.

Surprisingly the photos also provide information on the history of Colonia San Rafael and the two phases of its consolidation as a Porfirian urban project. The neighborhood's two phases had had been preceded as a modern urban project only by the Arquitectos and Santa María la Ribera neighborhoods, both established during the mid-nineteenth century on the high lands of the western outskirts of Mexico City. (Henríquez G. y A. E. Villareal, (1995) and Morales, M. D., (1978). (Plate 3) The first phase of San Rafael was the work of the San Rafael Realty, authorized in 1890 to divide the Rancho del Cebollón into lots, acquired by a group of French businessmen. In this first phase, the city council authorized the neighborhood in 1891. Then, the second phase in 1897—identitfed through the notary papers for the house—formalized the area where Juan Azurmendi's property was to be located. This embraced the annex of house number 37, 1ª calle de la Rivera de San Cosme, that had been the property of General José María Couttolene and engineer Emilio Dondé, previously known as the orchard of the old Rancho del Aguacatito. The area was bordered by Calzada de la Garita del Calvario on the south and the Ribera de San Cosme on the north. Its division into lots was recorded with the notary a few months before the completion of construction of Azurmendi's house. This reveals that he was one of the buyers who had anticipated the formal division of the lands.[4] This information has been decisive in dating the photographs of the house.

Who was Juan Antonio Azurmendi and what determined the photographs he took of the house? The person most intimately linked to the Sadi Carnot house grew up in a period of favorable economic conditions, in a home established in Mexico City by a businessman who had migrated from Basque region of Spain. The father was inspired by the wealth accumulated by his close relative: Antonio Beistegui.[5] They were both from Villa de Mondragón, in the Guipúzcoa region. The father established a reputation as a great expert in the production and commercialization of cashmere and as an investor in Spain. Under the capitalist logic of the time, he joined other Mexican businessmen in the establishment of the Mexican Merchant Bank and then the Mexican National Bank. He also invested in mining as well as in other sectors of the economy.

Azurmendi, the son, followed the profession of his father, strengthening his position in the financial world without having a direct relation with the production of goods. He

acted as the manager of a good part of the capital of his wife, Dolores de Teresa, and her wealthy family—that of the prominent businessman Nicolás de Teresa, one of the most influential and powerful financiers in the 1880s.

Based on the detailed observation of the 372 photographic pieces that make up the collection, I have determined that Azurmendi practiced photography for many years as a highly creative and pleasurable activity. Early in his life he purchased some photographic equipment to which he devoted himself apparently with particular dedication to taking photographs of the family's properties.

What did the large number photographs taken of the house commemorate? Among the possible motivations, we detect an affective, or emotional, value. The images promote, beyond the documentary exploration, a view that in and of itself is constructive, where time and space acquire great importance as defining dimensions of the image. The plates, in fact, offer a vision of the more public spaces of the house. The garden shows an open composition that covers wide zones. The photographer's fundamental interest resides in representing the relationship of the architectural mass with the spatial and the esthetic effects that the architectural elements offer in general through the interplay of light and shadows. A horizontal frame tends to predominate; the human figure is noticeably absent, although it does appear as an element linked to nature. Contrasts and normal illumination predominate (a wide range of grays between the pure black and pure white). That is, without too much emphasis and without an excess of the drama, the views are generally frontal; with a depth of field that keeps the scene in focus up to a medium shot, consistently based in the lineal perspective. (Plate 4)

Space has primordial importance in the representation, whether it poses the architecture as a system of symbols implemented within a space, or it poses the natural space itself as a system of symbols susceptible to segmentation and articulation. In either case, the selection of zones of reality as well as the emphasis given to determined aspects of reality—with the purpose of making them "worthy" to be photographed—makes clear an unequivocal subjectivity. (Plate 5)

Landscape as a subject drew attention to the aspects related to the architecture, which prompted the photograph in the first place; not only the finished building, but also its construction and that of the garden too. Although this relationship is only one of several in which a human being would modify the point of interest of the image, granting emphasis to the scene, I will direct analyses only to the photographs that have a clearly defined interest in the architectural.

Construction Practices

The photographs illustrate the world of builders that appear as part of Juan Azurmendi's world. Among the fifteen photographic plates dedicated to construction, ten of them record the construction of the house at Sadi Carnot 33 and 45. They show a close relationship with certain master masons, engineers, and architects.

The link between photography and construction is confirmed in a particular way in an image that focuses on the work of stonemasons. (Plate 6) The composition shows an accentuated hierarchical relationship between two individuals who seem to be holding documents: one can guess they are the architects or the master masons because they occupy a place that distinguishes them among the group of workers. Several features mark the hierarchy: the white robes that they are wearing over their suits, the proximity

of those two individuals to the two big stone quarry blocks and, especially, the visual borders provided by the pair of trunks between which they are posing. Also, the older one has a forward position in relation to the other, who seems younger, so the distance between the two might indicate hierarchy. On the other side of the border, marked by the two trees that flank them both, in the same medium shot, are various stone quarry cuts that can be seen along with a row of ashlars (that is, stone slabs) one on top of the other, perhaps for selection; while in the background of the composition, the stone quarry has been left out. This is a scene in which the reference of a space that can be identified is missing, so the relationship between the two individuals who have not been identified (but who are represented in a superior position) and the work of the stone quarry acquires significance as a photographic event.

The participation of the camera in the staging of work could have been motivated by the visit made by the two architects to the quarry. That the moment became a photographic event shows a relationship that only had significance in the construction world. We can imagine perhaps that we are dealing with a selection of blocks, perhaps destined for the ceremony of placing the foundation stone of a given building, but the absence of data about the image prevents us from getting closer to the event, which the photo has recorded with great sensibility. This image becomes paradigmatic of the visual emphasis given to the construction work in the Azurmendi photo collection.

There is a less clear visual relationship than the previous one—in which the horizontality of the frame and the selection of the pair of trunks tend to frame the two individuals observed in the medium shot. Even when the pose of the two individuals seems to be less studied than the previous image, the same elements are used which direct attention towards the area framed by the trees. In this area we see a pair of individuals whose placement in a medium shot suggests a close relationship, while in the background several construction workers can be seen working.

Notice that the older person wearing the convex hat seems to be the same person from the previous image so, to the familiarity of the composition, one must add the presence of the same person in two of the construction photographs. Although the individual still has not been identified by name, it is interesting that he participated in different photographs related to the construction. This suggests he was either an engineer or an architect. Indeed in a third image we can estimate his presence. In this photograph, the individual appears at a distance with his back to the camera, preventing easy identification; nonetheless, his body size and type, and, above all, the close relationship he has with the individual next to him makes a connection with the previous images. We also see him separated from the workers in all three photographs. (Plates 7 and 8).

Not being able to identify the individual, who seems to be over forty years old and the person in charge of the house's design (I'll argue this later), we conclude he is an architect or engineer. According to architect and civil engineer, Manuel Francisco Álvarez, architecture and engineering students used to work as interns at construction sites, where they learned in detail different construction processes, such as bricklaying and woodwork. When Cavallari was the professor, he took his students to visit his constructions sites, or to the hydraulic construction works, as well as to the demolition of convents. They visited important construction sites across the city. In this way, he placed them face-to-face with real construction problems and actual solutions.[6]

With this teaching method in mind for architecture and engineering students, one hypothesis suggests that the person who appears in the photos is a professor who visited

the construction on Sadi Carnot Street. Perhaps he was an important individual in the construction business, if not in the architecture field; the photographer certainly thought he was.[7]

This assessment opens a spectrum of interpretative possibilities for the photographs that goes beyond the emotional relationship of ownership of house. In this case, not only the photographs of the construction, but also many of others taken in the different rooms of the house, or of the different activities in the garden of the Azurmendi house as well as his brother's house, could have been an effort to create a registry linked to certain didactic purposes, or simply to track the process and achievement of the work. This would place this photographic series of the built environment at the testimonial level, perhaps because the construction project's director had professional arguments among the community of his colleagues, or with another expert or a group of engineers.

The Garden and the Time

Did the photographs of the garden, where the vegetation acquires focus, manifest a love for nature? We know that this romantic sentiment was instilled among well-educated youth in the nineteenth century. Nonetheless, in the Azurmendi photographs the sweet atmosphere of nature, associated with a sensualist gaze, is uncommon. No room existed for a gaze that rendered a tribute to the emotions, or that encouraged learning about nature, which the youth from the nineteenth century bourgeoisie were urged to do (Gay, P. (1992)). In general terms, the camera becomes the instrument in the service of the contemplation of a space transformed as a photographic object. As such, space was subjugated to a precise order, often so it could guarantee symmetry. At times a gentle atmosphere exists, which soft light contributed, while in images the drama occurs through the contrast of light or it marks the rhythm in the image.

The type of observation that tends to activate the photographic gaze of the garden in many cases gives away to the fascination with certain components of the photographic code, such as the perspective or the depth of the field from the precise details of a total-izing space. In this sense, Azurmendi turned his gaze toward the garden again and again as far as it provided him with enough elements to play with the possibilities that the photographic equipment offered him. At the same time, the garden could represent nature subjugated to a series of rational boundaries where order imposes itself. (Plates 9 and 10)

Such an emotional relationship of closeness can also be appreciated in those photo-graphs where the temporal line of the space—as marked by the vegetation—that we recognize as a location is repeated, or scenes photographed with a similar point of view. Perhaps the repeated registry aspired to a description of temporal changes that took place. In images 366382 and 366228, we notice a change in the frame, derived from the type of camera used. In the first case, it is a large format plate (24×18 cm), while the second is medium size (10×8.5 cm). Since this is not the only case in which certain loca-tions are repeated with modifications in the frame, the photographs make a direct con-nection between the photograph and the gardening which expresses one of the central obsessions of landscaping: the perspective. (Plates 11 and 12).

We should not overlook the fact that the knowledge and professionalization of horticulture and gardening were in early stages of development, meaning that the commercialization of plants was not only difficult, but was the specialty of only a few experts. (Pérez R. (2003)). The Azurmendi house project may have been awarded to the

engineer-architect Daniel Garza, who directed at least four construction projects for the Teresa de Teresa family.[8] He was an expert in hydraulic architecture, so he may also have designed the lake as well as the garden. In the same way he could have done the enormous garden with the lake at the De Teresa's house in Tacubaya. In that case, we should note that Garza's professional work connected to that of the engineer Gonzalo Garita, whose knowledge of Mexico City's subsoil would have been particularly useful in the realization of the works connected to the garden and the lake.[9]

The conscious sensibility of the photographic gaze determined the introduction of certain vegetables. One circumstance that could justify the photographic attention could be the possible friendliness between Azurmendi and the engineers and architects in charge of the design and the execution of the works. A revealing photograph of the actions involved in recording the house shows Juan Azurmendi himself pulling a large format camera. It shows a pair of individuals holding the backdrop used to photograph Mrs. Azurmendi, who is accompanied by her two daughters. The individual assisting the photographer, the one shown in full-length holding the backdrop, is Daniel Garza. This identification results from my conclusion that it is the same person whose portrait, along with photographs of some of his most important works, was circulated in an extraordinary issue of *El Mundo Ilustrado* in 1897 that advertised his professional services.

The image makes clear that the relationship between the photographer and person holding the backdrop is one of absolute camaraderie. Moreover, we should note that one photographer is photographing another, that is, camera operators acting at the same time. This relationship pretends to be genuine, but had to be staged because photographs were not instantaneous and the photographic equipment used by Azurmendi was the same as that used by the second photographer. Such a large format camera did not permit a surprise shot. (Plates 13 and 14)

The creation of a scene of nature designed for private pleasure included several large trees integrated into the design that had been there prior to the creation of the neighborhood. The lake and the area identified as an orchard were the object of photographic attention as they were created. The latter shows that the selection of what was photographable depended on construction, more than place or action. We could deduce then that function motivated the visual registry of the location. (Plates15 and 16)

Taste, Ostentation, Lifestyle

The observations derived from the photographs can be placed in a more sociological, and thereby a more abstract, framework that gives value to the evidence according to its implications for family aspirations. These arguments will be posed in the following terms: The Azurmendi as well as the Escandón and many other wealthy families photographed their houses because in that way they represented and exhibited expressions of their lifestyle. Photography allowed them to flaunt their taste expressed, as described by Pierre Bordieu, as a tendency to appropriate material or symbolic objects. No evidence exists that the photographs were objects that allowed for the re-appropriation of the house, but photography can be understood as a symbolic practice and as a presumptuous act of modernity. It should not be forgotten that photography burst onto the nineteenth-century scene as a suitable instrument to make the act of looking an act of appropriation, to help believe that a space could be possessed to the extent that it was controlled by the gaze created through the intermediation of the camera.

Moreover, the photographs examined here provide an idea of taste. This may also express the pragmatism of the builder constructing a professional network with other builders at the end of the nineteenth century in Mexico City. Although it may or may not identify him as an architect, Juan Antonio Azurmendi has an authorial presence. He established the visual guidelines that determined the locations of the camera, even if he did not take all of the pictures. The photographic registry of the construction of the house and garden, and its finished rooms and landscaping, not only display the owner's pleasure but function as an expression of his taste.

Juan Antonio Azurmendi's approach to the domestic space, although it is through photography, makes clear a symbolic expression in a social sphere. By reading these photographs as signs of taste, we discover a channel for its exhibition mediated through a process of re-appropriation of the locations. The fact that the spaces of the house are photographed offers an image that reproduces, represents, exhibits, and preserves the expression of a lifestyle. Azurmendi makes clear that photography in Porfirian society came to satisfy precisely the need to convert lifestyle into spectacle. The Porfirian house, placed at the intersection between the public and the private, existed between the ritualistic space of the home and the social space created by exhibition.

In this context, the new world of the builders seems to be incorporated as a sign of the lifestyle that the photography was demonstrating. This makes the relationship between Azurmendi and the construction profession significant. They both played a protagonist role as strategic social actors who decided, after the restoration of the Republic in 1867, the physiognomy of the modern Mexico City.

Photography had the social function of prestige, or reputation, that it played out symbolically in the center of certain social circles eager for recognition and affirmation within the entrepreneurial Porfirian elite. This relates to "conspicuous consumption", as termed in 1899 by Thorstein Veblen, when industrial production and social consumption allowed the use of sumptuary goods not to meet needs but to achieve social prestige. (Baudrillard, J. (1972)).

In the case at hand, photography served as the handmaiden that symbolically activated a system of social values and of status. Such an interpretation, based on the approach of Jean Baudrillard, privileges the exchange of value of the photographs under review at the symbolic level, based on who had access to them and who received prestige from them. The photographic representation of the Juan Antonio house could be considered a way of using or consuming the property. If we relate the act of photographing the property with the act of enjoyment, we could relate it to the act of the symbolic consumption of the house.

Photography had a mediating function between individual consciousness and the outside world. From this perspective, we can place Juan Azurmendi at the intersection of this experience, which in the social sphere belongs to a period in which modernity had, among other things, an interest in photography. In this case, we can conclude that the perception of the house was more than the cult of material interests, as the images captured personal feelings of visual pleasure and even symbolic prestige. These feelings were intentional possibilities of the image. Photography fixed the images, giving them a reality, but the technology also made possible those images. If the photographs, as visual objects, exhibit an applied aesthetic quality to the cult of the material, they not only serve as a sort of apology for the material misfortune in which the house finds itself today, but also exaggerate the value of the images by granting them exemplary rank. Nevertheless, each photograph captured part of the cultural panorama of the house, from construction

through completion, and each photograph opens a window to investigate connections within the realities of Porfirian social life.

Notes

1 This essay was translated by Diana Montaño of the department of history, University of Arizona.

2 The history of the house was obtained through an interview with Concepción and Eulogio Escalante Duarte, México City, 2004.

3 The absence of any identification, other than the initials JA on five of the plates in the series, suggests amateur photographic production. The archival accession document is dated April 6, 1981, and registered with the incorrect name Arzumendi (sic), so this research began with the identification of the actual name.

4 Archivo General de Notarías de la Ciudad de México, Notario 28, Gil Mariano León, protocolo del 8 de junio de 1897.

5 The Basque immigrant Juan Antonio Beistegui (this is recorded without an accent as I found it in the notarial documents) had a major role in this speculation, commerce and mining, as well as in the activities of foreign mercantile houses in Mexico beginning in the decade of the 1840s. He was quite active in commerce in Guanajuato and Mexico City and he was registered as the owner of commercial houses that had investments in the textile industry after 1854. (Meyer, R., (1978)).

6 Researcher Guillermo Tovar de Teresa provided a helpful discussion, and the recommendation and generous assistance that enabled me to consult the papers of the engineer-architect Manuel Francisco Álvarez, where I found this information.

7 Manuel Francisco Álvarez received the title ingeniero-arquitecto in 1864; it had first been created in 1857. Engineer-Architect Álvarez had a strategic role in the institutional development of this professional career. He put a great deal of effort into the early development of this degree in the Academy of San Carlos. The majority of his later publications between 1902 and 1924 dealt with the profession and he wrote what can be considered the first history of it. Not only did he dedicate this volume to Dr. Cavallari, but also, in a series of his writings, he strove to publicize the details of the plans of study, their modifications, and the performance of his colleagues in the construction field. Most of his publications included a large number of photographs; many of them (many that he took) are of construction sites and include portraits of engineers and architects from San Carlos. I have reviewed these portraits, trying to identify some of the persons in the photographs of Azurmendi, during the construction of the house on Sadi Carnot Street. This effort has not been successful.

8 Based on assessment and comparison of family testimonies about various projects designed by Ing. Daniel Garza and completed by Ing. Gonzalo Garita, among them the famous Mercantile Center (in the former Agustinian Hall in the Zócalo), historian Guillermo Tovar de Teresa concludes that the Sadi Carnot house was the work of Garza (Interviews, 2006 and 2007). We know that Garza requested authorization to take the examination for the engineering-architectural degree at the Academia de San Carlos in 1890, and he was successful (Sánchez Arreola, F. E. (1996) 139).

9 Gonzalo Garita (1867–1921) graduated from the national military school (la Escuela Militar de Chapultepec) as did Daniel Garza. He graduated as an engineer with the rank of lieutenant in 1888. He directed various Porfirian public works in Mexico City, such as the Independence monument, la Columna de la Independencia, the Post Office (1902–1907), and was in charge of beginning the construction of the Palace of Fine Arts, between 1904 and 1905. See www.sepomex.gob.mx/.../EdicionConmemorativaPalacioPostal. The son of Architect Garita married the daughter of Francisco Azurmendi, the brother of Juan Antonio; this established the link between Juan Azurmendi and the architect.

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CHAPTER TWENTY ONE

Disorder and Control: Crime, Justice and Punishment in Porfirian and Revolutionary Society

ELISA SPECKMAN GUERRA

The study of crime, justice and punishment has been approached from different perspectives. This chapter addresses the subject first through statistics, and then from a socio-cultural perspective in order to examine the different forms of delinquency, from brawls to social banditry, and the diversity of criminals, from duelists to robbers, including individuals such as women killers—called matadores de mujeres.[1] Without departing from cultural history, the chapter discusses the visions of criminality held by experts and other social commentators, such as the police, journalists, men and women of letters and popular song writers (corridistas), and considers mentalities—values, imaginaries, sympathies and prejudices—about crime. Although, to a large extent, these visions explain the reactions toward and the sanctions of the criminal, both the position and the interests of everyone involved must also be considered. The chapter also takes into account the overall legal design and police performance, justice (formal and citizen) and punishment (capital punishment and imprisonment). Lastly, the chapter concludes with a discussion of extra legal, unofficial, individual and collective justice and punishment.

   This analysis not only examines crime through different approaches, but also considers regional differences and changes over time. In other words, first, the chapter examines the impact of political, economic, social and cultural transformations on crime, its explanation and its treatment.[2] Having said that, the chapter has two limitations: in the space of a chapter it is only possible to note ideas and present outlines, sacrificing some topics and examples; and then there exists an absence of studies for the Revolution years and certain regions of the country. Nonetheless, the recent interest in these topics, with many studies still unpublished, allows for general coverage of the period and provides many regional examples. This allows for the chapter to accomplish a second goal, to review the state of socio-cultural research on crime, justice and punishment in Porfirian and revolutionary Mexico.[3]

Table 21.1 Criminality (1871–1930)

	Suspects				Convicted				
	Men	Women	Total	Percentage of total population	Men	Women	Total	Percentage of total population	Percentage of total population
1871					12,383	1980	14,363		
1872					10,644	2,348	12,992		
1873					12,944	2,360	15,304		
1874					13,762	2,452	16,214		
1875									
1876					9,813	1,688	11,501		
1877			22,307	.23%	11,464	2,178	13,642	61.15%	.14%
1878					17,075	2,947	20,022		
1879					15,895	2,490	18,385		
1880					14,322	2,579	16,901		
1881					17,127	2,840	19,967		
1882					15,990	2,580	18,570		
1883					15,790	2,316	18,106		
1884					14,320	2,501	16,491		
1885			27,689	.25%	14,830	2,722	17,552	63.38%	.16%
1886			37,785				21,156	55.99%	
1887			35,226				20,650	58.52%	
1888			34,695				19,734	56.87%	
1889			35,300				19,293	54.65%	
1890			37,275				19,811	61.38%	
1926	30,424	4,405	34,829		9,780	1472	11,252	32.30%	
1927	28,078	4,289	32,367		9,361	1,569	10,930	33.76%	
1928	34,683	5,930	40,613		9,031	1,461	10,492	25.83%	
1929	34,893	4,710	39,603		9,624	862	10,486	26.47%	
1930	37,658	4,686	42,344	.25%	9,294	1,091	10,385	24.52%	.06%

Criminality

Statistics show the tendency and profile of crimes and criminals over long periods and throughout the country. Nevertheless, their biases that reflect the interest of the institutions that created them, problems (different data entry criteria and unskilled personnel) and limitations (many crimes go unreported and no information exists for several years) create problems for analysis.

These biases, problems and limitations are evident in the statistics for the Porfiriato and the Revolution. The numbers vary by year and source, and the variation of the criteria calls for the division of information into two series: one dedicated to alleged criminality or to the suspects, and the other to convicted criminality or those individuals sentenced by judges. As Table 21.1 shows, the information available for the first series covers 1886–1890 and 1926–1928, and for the second series 1871–1890 and 1926–1928.[4]

The series are short but interesting. The figures for the Porfiriato indicate an increase of both suspects and sentenced. Nevertheless, the rate of increase is generally smaller than population growth (for example, in 1877 there were 22,307 individuals tried and 27,689 in 1885, but the percentage in relation to the population is practically the same), although the percentage is higher in some regions. In the Federal District, although the population went from 230,000 inhabitants in 1877 to 471,066 in 1910, the population of criminals increased at a faster rate. If there were 3,782 individuals sentenced (1.57 percent of the population), in 1910 their number reached 14,929 individuals (2.07 percent). (Statistics come from the criminal division and charts from the Attorney General). In the case of the Federal District, the years being compared have a larger period in-between (1877 and 1910), while the period considered for the nationwide figure is smaller (1877–1885), which creates the assumption that the criminality rate could have continued to increase in the following with a similar tendency to that of the capital.

The earliest available data for the revolutionary era comes from 1926 and the information registers a lower crime rate than that before the insurrection. The decrease is more noticeable, with convicted criminals as the number of suspects remaining more or less stable, particularly in relation to the total population. It may simply mean that judges were less severe. Nonetheless, a clear decrease occurred at both levels of the Federal District. There were 12,344 persons tried in 1902 (2.28 percent of the capital's citizens), and in 1929, 11,532 (0.94 percent). The numbers sentenced were 14,929 (2.07 percent) in 1910, and in 1929 3,310 (0.27 percent). (Quiroz Cuarón (1939))

For some years, the statistics offer information by state, which allows for comparisons. Taking population density into account, between 1871 and 1885, the Federal District registered the highest crime rate (with an annual average of approximately 10 persons convicted per every thousand inhabitants), compared to rates in Veracruz (5), Hidalgo and Zacatecas (3), and Oaxaca, Sinaloa and Sonora (2). Between 1926 and 1928, the states with the highest proportion of accused (between 18 and 10 a year per every a thousand inhabitants) were Baja California Norte and the Federal District, followed far behind by Aguascalientes, Campeche, Coahuila, Chihuahua, Durango, Guanajuato, Morelos, Querétaro, Quintana Roo, San Luis Potosí and Tamaulipas (with between 5 and 2 per thousand).

The statistics reveal that men formed the majority (between 80 percent and 90 percent) of the total number of criminals, and they were between 18 and 50 years old (about 90 percent), while the population had the same proportion of men as women, and a

large number of children and youth. Therefore, the gender and age of the criminals do not reflect the characteristics of the general population, but does match it in other characteristics. About 70 percent of the criminals did not know how to read and write (with a higher percentage of female criminals), which reflects the nation's high illiteracy rate and women's lower access to education. The majority were tried in their birthplaces, but with some variations: 91.16 percent for 1871–1885, 79.98 percent for 1876–1880, and 73.38 percent for 1880–1885, which shows a growing population mobility, facilitated by the railroad and a consequence of the uneven economic development, as ports, industrial regions and cities attracted impoverished peasants. Although mobility favored cities and the percentage of the urban population increased, the majority lived in the countryside. In 1910, for example, 70 percent of all Mexicans lived in communities of less than 2,500 inhabitants). Therefore, it is not surprising that the majority of convicted criminals said they were farm workers (more or less half), artisans and industrial workers (less than a third part) and domestic servants (one tenth of the total, but the majority of women). Nor are the regional and temporal variations surprising. The percentage of farm workers is larger in 1871–1885 and for states such as Chihuahua, Durango, San Luis Potosí, Jalisco, Guerrero y Chiapas, while that of artisans and industrial workers is larger in places such as the Federal District and Nuevo León and increases over the years. In sum, according to the statistics, most criminals were middle-aged, illiterate, rural males from the popular or working classes.

The statistics reveal these criminals committed the following crimes: physical assaults with injuries and homicide headed the list and represented almost 70 percent of the total of the small number of homicides, only a few were murders of parents or relatives (for 1876–1885, there were 127 recorded), with far larger numbers of duels (129) and infanticides (700). Crimes against property came next, less than 30 percent for 1876–1885 and less than 20 percent for 1926–1928.

Other crimes had less frequency, but the results make an interesting comparison through their evolution between 1871–1885 and 1926–1928. Crimes of fraud and perjury first represented 2 percent and then 3 percent. Crimes against morality (such as the production and sale of pornography, adultery and other sex crimes) declined from approximately 10 percent down to 2 percent; while crimes against reputation (injury, defamation, calumny) fluctuated more with an increase in the first period, from 1.29 to 3.98 percent, and a decrease to 1 percent during the second period.

Although reasons cannot be identified for all changes, an explanation can be offered for some. The smaller representation of women in the criminal population reflects conceptions of gender. It was expected for women to exhibit passiveness, self-control, docility, submission, resignation and delicacy. It was also expected they remain in the domestic space (to take care of the husband and children, while the men were the breadwinners and destined for the public sphere). Therefore, when they committed a crime they were not only breaking the law, but also violating feminine expectations. According to various writers, by transgressing what it meant to be feminine, these women ended up committing crime. The first slip robbed them of an honorable future and, in the end, made them fall into complete corruption to die or be killed (such was the fate of women in novels such as *Santa* by Federico Gamboa or *La Rumba* by Ángel de Campo). This explains why feminine transgression was such a major concern (seen as the result of secularization, modernity, reading bad materials and new fashions) as well as a menace to the family and society. There was control over feminine behavior by formal and informal institutions (family, community, church, school) and even greater self-control (Speckman

(1997)). On the other hand, the high crime rates in the Federal District and other megacities could be associated with the disorganized and uneven urban growth, as well as the difficult conditions of the cities and the rootlessness of the migrants. That is, the decrease in crimes against morality and reputation could reflect a cultural change and a lesser concern with these themes, as well as reduced attention to these crimes in periods of political and social upheaval.

Nonetheless, other changes can only be understood by considering a combination of the limitations and problems of statistics themselves, with factors such as economic development and crisis, employment opportunities or the lack of job, educational possibilities, the effectiveness or failure of the police, justice and punishment, and the popular trust or distrust [of legal institutions and officers.

Approaches to Crime and Criminals

Different authors have studied male and female criminality in Guadalajara, México, Morelia y Tlaxcala ((Dávila Ortiz (2009); Piccato (2001); Salgado (2004); Speckman (1997); Trujillo (1999)). Others, who will be mentioned in this section, have studied specific crimes and criminals (such as banditry and bandits). Together, these works investigate different characters and experiences.

Brawls (which could end with injuries or death) were the most common crime. The disputes emerged from economic disagreements, jealousy, revenge, injuries and antipathy. These took place in slum neighborhoods, streets, plazas and, often, pulquerías. The rivals used daggers, knives, machetes, sticks, tools or guns (more frequently during the Revolution).

The following examples illustrate repeated patterns. Often friends and neighbors fought. In 1893, Cayetano Ortiz and Vicente González, bakers and countrymen, went to have their regular glasses of pulque after delivering their pastries. They got into an argument that turned into a brawl. The following day they were suspicious and distrustful toward each. Gonzalez flashed a knife, so Ortiz stabbed him. A year later, in Sinaloa, Rosario Parra wounded her neighbor because she requested the return of her shoes. (*El Demócrata*, March 2, 1893; Vidales (2009)) Other women fought out of jealousy or rivalry over love. In 1928, in Mexico City, Juana Villaseñor stabbed her husband's lover. (*El Universal*, July 12) The Vázquez brothers died because they did not avoid Manuel Rosales and his friend "the stabbing king," who even terrorized the barrios' tough guys. (*El Imparcial*, August 5, 1897) Although brawls often occurred between friends or family, strangers also fought. In 1920, Gabriel Ramírez threw a file at the owner of a used metal booth because he felt humiliated by the price he was offered for his screwdriver. He then beat and killed the booth owner. (*El Demócrata*, February 24)

To allow or overlook an offense, a deception or a bad transaction was interpreted as a sign of cowardice and inferiority. Therefore, both men and women frequently fought, even though the fights took different forms or were viewed differently, depending on the social origin and gender of the opponents. If the fight was about restoring honor or it followed rules formerly agreed upon, the confrontation was considered a duel. Honor was defined as "the glory or good reputation that follows the virtue or the merit, and the opinion the individual earns with them" (Escriche ([1837] 298). An honorable man had to be virtuous (strong, brave, honorable, responsible) but that was not enough, it was necessary that everyone consider him as such a man and that his women preserve their honor (to be virgin, loyal and chaste) since, while male dishonor did not stain women,

female dishonor did affect men. For some (as shown by Mexico's dueling code, signed by military, politicians and journalists) if their honor was impugned or questioned, a retraction had to be demanded. If a man did receive restitution, then he had to make a challenge to a duel to show the falseness of the accusation and punish the one who had dishonored him. To take the matter to court would make public the question of honor and would exhibit the individual's cowardice. The male elite believed settling matters of honor was a private issue and that the government should not punish duelists.

A famous duel, as an example, was that held in 1880 between Santiago Sierra (director of the newspaper *La Libertad*) and Irineo Paz (head of *La Patria*). The newspapers had supported different presidential candidates and had soon begun to fight among themselves. Paz insulted Sierra and the newspaper directed by Sierra published a note that talked about Paz: "*La Libertad* is printed across the street from *La Patria*; if the indecent puppet we are referring to wants to boast about his manliness, he knows that he does not have to wander far to find us." The offended challenged the supposed author of the note. And thus the brother of Justo Sierra, one of the most important intellectuals of the era, lost his life. (Escudero (1936) 99–102)

Ireneo Paz was not punished. Few duelists were charged in court (which reflects the conviction that a duel should not be penalized, as well as the fact that these were individuals with very good social and political connections). In the capital, records exist of only two trials involving duelists: that of Amato and Molina in 1873, when both were acquitted despite strong evidence, and that of Verástegui and Romero in 1894, in which the men were found guilty but were given amnesty and freed. (Speckman (2005)) Duels continued during the Revolution, especially between politicians, (Piccato (1999)) but the number of persons charged with dueling declined and the last was reported in 1926.

The duel was but one way to defend one's honor. Legislators considered the possibility of avoiding dishonor (they exonerated those that acted in its legitimate defense) and reduced the sentence of husbands and fathers that killed their wives and daughters when they discovered them with lovers. Such a defense was used in the courts for men but did not extend to women. Maria Villa, alias "La Chiquita," was sentenced to 20 years in prison for killing "La Malagueña", although she claimed to have killed her because she had taken away her lover and made fun of it, staining her honor. (Buffington and Piccato, (1999)) The court ruled that, because she was a prostitute she had no honor to defend, and, even if she had, she could not use this defense, but she should have instead had a man defend her. Women were only allowed to restore or hide their dishonor, not avenge it. The crime of abduction (rapto), often a marriage practice, could only be prosecuted if the parents of victim wanted to pursue it, and, as the cases from Mexico, Hidalgo and Guadalajara reveal, in many instances matrimony or payment that restored family honor resolved the issue. (Benítez Barba (2005 and 2006); Dávila (2009) 132–136; French (2007)) In addition, judges considered mild sentences for unmarried women who had abortions or killed the newborn to avoid dishonor. In México, Morelia and Sinaloa, the women who committed infanticides (young, single, without family ties, workers or domestic servants) who argued they acted because they feared their employers or out of shame, usually spent no more than two years in prison. (Salgado (2004) 76; Speckman (2006b); Vidales (2009) 200–201).

Gender expectations shaped attitudes toward crimes against women. On the one hand, few sex crimes in the Porfiriato were reported and punished (as the victims had to undergo a humiliating physical examination and overcome the incredulity of public officials), and

these transgressions became more common during the fighting of the Revolution as women became booty for the troops. (Ávila (2000) 84–85; González and Iracheta (1987) 121; Ojeda Gastelum (2001) 283; Piccato, 124–126; Rojas Arenaza (2009); Vidales (2009) 151–185) On the other hand, domestic or marital violence imposed and reaffirmed male authority in daily life. The relationship between male beatings and female rebelliousness was explicit in some cases. In Tlaxcala, in 1888, Bernardino Meneses argued that he had beat his wife until injured because she did not come when he called her, she did not bring him his lunch, took too long whenever she went to buy groceries, and he had found her drunk. (Buffington (2005) 289–290; Dávila (2009) 99; González and Iracheta (1987) 138; Rivera Reynaldos (2006); Vidales (2009))

In sum, a certain level of violence was frequent and tolerated, but not if it ended in serious injuries or the death of the victim, because these instances crossed into the public sphere. The case of Francisco Guerrero, alias "El Chalequero", who, after a long career of theft and rape, decapitated several prostitutes, was infamous. Also sensational were the cases of several wife killers. Just as duels and brawls were judged differently, so were murderers who came from the elite class (and those who committed crimes of passion, with a dose of romantic or novelistic character) (Piccato (2001) 105)) and the members of the popular classes labeled "matadores de mujeres." Among these was Arnulfo Villegas, who in 1905 murdered his girlfriend Calorta when she left him. Some idealized Carlota and argued that she left him because she found out he was married, presenting Villegas as the typical macho who believed he had absolute authority over women and could not stand it when she stopped behaving "shyly humble," rather than give in to a "perpetual state of servitude." (*El Imparcial*, 24 October, 1905) Others demonized Carlota, arguing that she knew he had a family, did not care about taking the father's money, and then abandoned him when he had nothing left.

Both Carlotas correspond to stereotypes present in real or fictional crimes. Indeed, one just has to look at the victims in corridos. Similarly to the first Carlota, the innocent victim of the macho, was the story of her namesake, Carlotita, who refused to please a man as the corrido singer recounts: "Sad was the end of this child/who was killed by a wretch/because she did not want to follow him/he felt very insulted." On the other hand, Micaila resembles the victim who almost seems the murderer. Juan, her boyfriend, asked her not to go to the dance as his rival was to be there. She not only went to dance but she danced with the rival and that's how the boyfriend found them: "Micaila arrived first/she then began to dance/and she found as a dance partner/the rival himself/hours fly by/the clock strikes twelve/when a gun shot/went through both bodies." (Speckman (2006a))

Thanks to factors such the growing presence of women in the formal workforce, their educational and even professional achievements, the demands of the feminists groups and female participation in the armed struggle, the Revolution brought about some changes that favored women in family legislation and opened a path towards suffrage.[5] There are also perceptible changes in the view and treatment of women who killed husbands or lovers who had been unfaithful or had mistreated them. In the 1920s, several self-made widows were acquitted by the jury. Among them, Maria Teresa de Landa, the first Miss Mexico, claimed to have killed her husband, a general 20 years older, in legitimate defense of her honor. She shot him when she learned through the press (or when she knew it was made public by the press) that he was married to another woman. (for these cases see De la Barreda (2006) 3–12; Macías (2009); Santoyo (2008); Speckman (2008))

Another common crime was theft, with or without violence. The first category was theft of minor value. Others such as fraud, pickpocketing or shoplifting merchandise demanded trickery or skill. A few examples serve to illustrate the patterns. Swindlers promised the unsuspecting victim a gratuity for delivering a package and, to facilitate the task, they offered to watch over their belongings. Upon their return, they would find neither their reward nor belongings. Others sweet-talked individuals to venture into shady businesses, in which they lost their investments. (Piccato, 2005) Pickpockets, in many cases children, took advantage of crowds skillfully to empty out pockets or extract watches. The "crossers" worked in pairs: while one asked for information about merchandise or distracted the salesperson with "promising glances and flirts," the other stole items from the booths placed on the street. These were urban crimes that took advantage of crowds and anonymity, common in the cities such as México, Guadalajara, Puebla or Monterrey, which in a few years had had major increases in their populations. This concerned city residents, who without knowing each other, did not know whom to trust or even if they could trust anyone. Therefore, the fear of crime or imagined criminality was greater than that actually reported. This explains the concern of the authorities over pickpockets especially who created a sense of insecurity and tarnished the image of progress (for the elite, this was also tarnished by vagrants, beggars and indigenous). The police attempted to rob thieves of their anonymity by publishing their photographs and strategies, emphasizing that many were well-dressed, and more dangerous because they looked like "gente decente." They tricked people who believed that appearance reflected morality.

Other thefts were committed without violence, trickery or skill, usually in the dark—they were called rateros after the rats that they were reminiscent of. Once again, one could speak of repeated patterns: the rateros mostly stole money or objects of daily use from inhabitants of tenement houses. These robbers took advantage of the absence of their neighbors to enter their rooms (even breaking the keyhole). Street vendors or pedestrians also entered the building and forced their way through doors or climbed balconies to grab money or other objects. Employees robbed their employers, especially if they were foreigners. Foreign employees brought relatives to work in warehouses and together stole money that would allow them to become independent or go back to their country. Bricklayers, for example, stole the wheelbarrows they used to transport bricks to the construction site.

Distrust, based on racial and class prejudices, greeted workers and domestic servants. The book written in 1901 by Julio Guerrero provides an example; he argued that among workers "thieving" was so frequent that the workshops' employers had to search employees when they left for the day. He also described how mestiza domestic servants of "very relaxed morality" had "simultaneous and consecutive love affairs with the male-servants of the house" who, in order to give them gifts, stole money or objects from the house. (Guerrero (1977) 162–171) As result whenever something went missing, the owner immediately suspected the domestic servant. (Salgado (2004) 47–51; Vidales, (2009) 191–192) Despite differences, thefts had a common denominator: although the value of the stolen item was small, because it was stolen from an inhabited house or through betrayal of the trust of their employer or both, the petty thief could be sentenced to about five years of prison (only three fewer years than some murderers).

Other thefts were greater infractions, especially when they included violence. In the capital, in 1882, several men entered the house of Enrique Hube, the tax collector for Tacubaya. They punched him to force him to open the safe. Examples for the Porfiriato are few, but in the Revolution, looting by the troops multiplied and gangs emerged—such

as the Gray Automobile gang—that robbed houses, dressed up as soldiers, and even carried fraudulent search warrants. Like their U.S. gangster counterparts in the 1920s, they were well-armed and spent their loot in the company of luxurious women. Indeed, these thefts were more violent. In 1921, robbers sent a burst of gunfire into Rosalie Evans's car before approaching it; they immediately killed their victim. Unlike the robbers who only beat up Hube and tied up the servants, in 1928 Luis Romero Carrasco and his accomplices killed, a pulque seller named Basurto, and three female employees who were in the house so they could burglarize the building. (Ávila (2000) 81; Gabilondo (1882); Gonzáles and González Dueñas (2008); Meyer (2008); Ojeda Gastelum (2001) 283; Rojas (2008)).

In states such as Jalisco and Chihuahua, the theft of animals was the most common crime. One must recognize the difference between low-scale rustling, which in times of crisis alleviated urgent needs for food, and the actions of well-organized groups that transported large quantities of cattle, often with the connivance of authorities or hacendados, and who fled cross state and national borders. (Trujillo (1999) 150–152; Sousa (2005) 181– 224)

Highway assaults were common and government officials wanted to control banditry because it hindered the transit of people and merchandise, thus blocking the expansion of markets as well as threatening rural order. Although the Porfirian government controlled banditry, it was not eliminated, and gangs continued to rob stagecoaches and later trains, haciendas and mines, stealing weapons, kidnapping or extorting the people. In the late nineteenth-century, infamous bandits included Jesús Arriaga, alias "Chucho el Roto" (in the center of the country, based in Querétaro) and Heraclio Bernal, alias "El rayo de Sinaloa," (in Sinaloa and Durango), and in the early twentieth-century there was Jesús Malverde (Sinaloa), Jesús Negrete, alias "El Tigre de Santa Julia" (Mexico City) and José Santa Rodríguez, alias "Santanón" (Veracruz and Oaxaca). During the revolution, gangs recovered their strength and often worked with one faction or another. Alonso, alias "El Indio," started his career as a bandit at the same time as the Revolution broke out and, a couple of months later, joined the Villistas in order to use military actions as a cover for banditry.[6] These were not social bandits (Hobsbawm (1968) 27–47; Vanderwood (1986) 130–131) but criminals.

Many of these bandits, later in their lives or in the myths created after their death, gained reputations as social bandits struggling against the black legend of Porfirio Diaz. Even if they only flirted with political struggle and social vindication, they acquired characteristics of the social bandit who, unlike the common bandit, sought social change or only stole from the rich. His booty, according to this legend, benefited the community in a direct or symbolic way and he enjoyed the community's sympathy. He used violence to avenge injustices done to his family or community and to him. They were, or were reputed to be, men of humble origins.

"Chucho el Roto" was an artisan, and others came from landless and impoverished peasant families. They did not go to school, so most remained illiterate ("Santanón" and "El Indio") while a few learned how to read later ("El Rayo" and "El Tigre"). They claimed they had been forced into the life of banditry. "Chucho el Roto" and Malverde fell in love with daughters of wealthy men, who forced them to flee, and in doing so they started down the path of illegality. Others found the same path. "El Rayo" was accused of stealing silver, "El Tigre" witnessed the rape and murder of his sister by a soldier (see the movie about him filmed in 1973) and "Santanón" was accused of abduction having learned that after leaving the sugar refinery, the administrator had clubbed his mother to

death. Some fought for a socio-political change. "El Rayo" fought against Diaz, for the recognition of elections, and for the distribution of land to dispossessed communities. "Santanón" fought alongside magonistas and "El Indio" with the villistas. The cinema moved "El Tigre" closer to the Revolution and entrusted him with combating corrupt soldiers and policemen. Capturing any of these bandits proved difficult because their communities protected them. This happened with "El Rayo" and "El Tigre" (in the second movie filmed in 2001). They were only captured through deception (a policemen dressed up as a civilian made the woman most beloved by "El Tigre" fall in love with him and used her to lay a trap for him) or with rewards ("El Rayo"'s men betrayed him for money). Prisons could not stop them ("Chucho el Roto" escaped three times and "El Tigre" escaped once). Only death ended their careers. Some were executed by a firing squad after a trial ("El Tigre"); others were hanged in secret (Malverde); and others were killed by their captors ("Santanón"); while still others died in suspicious circumstances ("Chucho el Roto" fell fatally ill in San Juan de Ulua and "El Indio" was murdered by unknown persons).

They were seen, whether they were or not, as avengers of social wrongs and benefactors of the poor. This is how the corrido of "El Rayo" presented him:

> "How beautiful was Bernal/
> On his jeweled horse
> He did not steal from the poor/
> Rather he gave them money
> Oh "El Tigre"
>
> He was robber of the rich
> and a bloody jackal
> avenger of the poor
> and bold among all
>
> He was like Chucho el Roto
> and like Cristo Rey himself
> José de Jesús Negrete,
> In the name of blessed law"

More notorious was the case of Malverde, who became a legendary figure:

"Oh Jesus Malverde! You died poor, you never kept for yourself what you stole from the rich. You always thought about others first before thinking about yourself, that is why I come to you and ask you." This is a fragment of the first novena prayed to his spirit because he became a popular saint. Upon his death, the authorities had prohibited his burial and people had surrounded his corpse with stones. Overtime, people constructed a chapel at this location, composed a novena to him, and left petitions that were answered, so that his fame grew and he is today recognized as a saint in several cities.

Perspectives and Reactions

The conception or understanding that experts (jurists and criminologists) had about crime has been the subject of studies. The largest number of authors have examined capital crimes while only a few authors examine other crimes.[7] Despite the asymmetrical nature of the literature, one should not lose sight of the plurality of crimes.

Some explanations fall into the voluntary category, which considers that human actions depend on the will of individuals who are capable of differentiating between good and evil. Many people thought that alcoholism, ignorance and misery resulted in bad decisions (for example the philanthropic magazines and authors such as Zayas Enríquez (1884) and Macedo (1897)) leading to a criminal life. Catholic magazines insisted on the breakdown of religion and Christian morality, and intellectuals claimed that harmful campaigns and feminine transgressions resulted in crime. Other explanations responded to determinism, which presumes that individuals act as determined by factors of the environment or of the individual's nature expressed in their bodies. Criminal anthropology, founded by César Lombroso, worked with the hypothesis that criminals have physical characteristics that differentiate them from other people. This analysis was especially popular in Mexico, with representatives such as Francisco Martínez Baca y Manuel Vergara, who studied the inmates in Puebla to find anatomical and physiognomic attributes of criminals. The study concluded, for example, that violent criminals had a cold, arrogant, glassy stare; small eyes, generally oblique; large cheekbones; short and hawk-like noses; square chins and thin lips.

After the Revolution, biological determinism did not disappear, but the doctrine of free will definitively declined. The best example was extreme poverty, which was no longer seen as the result of apathy and vagrancy on the part of indigenous and mestizos, or as the result of an inherited physical characteristic or, in the best of the cases, as a result of cultural practices. Instead, poverty was interpreted as a product of the inequitable economic system. Poverty and criminality were seen as products of the social and economic inequality. Therefore, both the government and the society had responsibility for creating criminals.

The general explanations changed according to the criminal and the crime committed. Legislators and judges might go relatively easy on infanticides, because lower class groups considered it a serious crime, but not as serious as robbery. From the popular perspective, it was more shameful to be a petty thief. This explains "El Tigre" admitting: "I have killed but I have not robbed, I am a man but not a petty thief." It also explains the diverse reactions or the differences between "penal sanction" (provided by the law), the "judicial sanction" (provided by the judges) and the "social sanction" (reactions of the society). Neighbors, when the cadaver of a newborn was found, investigated and reported the suspect to the police. They never helped with other crimes; (Speckman (2003) they were satisfied with reporting the infanticide. Other situations did not end like that. In 1921, a group tried to lynch a man suspected of placing a bomb that went off in the Basílica de Guadalupe. In several other cases, the police stopped the community groups trying to lynch supposed "child snatchers." (*El Demócrata*, July 12 and 14, 1918, and November 18, 1921) In Mexico City during the Porfiriato, there were a few examples of lynching attempts. Among them was that of Guadalupe Bejarano in 1892. The wife of a colonel and a woman of good social standing, she took in an orphan girl and put her in charge of housework. She punished her so severely that she caused her death. Even when the woman was already in the hands of judges, an indignant crowd attacked her because they thought she might escape punishment because of her social position. This is not the only case in which individuals took action when authorities did not do their bit (or when it was feared they were not going punish the guilty). In 1924, the child María del Pilar Moreno murdered Francisco Tejeda Llorca, who had murdered her father in a political conflict and had escaped trial because as a Deputy he had congressional immunity. (Piccato (2009); Speckman (2008))

Law, Justice and Punishment

By 1876, a large segment of the national population longed for peace after decades of foreign intervention and civil war, and they saw in Porfirio Díaz the caudillo who could achieve national cohesion as well as guaranteeing tranquility and development. This explains his choice of "order and progress" as his government's slogan. Achieving order required asserting the authority of the federal and state governments, to end political in-fighting, to control social uprisings and to regulate criminality. As the heir of the liberal struggle and legislation, Díaz was determined to have the laws respected (especially the 1857 Constitution) and had to make sure public officials upheld the law (at least in appearance). He made great use of conciliation and negotiation. He placed trusted individuals in specific positions and co-opted other social leaders. He wove strategic alliances and became the central person in personal, sectarian and regional agreements. He boosted the economy, especially commerce, and connected the country through railroads. At the same time, both Díaz and his governors increasingly repressed opponents and rebels. In search of social equilibrium, he framed the fight against crime through the codification process, the reorganization of police and courts, the creation of a penal colony and several state penitentiaries, and the continuation of capital punishment. Several historians have investigated these topics.

Like other countries that adopted the liberal model and the premises of constitutional government, Mexico moved toward equality of all Mexicans before the law. The creation of the Constitution took place in 1857, but civil wars delayed its implementation. The majority of states had to wait until the 1870s and 1880s to write penal codes. Sixteen states adopted the one drawn up in the Federal District, which had local jurisdiction for common crimes (against individuals, property, etc), but had nationwide jurisdiction for crimes against the nation (such as rebellion, counterfeiting money or contraband). (Cruz Barney (2004); González Gómez (2003))

The penal codes and the criminal laws during this phase followed the voluntarism model or reflected the ideas of the liberal school of criminal law. These principles argued that healthy adult individuals had the capacity to make decisions and, therefore were responsible for their actions. If they committed a crime, they were to receive the same sentence regardless of the identity and the personality of the criminal. Biological determinism did not affect legislation, as that would have required, among other things, a differentiated justice according to the criminal subject and not the crime committed.

On the other hand, the codes reflected aspects of the mentalities themselves. Besides the previous discussion of the impact of values such as honor, the law could also be discussed as a reflection of gender conceptions, not only for civil and commercial law (which granted more rights for the father over property and children, or limited the commercial activity of women), but also for the penal laws, which prohibited women from acting as judges or jurors. It also punished more severely female than male adultery, not only because women could incorporate illegitimate children into the family but, according to the prevalent double standard, they caused greater moral harm than did men committing adultery (Speckman (2001) 23–57; Vidales (2009) 91–118).

The right of the society to punish (punishment is presented as a reaction to the violation of the social contract, created to guarantee the rights of the individual—rights that criminals have violated) is based on the responsibility of the individual, but it was limited by the guarantees given to the suspect (who could only be detained if there was enough circumstantial evidence), to the accused (who had to be tried in a process abiding by the

law, by an impartial judge, having all the means for their defense) and to the convicted (who had to receive a humanitarian punishment, proportional to the crime committed). Nonetheless, within the laws exceptions existed that authorized summary proceedings and capital punishment. These were drawn up to combat banditry or the disruption of railroads and, for all the crimes, during the revolution. (Isais (2009) 41; Vanderwood (1982) 14–46; Verján (2006) 204–207))

In order to combat banditry, the rural police force, created in 1861 and lasting until 1914, was reinforced. In an effort to have a police that was both loyal and administered by the federal government, Porfirio Díaz expanded its presence (until then limited to the center of the country), its number (the rurales increased from 900 in 1876 to 2,662 in 1911) and its functions (they were also in charge of social dissidence). They were indeed loyal to the executive (Díaz and later Madero) and they constituted a good effort to have a centralized police force, besides being an important factor in the control of banditry. If their image and legend is true, they were essential in the preservation of the Porfirian order, although recent studies have demonstrated that neither the rurales nor the army (reduced numerically and in budget) were enough to maintain a regime that, as previously said, owed a good deal to economic development, to the railroad, and to political co-optation. (Guerra (1988) 218–219; Isais (2009) 41; Vanderwood (1986) 145–237 and (1982); Verján (2006))

Besides this federal police unit, state and municipal forces existed. Urban police took charge of maintaining the streets as clean and clear, preventing public fights, keeping an eye on drunks and individuals considered potentially dangerous, such as servants, prostitutes and foreigners, detaining suspects and investigating crimes. The latter required training. Police magazines and, later on, instruction in the police academies, were committed to the creation of a "scientific" police, employing modern methods of investigation (such as the search of fingerprints or the specialist's report of fire weapons) and the identification of criminals (photographs allowed the identification of individuals already identified as criminal, but if a persistent offender gave a false name, it was possible to compare his photograph with thousands of others to see if he had a criminal record under another name. This was the significance of classified records based on anthropometric measurements or fingerprints). (Speckman (2001)) The wide-ranging policing job role, the poor pay and the deficient training failed to create the desired efficiency, nor was it possible to create a good image of the police before society. The situation worsened with the Revolution as the gendarmes became victims of soldiers, desertions and the conscription reduced their ranks, and their image deteriorated as they were linked to the criminality of the old regime and were accused of corruption. (Castillo (2009); Piccato (2001) 140–141)

The role of the police was the apprehension of criminals. Detention was followed by a trial. The objective of guaranteeing equality before the law demanded that judges applied laws in an exact manner (prohibiting the application of similar laws or the interpretation of the laws). If this practice was not followed, the affected individual could appeal To the Superior Justice Court of each state) or could appeal on the grounds of unconstitutionality to the federal Supreme Justice Court or to a federal justice. There was a trend towards the professionalization of the judges, at least of those who were in charge of the most severe crimes. Lay judges, those without legal training, continued to exist but were limited to minor offenses, and to courts in small cities or rural localities where local legal practices persisted. (Marino (2005)) Additionally, some communities admitted citizens' justice or jury trials. This practice had an outstanding history in the

Federal District, where jury trials functioned during the periods under study, with the same gap for 1914–1919. The years of most intense fighting caused many courts to close their doors, and many judges to go into exile or simply abandon their posts, leaving justice to local authorities, who were usually a rough crowd. (Ovalle (1981); Speckman (2005)) This period of juries was also the time of the great strategists and skilled orators, who prepared their witnesses and addressed public opinion, and who in long presentations sought to convince the jury by not only by resorting to evidence but also playing to convictions, values, prejudices or sympathies. They often achieved questionable acquittals that many saw as scandalous. (Speckman (2006b))

Few studies have examined judicial practice, even though opinions about it have been presented. The weight of gender in justice has been highlighted, but the argument that judges were more lenient toward women has been rejected; indeed the contrary has been found—at least during the Porfiriato. (Núñez (2005), Rivera (2006), Salgado (2006), Vidales (2009)) Judges, as previously suggested, punished two female offenses (the criminal broke the penal regulation, but she also broke expectations of female behavior). The concern about female transgression motivated some judges to punish female criminals as an example to other women. (Speckman (1997))

Punishment—ideals of voluntarism, humanitarianism and proportionality—transformed the prison in the best of the punishments. It served as an example but, in contrast to the Old Order, it did not include physical punishments and it allowed for the regeneration of the offender through education and training received in jail. The 1857 Constitution limited capital punishment therefore to adult males and to very few crimes (betrayal to the country during war against a foreign power, parricide, and voluntary manslaughter) and it proscribed a penitentiary system to redeem criminals. Nonetheless, in 1901, highway assault was added to the list of capital crimes and only some states (such as Puebla and Veracruz) abolished this law when penitentiaries were built. Even then, at least in the capital, few murderers were executed. The executions were private, but the last hours of the convicted and even details of the death were made public. The press and the penny-press allowed the public to know that "El Tigre de Santa Julia" wore his charro suit that the director of the prison gave him, that he drank coffee with milk and cognac, and that he wrote verses and a letter to his daughter. He did not confess but he did pray "fervently and from his heart." He walked in firm steps to stand before wall for his execution, and before dying, he shouted "¡Viva México!."

Since Independence, torture of criminals and suspects was prohibited, with labor or loss of liberty being the preferred punishment of criminals. This resulted in banishment from the community, through forced incorporation into the army or forced farm labor in Quintana Roo or in the Valle Nacional. Later, in 1908, a penal colony for thieves, vagrants and beggars repeat offenders was created in the Islas Marías, as it was believed that a different environment enabled a change in habit. As time went on, the most dangerous convicts and political dissidents were sent to the colony. (Pulido Esteva (2007)) The prisons were constructed in old buildings (the Belem convent in the capital or Santa Catalina in Oaxaca and the alhóndiga in Guanajuato), but penitentiaries were later built that allowed for the separation of criminals (by sex, age and dangerousness) and by phases (isolation at the beginning, and then gradual communication), to regulate schedules and allow spaces for education and work. The first modern prison was inaugurated in Jalisco (1875), followed by Puebla, Coahuila, Guanajuato and Nuevo León. When the century came to an end, Lecumberri was inaugurated in 1900 in the Federal District, with its panopticon design that allowed the watchman at the center to observe all the

galleries and the prisoners in them. Barrón (2002); Cruz (1999); Flores (2006); Padilla (2001); Pulido (2007); Trujillo (2007))

Neither the prisons nor the penitentiaries fulfilled expectations. Physical suffering continued. The prisoners suffered from hunger, disease, overcrowding and violence. The prisoners were not separated and recidivism was high. Many perceived prisons as schools of crime and believed that, rather than providing regeneration, they perfected the criminal. Nevertheless, the 1917 delegates who wrote the new revolutionary constitution did not consider changing the model, but rather concentrated on the centralization or decentralization of punishment. (Buffington (2001) 153–162; Piccato (2007)) Some years had to pass for changes to occur, (such as the elimination of the jury and capital punishment in Federal District in 1929) in the legal system and institutions of justice, prevention and punishment.

Notes

1 This type of murder is usually explained as the result of machismo and women's subordination, and the self-made widows in the 1920s were seen as battered women avenging themselves. See the discussion below.
2 I cover the Porfiriato and the Revolution, between 1876 and 1929, when the "etapa bronca" or "Wild Period" ends (Garciadiego (2004) 261), opening the path to political institutionalization and new penal codes.
3 I only mention works about Mexico, but similar experiences, ideas and research results could be found for other countries. For Argentina, for example, there are the studies by Osvaldo Barreneche, Lila Caimari, Diego Galeano, Sandra Gayol or Kristin Ruggiero.
4 The problem is not resolved by adding in the statistics of different states, as no data collection has been done on the criminality of men and women for long periods, with the exception of those for the Federal District and Jalisco. (Piccato (2007); Speckman (2001) 63–67; Trujillo (1999))
5 Lay and Ramos (1993); also see the volumes edited by Mitchell and Schell (2007) and Olcott et al. (2006).
6 For these bandits see Cázares (2008); Del Castillo (2008); Giron (1981); Ojeda Gastelum (2001); Ramos (2008); Speckman (2009); Vanderwood (1986) 130–139; Zurián (2008).
7 For the perspective of experts see Buffington (2001) 21–131; Narváez (2005); Padilla (2001) 97–144; Piccato (2001) 50–72; Speckman (2001) 71–114, Urías (2000) 145–166. For the press see Del Castillo (1998 and 1997), and for other perspectives (Speckman (2001)).

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Military and Nation in Mexico, 1821–1916

STEPHEN NEUFELD

The military, essentially the army, represented Mexico's most significant institution in its first century of independence. In myriad ways, the army manifested and transformed political cultures and nascent nationalism. Its actions built, and at times disintegrated, the young Republic. This chapter demonstrates the scope of the military's actions as armies and militias fought one another, battled rebellious peoples, and resisted foreign invaders.

Civil Strife

Amidst the tremendous turmoil that wracked the Republic through the first century of independence, were repeated, often paralyzing, internecine wars that pitted army factions against one another. Civil warfare, *pronunciamientos* (general military uprisings), and *cuartelazos* (barracks revolts) disrupted economic development and political stability (Vázquez 1992). Many thousands died. Thousands more, crippled, maimed, or jobless, plagued cities and the countryside. The nation's image and repute abroad suffered too, and with little hope of regular consistent governance, international credit proved elusive (Tenenbaum 1986). Internal strife, among armed forces both regular and militia, was a constant issue between 1821 and 1920. This shaped the fate of Mexico.

The first civil struggle was that which severed the imperial fetters of the Spanish Crown. Nearing the end of a decade of destructive and fruitless civil warring, the Royalist officer Agustín de Iturbide turned coat, and proffered a deal with rebel forces (Archer 2010). Setting the tone for army allegiance, a creeping sense of Creole national identity propped up the coup d'état with the effect of excluding the large indigenous population from political participation (Brading 1991).

The brutal warfare of the Independence era would forever be denied the redemption of a revolutionary label. Mexico would be born in blood and fire, protracted over 11 long years, and scarred by vast material destruction and persisting fears of indigenous

riot. The possibilities for broad and profound changes to society—the hallmarks of a revolution—were forestalled by Creole ambivalence in the face of racial warfare.

Distaste for the Spanish imperial grip did little to discourage emulations of the Spanish military's nineteenth-century habits of pronunciamientos and cuartelazos (Headrick 1981; Boyd 1979). That the Republic's army would become a political actor should not be a surprise; lack of political customs and consensus created a situation where the army's firepower could, and would, dictate policy (De Palo 1997; Archer 1992). Nor was this entirely unjustified. The army was the primary recipient of tax money, and nearly the only occupation to supply presidents (Tenenbaum 1992). Between 1821 and 1946, aside from civilian Benito Juárez, the presidency was held by non-soldiers for a mere two and a half years total (De Palo 1997: 29). With the political stakes so high, the army's relative restraint in interfering may be more remarkable than the frequency of its rebellion.

Winning over old Royalists was the first internal challenge. The garrison in the Spanish held fortress at San Juan de Ulúa refused Iturbide's authority and, as the last of the Royal opposition, held out until 1825 (Anna 1971). Besieged and starving, the soldiers maintained the last vestige of the mainland empire, hoping in vain for a relieving fleet to appear on the horizon. No more or less Spaniards than Iturbide or than their naval opponent José Saenz de la Barranda (Bidwell 1960), the garrison in its isolation might be better considered a civil insurgent than a foreign invader.

Other cuartelazos were soon to follow, and raised crucial questions for the makers of the new nation. Iturbide, shouted to emperorship by his soldiers, was set aside in a few years time by his old opponents from the insurgent days of the 1810s. Repudiating the emperor's pomp and regretting his treasury, the army exiled Iturbide and played a part in defining the new country through ritual (Beezley and Lorey 2001). In this it was not alone. The questions of nation, of federalism or centralism, of political trajectory revolved in many cases around the army. In whose hands should armed forces reside? Who, ultimately, would pay for the military and who would direct it? Militias, melded into the largely kinship-based networks within the various states, did not politely agree with centralist politicians that they should be relegated to an inferior station. Various militias, from *cívicos* (1825) to National Guards (1845) to Second Reserves (1901–3), played crucial roles in defining the military history of the century, and in defining the nature of the republic's power relations with citizenry (Hernández Chávez 1992; Chust 1987 and 2007; Frasquet 2007; Thompson 1990).

The national army which received a lion's share of the annual budget—at times as much as 85 percent—was predictably unenthused by federalist calls for fiscal changes or militias, and made their own political endorsements known (De Palo 1997: 25). If their concerns went unmet, the army rebelled.

More military uprisings followed. One with long lasting impacts was the 1828 *cuartelazo de la Acordada* of the *garita* (gatehouse) barracks of Mexico City. In the context of early insecurities, and with some politicians arguing for restrictions on the army and its budget, a number of important units protested and went on strike. Popular classes rose up in support of President Valentín Gómez Farías's liberal agenda, knowing that the army would not oppose, and visions of racial revolt again terrified and enervated many conservative politicians (Warren 2001). The aftermath of the Parián market riots saw the military enforce new and tighter controls over troops to avoid upheavals, or *motines*. Through the course of the century barracks gained higher walls, more guards, and stricter laws that would allow authorities to arrest men on mere suspicion of desertion.

The army also, in the wake of cuartelazos, had little hesitation in applying capital punishment to any suspected ringleaders. The army as an institution began a long decline towards a penal model, treating the untrustworthy soldiers as prisoners locked away under the supervision of armed officers, in hopes that they might be rehabilitated to civilized life (c.f. Beattie 1997). From the 1830s on, further military revolts disrupted political life with unnerving frequency (Cota Soto 1947: 26–92). Without a doubt, the strangest case was when Antonio López de Santa Anna overthrew his own presidency in 1832 (Archer, this volume).

Far less strange and with greater long term significance, the rebellion of Tejas against Coahuila and Mexico may best be considered in the context of civil war. Not an indigenous or civilian movement, or at least not entirely, and certainly not a foreign one (regardless of outcome), Tejanos successfully built a revolution able to challenge the central government (Reséndez 2005). Pro-slavery advocates who refused to bow to abolition, or to learn Spanish, made common cause with Hispanics tired of over-taxation and Coahuilan political dominance. Adventurers, like Jim Bowie and Davie Crockett, went along for the ride. When a federal army arrived to restore control it did so at the end of its logistical rope, with inferior arms and unclear planning. They had also left along their marching route a decimated corps of *soldaderas* (women camp followers) whose presence as foragers, healers, and quartermasters may well have made a great difference (Salas 1990). In any event, it was a humbled and defeated army that returned to a once again diminished Mexico.

Taking advantage of the revealed weakness of the central governments, General José Urrea used his military garrison and seized the port city of Tampico in 1838–39. In the aftermath of Texas, his threat of secession was all too credible. For long months, politics interfered with any attempt to remove the caudillo, and his pronunciamiento played a role in the nation's inability to send an expedition to challenge beyond the Rio Grande (De Palo 1997: 70–72; Costeloe 1988).

Beyond Tampico, a sense among the military that internecine bloodshed could no longer be tolerated seems to have settled in during what has been called the decade of centralism (1836–1846). Constant strife among political parties and building frontier tensions precluded popular support for military pronunciamientos, and this relative harmony would be enforced by the subsequent U.S. invasion and occupation of 1846–48 (Santoni 1996). In the period after, nonetheless, the army would become increasingly divided over the issues of conservatives and liberals, between the proponents of Crown and Church and Army and those who believed that the army, subservient to the president, would alone suffice to control the majority indigenous populace. At the end of Santa Anna's dictatorship in 1853, the country boiled into full-scale civil warfare.

The army and militias of the nation would once again face each other over the barrels of their muskets. In the Wars of Reform (1857–61) the army itself had an issue at the centre of the conflict, the continuation or repeal of *fueros*, special military legal rights. Moreover, the shapes of the whole project of nationhood lay at stake—its understandings of citizenship, its priorities for economic development, the education of its people, and the role of its army in society (Sinkin 1979). After exhausting years of struggle, many of the innovations of law or policy had vanished into the haze of the 1850s warfare. President Ignacio Comonfort's rural military police (*Rurales*), new national bank, and adoption of the metric system, would all have to wait. Exhausted but poised for victory in 1861, the liberals seemed set to reform land laws, curtail the Church, and to limit the

military as an institution (Pani, this volume). Conservative leaders had little choice but surrender or appeal to Europe for aid in asserting their vision of Mexico—they found an expansion-minded French Emperor in Napoleon III and a spare Hapsburg, Maximilian of Austria.

The armies would not, even for a time, set aside their differences to fight against the French invaders. While many lent their support to the displaced President Juárez, even after his term expired and Jesús González Ortega became the rightful ruler, a number still sided with the French regime in the name of fueros (privileges), monarch, and God (Cadenhead 1972). The occupation and attendant civil warfare lasted five years, after which Juárez, a pariah to European monarchists, had reclaimed his nation on the principles of liberal and centralized politics. His foes among a spurned military swelled as he consolidated the fractured country (Hamnett 1996).

Little time would pass between the death of Juárez and the next wave of pronunciamientos. Porfirio Díaz was a young Oaxacan war hero from the battles of the French Intervention, and a man of ambition (Garner, this volume). Rising from the militia ranks of the National Guards, he would succeed in his coup d'états against the government on his second attempt with the Plan of Tuxtepec in 1876. His earlier uprising, the Plan of Noria, may have well succeeded in 1872 if had gathered as many supporters as he would later claim sycophantically to have fought for his cause. His revolt was also a reaction against the swift disbandment of the swollen army. Having reached over 70,000 men, the institution was stretched beyond effective control or reasonable budget. Yet Juárez and his successor Sebastián Lerdo de Tejada had, in Díaz's opinion, acted precipitously in their demobilizing cuts. Particularly when said cuts adversely affected the Oaxacans and other units loyal to the general, the army needed to be slowly and gently brought to a safe and cost efficient equilibrium (McNamara 2007). Once he gained power, nonetheless, the army of the long dictatorship of the Porfiriato (1876–1911) shrank away to a mere 28,000, its budget slid to a more reasonable 40–50 percent of the national revenue, and the National Guards, who propelled him to power, were systematically denuded of funds or disbanded.

Reporter Thomas Janvier from the U.S. spoke favourably and over-optimistically of Díaz's army, claiming that the time of revolutions was now finally over (Janvier 1889: 812–27). This was not even the case during the Porfiriato—pronunciamientos were quashed in 1877, 1878, 1879, 1886, 1890, and 1893 to name but the most serious (Cota Soto 1947: 87–90). Lesser barracks revolts continued to occur. Even so, Janvier was not mistaken. The era of the caudillos had slipped away, and the army was now, as he termed it, becoming the servant to the nation in most ways.

The greatest civil war loomed on the horizon, one as bloody as any in world history, in the Revolution (Knight 1986). The military that had fought amongst themselves for near a century had also been the instrument of oppression against Mexican people more generally, and it was these that now overthrew them. The army's violence against its own people defined the institution and nation in significant ways.

The Internal Enemy—Of Bandits, Unions, and Other "Savages"

As often as not, and sadly, the role of the army has been to suppress its own civilian populations. Given that the army was generally composed in its majority of conscripts taken from vulnerable and often indigenous populations, this most usually meant the application of industrialized firepower against their own people. The Indian in uniform

killed the Indian without, for the benefit of a Creole or mestizo class. Alternately, those groups of the margins, outside political bounds or paying taxes or religious conventions, were labelled bandits or savages by a government seeking excuses to attack them. This process was facilitated by the development of a paramilitary police, the Rurales, to control the countryside (Vanderwood 92). Of course, some truly were bandits, and some indigenous groups had little use for the central government, but the application of the term was one that had little objective limits. By the end of the nineteenth century, religious rebellion and labour unions could likewise be blamed on some degree of savagery, and treated accordingly. Armed groups outside of the military were simply and rhetorically recreated as the enemy, dehumanized, and eliminated.

Bandit gangs exemplified disorder. The activity of organized armed criminals, as defined by legal institutions, directly challenged the sovereignty of the early nation (Frazer 2006). Bandits captured the imaginations of foreign traders and embassies, of writers and artists. This deep cultural attachment combined with local resistance and rebellions to romanticize brigands and prolonged the ability of violent criminals to elude the law. As the *corridos* typically tell, it was inevitably a betrayal that poetically ended the tragic career of the famous bandit.

Throughout the nineteenth century a significant portion of the army was employed to persecute brigands and secure commerce from highwaymen. The army was also instrumental in stocking the forces of bandits—military deserters provided the manpower, intelligence, and arms that many bandit gangs relied upon. As but one example, a gang that terrorized the territory of Tepic in the 1888 was composed almost entirely by deserters from the 6th Regiment that had been sent to pacify the region (Neufeld 2009: 58). With new government-issued arms and mounts, and at least perfunctory training, recent deserters made even better bandits than did the thousands of unemployed soldiers left in the wake of the century's wars. Some have argued that the bandit also represented a challenge to the regime's claim of modernity, and hence justified the campaigns that eradicated the highwayman (Robinson 2009).

Battling brigands was difficult work. Bandits had superior local knowledge, support from nearby populations (even if at times coerced), and room to flee, which meant that regular armies did not easily succeed in eradication campaigns. Even the ill-repute of highwaymen acted against the army. Foreign credit suffered when even the road from Veracruz was under threat, and when funds were short the army had poor arms, little equipment, and shoddy training. When money began once more to flow, bandits in general went into rapid decline. The Restoration era (1867–76) saw progress, and the Porfirian forces who followed made good use of new technologies of rail and telegraph to assist them in extirpating the bandit threat, often through the application of *ley fuga* (execution of fleeing fugitives).

New technology was of little help to the army when it confronted the town of Tomochic in 1893 (Vanderwood 1998). A religious inspired uprising in a mestizo town far from railheads and on rough terrain, the rebellion should not have mattered in the large scope of things. The rebels did not seek national attention or power, they had not been predatory bandits, nor had they sought foreign support. In defending their town slightly better than the attacking federals who assaulted it, they poked a gaping hole in the vanity of a modernizing army. They thus became full-fledged rebels and bandits, and their crimes would multiply in the government's telling (Speckman, this volume). The soldiers who killed them remembered it differently, in corridos that valorized the defenders and in a memoir that blamed the whole bloody mess on greedy Mexico City politi-

cians in white gloves (Frías 2006 [1893]). Whether bandits or not, when the smoke cleared the government had earned yet more enemies.

They did not need additional foes; incessant warfare against various indigenous peoples had been a defining part of military life through the entire period. Persistently denying their subject status, a number of groups carried out all-out warfare and limited rebellions that shook the national polity. Among those who resisted, the Mayan Indians stood out.

Long exploited and shallowly colonized, the Yucatán of the nineteenth and early twentieth century generally had only tenuous connections with central Mexico (Rugeley, this volume). In terms of economic or transport ties, they lay much closer to the British in Belize or the Americans of New Orleans. Time and again the Maya rose against the oppressive local elite, most notably in the Caste War of 1845–8 and later in 1880–1902, and in the Revolution of 1910 (Rugeley 1996; Wells and Joseph 1997; Reed 1964).

Geography played an important role in these wars. The densely forested Yucatán peninsula was home to many populations unfriendly to outsiders, not just Mayan fighters but also the diseases of malaria and Yellow Fever which killed thousands of soldiers (Earle 2000). Moreover, the neighbouring British colony was certainly not above supplying armaments to the Maya, nor was the average merchant in New Orleans. The relative paucity of criollos and the resentment of Mayans also set the stage for punitive killings that bore all the hallmarks of racial massacres. The rebels were only finally overcome through compromise politics (as in 1848) or harsh counter-insurgent methods in 1901–3 (Drumond 1997). These latter, carried out in part by Victoriano Huerta, included hostage taking, burnt villages, torture of prisoners, and a comprehensive effort to carve the peninsula into manageable bites using new roads and railways. The divided and broken region of the Yucatán provided diminishing shelter for rebels, and the supply line to Belize had been severed where the new state of Quintana Roo was established. Less than a decade of tenuous peace would pass before the Maya joined the Revolution and fought again.

The southeastern frontier was not unique in its violence, an equally long history of indigenous warfare had made the northern frontier a feared place where Apaches, Navajos, and Comanche raiders roamed seemingly at will. The old colonial system of presidio fortifications was a porous sieve that had never done much more than regulate contact between settlers and pacified or allied tribes. The bellicose Indians, deemed savages or barbarians in Mexican press and public opinion, raided for supplies and wealth without cease until well into 1880s (Alonso 1995; Spicer 1962). They made exceptional use of mobility in warfare, of local knowledge of terrain, and adapted readily to better technologies of arms and to mounted operation. They also, like a number of bandit gangs, used the fiction of a fixed international border to shield their movements and provide havens from the vengeance of the army, whether U.S. or Mexican. The extent of Comanche depredations in the 1830s and 1840s greatly influenced the success of the U.S. invasion of northern Mexico in 1846 (Delay 2007).

Yet in the half century that followed, Apaches, Navajos, and Comanche alike faced defeat and eradication. Industrial production, new technologies, and successful diplomacy allowed the army to pursue and eradicate their "savages," and the Indian tribes themselves had begun to falter in terms of their population growth (due to pressures on land, diseases, and emigration). They faced an ever more numerous and settled frontier with better arms and coordination, and lost their final refuges in the murky border areas to now cooperating nations. The relatively few remaining were hunted, shunned, and

betrayed, their old menace faded—with the arrival of the Apache chief Victorio's head in a jar at the 1889 Parisian Exposition, the northern peril was likewise bottled and shelved (Tenorio Trillo 1996: 84).

An overlapping war, not far away, pitted Yaqui (and often Mayo) natives against various state and national governments through the century. The most numerous group encountered by the Spanish in the northwest, the Yaqui had first risen in arms in 1740 against the Crown (Hu-de Hart 1984). After Independence was achieved, they would continue to fight in almost every war of the century to assert independence with the aid of any ally; they took sides with centralists, federalists, and even with the French invaders, in the interest of gaining rights against colonization or taxation. The wars against the Yaquis intensified with the decline of Apache threats further north, and the army invaded and occupied their seven towns to prosecute a long set of wars from 1875–1886, with resurgences in 1890–1897, 1898–1901, and 1904–1907 (Troncoso 1905). International arms trade, as with Comanche or Maya, provided the Yaqui the means to continue, and the rugged sierras offered refuges that the army had difficulty in penetrating. As the campaign proceeded into the twentieth-century, army officers realized the futility of trying to separate guerrillas from civilians, and began to deport large numbers of Yaqui to henequen plantations in Mayan Yucatán (and profit thereby). Many prisoners of war were absorbed into federal army units, and deployed to different parts of the nation to fight other Indians, or bandits, or labourers. Like the campaigns of the southeast, the Yaqui region would eventually be partitioned and criss-crossed with roads, rails, and telegraphs, and thoroughly charted by military surveyors. Despite the army's efforts, and repeated reports that it had achieved victory, the fighting continued and the Yaqui made a significant contribution to the Mexican Revolution as part of the Sonoran contingents.

Facilitating the exploitation of indigenous groups, a long time mission for national armies, was the rural mirror to the always increasing use of soldiers to manage urban working classes. Often called to suppress urban unrest or quell rioting, as noted earlier in the Parián case of 1828, the armies and militias also played a significant role in stifling protest and breaking strikes as industrialization progressed. They were the last argument of kings, as the saying goes, and when labour troubles reached high intensity, the army could coerce calm at bayonet point. As an institution, the military also drained trouble-makers from their towns, villages, farms, and cities—recruitment by forcible conscriptions or even by unfair lotteries allowed a degree of social order to be reproduced when local elites selected men to disappear into the barracks (Serrano Ortega 1993). The army thus filled its ranks with the so-called dregs—thieves, murderers, bandits, cripples, and dissidents—of society. Such raw material created serious discipline issues for the military, and posed a challenge in trying to establish reliable and professional armies (Alexius 1976). By the time of the Revolution, naïve hopes that the military experience might actually prove reformative to the morally deficient or customarily backwards lower classes of the nation were largely abandoned. High rates of desertion remained endemic, and the barracks served largely to increase the conscript's repertoire of vices, rather than repair his defects (Neufeld 2009: 102–162; Campos-Costero 2006).

The use of the army to eradicate labour unrest reached its apogee in the early twentieth-century in Mexico as it had throughout much of the western hemisphere. The two cases of military intervention best remembered as precursors to the Revolution occurred at the Cananea mines in 1906 and at the Rio Blanca textile factory in 1907 (Anderson 1976). At Cananea the grievances of miners who were paid and promoted unfairly relative to their U.S. counterparts, led an unarmed strike that turned violent. Order was

restored with the arrival of Rurales (paramilitary police) and a contingent of "volunteer" Arizona Rangers, who hanged the workers' ringleaders (Smith 1970). Other malcontents were threatened with army service. The army acted decisively to contain the outbreak at Rio Blanco six months later (Koth 1993). There, troops fired point-blank into crowds of workers, killing at least 100, as they attempted to recover the bodies of their comrades slain earlier. Shooting recalcitrant labourers was not a novelty for the army, in truth, but with growing pressures of industrial change, economic crises, and international attentions, the gunfire at Rio Blanco presaged the arrival of a Revolution that would tear the nation apart.

The Enemies Without: Foreign Invasions

Until the Revolution, no civil wars or rebellions were as deeply scarring to the nation as the repeated invasions by foreign powers. Sometimes seen as mere hiccoughs in a military history so replete with civil wars and rebellions, the attacks by international armies left in their wakes different legacies and memories still little understood.

On the rumours that Mexico was ready to rise up against Creole leaders and return to the monarchical fold, an ill-informed and poorly prepared Spanish expedition landed at Tampico in 1829 (Sims 1982). Local armies did not greet them as liberators. A contingent from the south, under the vainglorious Santa Anna, arrived to invest the city along with existing forces. Poor sanitary conditions and supply plagued both sides, and the arrival of a hurricane prompted a battered Mexican army to hasten to attack. With little hope of relief to come, the Spanish officers surrendered their forces and Santa Anna proclaimed himself the saviour of the nation for the first time.

A decade later, French business owners whose shops had been damaged during the Parián riots and cuartelazo persuaded their government in 1838 to enforce the claims against a tottering Mexican government, still reeling from its loss of Texas in 1836. The Pastry War, as it became known, pitted a powerful French naval force against a decaying fortress at San Juan de Ulúa and a small land army around Vera Cruz (Robinson 1944; Maissen 1961; Beezley 2007; Hardin 2008). The French bombarded the city and held the customs house, until the government was forced to accept most of the terms of reparations the ultimatum required. In the end stages of the siege, a raid by French marines forced Santa Anna to flee over the rooftops to safety. As the foreigners withdrew to their ships, having accomplished their missions, the caudillo launched one last assault against his quietly departing enemy (De Palo 1997: 69). For his troubles he lost a leg to cannon-fire, never to flee across roofs again, but gained another legendary victory in defending the patria.

When President James Polk sent the U.S. army to the defence of Texans in 1846, provoked by loud Mexican politicians and his own expansionist ambitions, Santa Anna reappeared (Arnold, this volume). The northeast had been tenderized by a decade of punishing Comanche raiding and by the rebellion of José Urrea, and was in little shape to resist the advance of General Zachary Taylor. In the south, U.S. General Winfield Scott followed the invasion route of Cortés towards Mexico City (Vázquez 1997). His army, minus some Irish deserters, consistently outmanoeuvred the defenders, and made better use of artillery. The dramatic plummet of Sub-lieutenant Juan Barragán from the parapets of the doomed Chaputepec castle mirrored the tragic and devastating loss of half the national territory to the U.S. imposed Treaty of Guadalupe Hidalgo.

Perhaps Mexicans in 1848 would have felt justified in feeling that the worse was over, that their foreign troubles had ended at last. Yet on the heels of the 1858–1861 Reform War, they saw French sails again appear against the horizon at Vera Cruz (Pani, this volume). Intending to install Maximilian of Hapsburg at the behest of Mexican conservatives, the French army of Napoleon III marched the old trail; Cortés's route once again felt the steps of foreign invaders. Fully expecting that the weakened nation would fall easily to French arms, their total defeat at Puebla on May 5 (Cinco de Mayo) in 1862 came as a shock that galvanized Mexican resistance and embarrassed their vanquished European opponents (Sánchez Lamego et al. 1963). New armies set forth from France, bringing North African Zouaves and Foreign Legionnaires to fight alongside regular forces and bring Mexico to heel (Dabbs 1962). Guerrilla warfare followed French successes, and Benito Juárez led his government from exile—the army of Mexico now divided into *afrancesado* conservatives and the more numerous rebels who fought as raiders and bandits. After five years of occupation the Emperor was abandoned by his chief military support from the French. Maximilian briefly fought on against now-hardened rebels supplied with U.S. surplus arms, until he was captured and executed in 1867 alongside his Mexican generals.

While Europeans had now abandoned any ambitions towards Mexican conquest, the U.S. had not finished in its military interference with its neighbour. Threats of war between the countries had intensified in the 1870s and 1880s over cross-border banditry and the rules of pursuit. A degree of stability and a diplomatic solution was brokered, and an increased cooperation helped create some order along the frontier despite persistent tensions (Young 2004).

This new conviviality strained to breaking with the Mexican Revolution. President Woodrow Wilson's distaste for President Victoriano Huerta led to a U.S. naval blockade and incursion, once again focused on poor abused Vera Cruz in 1914 (Meyer 1972; Quirk 1967). The raid by Pancho Villa against a New Mexican town instigated a large scale punitive invasion of northern Mexico by General John Pershing in 1916. This ultimately failed to find Villa but did undermine some of his support in parts of Chihuahua (Katz 1998). The contexts of the Revolution, and the roles of the military in it, are the final subjects in this historical trajectory.

The Revolution

The Revolution, during the armed phases of the 1910s, represented warfare on a scale the nation had never known (Buchenau, this volume). Porfirian armies, despite a rhetorical prowess and apparent modernization, succumbed relatively quickly to a multiple location revolt of peasants, workers, Indians, and urban insurgents. Counter-revolutions and civil warfare then prolonged the bloodshed for most of a decade.

At the eve of Revolution, the federal military had indeed achieved considerable reformation as an institution from a century earlier. The Military College, tentatively begun in the 1820s, had achieved international recognition for its education and curriculum (Chavarri 1960). The reorganized General Staff had likewise become much improved from the 1824 inception, as had the reordered Medical Corps and Navy. Advances in technology, from gunships to artillery design to rail transport, marked the entrance of the armed forces into a new era in the twentieth century. Federal officers like Ignacio Altimirano, Heriberto Frías, and Manuel Payno became renowned literary

figures, much as the military experiences of Proust and Dostoevsky in the nineteenth century had shaped their works in Europe. The army's engineers likewise left their marks, with comprehensive cartography and civil engineering (Craib 2004).

Yet despite advances and despite relative success against bandits and rebels, the army had only increased its brutal reputation. Adding to its ill repute in suppressing labour unrest, the over-enthusiastic application of ley fuga had earned the military a bloodthirsty black legend. The continued use of conscription and perceived moral turpitude of soldiers made army service a punishment and a burden. Throughout, troops' actions contributed to growing civilian distrust, fear, and hatred.

Francisco Madero's revolutionary program in 1910 had the military high in its agenda. In opposition to General Díaz and General Bernardo Reyes (who was on military commission in Europe), Madero appealed to the patriotism of federal garrisons and promised to redress their chief grievances of payments and comforts. Many former soldiers of the *leva* rallied to his cause, and many men deserted from the federals to join him. While popular bellicosity and spontaneous uprisings played their role, much of the Revolution's successes stemmed from the Porfirian army and its training.

The Revolutionaries ranks were filled with Díaz's former soldiery, including exceptional officers such as Felipe Angeles and Francisco Luis Urquizo, the half-trained middle-class men of the disbanded Second Reserve, and the tens of thousands of men who had escaped from conscripted service as deserters (Gilly 2007; Urquizo 1920; Bryan 1971). To these the Revolution added many who had suffered from Díaz's army and police: the families of men vanished into army service, the victims of draconian policies, the many natives deported or vanquished. The army trained and motivated its foe, and armed them too, with weapons taken from federal armouries. Where Independence took eleven years, the broad support for Revolution saw the Porfirian elite overthrown in a matter of months.

Madero's Revolution did not please all, and a military faction soon conspired against the new government. General Victoriano Huerta seized the government through a military coup d'état in 1913, after a bloody ten days of fighting in the streets of the capital called the *Decena Trágica* (Urquizo 1971). The Revolution forestalled by reactionary generals, the battles now returned to the rural theatres.

United by the need to defeat Huerta, the remaining forces of the revolution, aided by a friendly U.S. government, converged on Mexico City in the course of two more years of war. In the north, a new faction had emerged under the leadership of Venustiano Carranza and Alvaro Obregón, the latter considered by many to be the finest general of his time (Hall 1981). Pancho Villa and Emiliano Zapata led their armies to successive victories on the road to the capital, and once there, enjoyed the comforts of their national palace (Brunk 1995; Katz 1998). With Huerta gone, the following years of revolutionary violence sought to install his replacement.

From 1914–1917, Carranza consolidated his hold over the nation and brought his former allies to heel. His forces under Obregón's leadership put constant pressures against Villa to the north, and a betrayal allowed for Zapata's assassination to the south. Villa, a proponent of the cavalry charge, learned what Europeans had been learning since 1914, that machine guns and barbed wire trumped horse and sabre (Klingeman 2008; Sánchez Lamego 1983). With the *villistas* thus beaten at the Battle of Celaya in 1915, the national government had the time and room to unify Mexicans and try to establish a new Constitution.

Conclusions

The militaries of the first century, for good or ill, changed the course of Mexican history. Frequently, their actions as the elite, or for the elite, pitted them against the interests of ordinary civilians. At the same time, they claimed to embody nationalism whether as federal armies or regional militias. The disconnect between ideals and reality required resolution in the new Revolutionary nation after 1917.

For the federal military, reforms of the 1920s, many identical to those attempted before 1910, would rebuild an army with rhetorical distance from that of the hated Porfiriato (Torres 1924). While the leva would continue, and soldaderas would appear in some units until the 1930s, the military confidently argued that it was a new creature—this despite its retention of many Porfirian era officers (Rath 2009). From the political standpoint, the army would also continue, until 1946, to provide the presidents who led Mexico into the future.

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Two Centuries of Independence: The Revolutionary Century

The Sonoran Dynasty and the Reconstruction of the Mexican State

JÜRGEN BUCHENAU

Sonoran troops under the command of General Alvaro Obregón first arrived in Mexico City in August 1914, days after the dictator Victoriano Huerta had resigned and embarked on his exile in Europe. From that day until June 1935, the leaders known as *los sonorenses*, or the Sonoran Dynasty, played a pivotal role in Mexican history. They shaped the Revolution almost as much as a group of from Oaxaca, most notably Benito Juárez and Porfirio Díaz, shaped the era of Liberal modernization in the second half of the nineteenth century. In 1915, Obregón's forces played the leading role in the victory of the Constitutionalists under the nominal control of Venustiano Carranza over the Conventionists of Pancho Villa and Emiliano Zapata. Obregón's allies also figured prominently in the writing of the 1917 Constitution and in the national government of President Carranza and, in April 1920, Sonoran leaders waged a successful coup d'état against Carranza that resulted in a succession of governments dominated by men from that state. Over the next fourteen years, the Sonorans steered the process of national reconstruction, mixing a desire to fulfill promises of the revolutionary constitution with a commitment to economic development and political centralization. They achieved these aims by mixing cooptation and repression of popular movements as well as regional strongmen. Over time, this political system primarily carried out by its military figures took on institutional and civilian characteristics.

Between 1920 and 1934, four out of six presidents—Adolfo de la Huerta, Obregón, Plutarco Elías Calles, and Abelardo L. Rodríguez—hailed from Sonora and served a total of eleven years in office. This is remarkable given that during the other 173 years of Mexican history only one other Sonoran (Félix Zuloaga Trillo) has served at the head of the national state, and Zuloaga, imposed by the Conservative faction during the War of Reform of 1858–1861, only held office for thirteen months as a disputed president. Even more importantly, in 1929, Calles and his allies created a ruling party, the Partido Nacional Revolucionario (PNR, or National Revolutionary Party) following the death of Obregón. The PNR and its successors (including the present-day PRI) remained in

office until the year 2000 and the party continues to bear characteristics of its Sonoran founders—not surprisingly, a statue of Calles stands before PRI headquarters still today.

In a field that has favored the study of popular movements—so often, the "losers" in Mexican history—over that of the victorious elites, historians have not expressed much interest in the Sonorenses. While Villismo and Zapatismo, in particular, have elicited a plethora of scholarship both in Mexico and abroad, studies of the Sonorans remain few and far between. Yet an understanding of the Sonoran alliance, and particularly its political and economic dynamics, remains crucial for an evaluation of the reconstruction of the national government during the 1920s and early 1930s.

An understanding of the Sonoran Dynasty must begin with an appreciation of its principal members. The Sonoran protagonists include the above-mentioned four presidents as well as seven other important figures in the revolution. An evaluation of these personalities reveals the diversity of backgrounds and political motives among the Sonorenses and defies the sweeping historical generalizations about the Sonorans discussed at the end of this chapter.

The Sonoran Presidents

Adolfo de la Huerta Marcor, an artistic and intelligent man from Guaymas, was one of only two presidents in the period 1917–1946 who did not serve in battle and did not have a military rank (Emilio Portes Gil is the other). De la Huerta grew up as one of the few Sonorans with a high school education—a level that he could only achieve by studying at the Escuela Nacional Preparatoria in Mexico City. This school was a breeding ground for national political connections. De la Huerta joined Madero's revolution at its outset and, in 1911, won election to the Sonoran state congress. During the Constitutionalist period he served in various positions, including as the senior official of the Secretaría de Gobernación, Governor of Sonora (twice), as a federal senator, and consul general in New York City. As Governor of Sonora, he was the formal head of the rebellion against Carranza announced in the Plan of Agua Prieta on April 23, 1920.

Following Carranza's defeat and death, congress appointed de la Huerta as substitute president on June 1, 1920, and he served in that position until November 30, 1920. The highlight of his brief tenure was his successful effort at reconciliation with the Sonorans' political enemies, including Pancho Villa. Under President Obregón, de la Huerta served as Treasury Secretary in the hopes of running for the presidency in 1924. Obregón expressed a preference for Calles as his successor, and de la Huerta revolted against the federal government in December 1923. The ensuing so-called de la Huerta Rebellion pitted a majority of army officers against the Obregón regime. Thanks in part to the disunity of his opponents (Plasencia 1998), Obregón prevailed, sending de la Huerta into exile in Los Angeles, where he remained until 1935. Historian Pedro Castro has written two books on de la Huerta, the only major works on this important figure aside from an autobiography assembled by one of de la Huerta's friends (Guzmán 1957; Castro 1992; Castro 1998).

By far the best known among the Sonorenses, Alvaro Obregón Salido (1880–1928) hailed from the small town of Huatabampo in the fertile Mayo Valley in the south of the state. Although his mother descended from one of Sonora's wealthiest families, Obregón grew up poor. After experimenting with various careers, he acquired a successful small agri-business in the latter years of the Porfiriato. He did not participate in Madero's revolution but was elected mayor of Huatabampo following the triumph of the rebels. He

joined the fighting in 1912, when Governor José María Maytorena asked all local politicians to assemble impromptu military forces in order to defend the state from the incursions of the followers of Pascual Orozco, and rapidly gained a reputation as the finest strategic mind among the Sonoran military leaders.

Following Madero's assassination in February 1913, Obregón led the Constitutionalist war effort in his state against the dictatorship of Victoriano Huerta and, in July 1914, his forces entered Mexico City ahead of those of Generals Pancho Villa and Pablo González. When the Constitutionalists coalition fell apart soon after, Obregón sided with González and First Chief Venustiano Carranza against Villa's powerful División del Norte, the largest army that Mexico had ever seen. Allied with Morelos campesino leader Emiliano Zapata, Villa appeared to hold all the advantages in the fight with Obregón and his allies, but in the summer of 1915 Obregón's troops decisively defeated the Villistas near Celaya and León, Guanajuato. As the primary victorious general in the Revolution, Obregón aspired to the presidency, and when President Carranza blocked those aspirations, the Sonorans took power by force (Obregón 1959).

Elected during de la Huerta's interim presidency, Obregón served from 1920 to 1924. His tenure marked the gradual restoration of central authority over the countryside, the establishment of the Secretariat of Public Education, the official sponsorship of revolutionary art, and the reestablishment of diplomatic relations with the United States. Yet historians also remember Obregón for his role in the 1923 assassination of Pancho Villa and his decision to impose Plutarco Elías Calles as his successor—a decision that contributed to the outbreak of the de la Huerta rebellion. During Calles term, he returned to civilian life in Sonora to continue building his business empire in that state, an effort that ran into trouble when Obregón overextended himself in his investment. He retained considerable political influence through his allies in the army, congress, and Calles's cabinet—influence that he used, at first, to help his business position in Sonora, and then to have himself elected to another term as president. In 1926, his allies in congress pushed through a constitutional amendment that allowed Obregón to stand for election. Predictably, he encountered ferocious opposition from those committed to the venerated revolutionary principle of no reelection. This opposition coalesced behind two of his Sonoran comrades-in-arms, Generals Francisco R. Serrano and Arnulfo Gómez. In the fall of 1927, both generals and their followers were assassinated on Calles and Obregón's order, under the pretense that they were planning a coup d'état. Without strong opposition, Obregón won election to a second term as president. On July 17, 1928, just two weeks after this election, a Catholic fanatic assassinated him during a luncheon held in his honor.

Despite his significance, Obregón has inspired few scholarly studies until recently. In 1981, Linda Hall published what still remains as the standard work on his career in the 1910s (Hall 1981), and this author has an Obregón biography in press (Buchenau in press). The main interpretative difference between these two studies is that the former portrays Obregón as a conciliator, while this author paints him as a caudillo who continued to represent militarism in Mexico. Another biography of Obregón, by Pedro Castro, is also forthcoming. An influential study claims that Obregón's political successes may be explained by his fascination with death, which included an indifferent attitude toward the possibility of his own passing (Krauze 1997, 374–403).

If Obregón can be thus considered the caudillo of the Sonoran alliance, Plutarco Elías Calles (1877–1945) represented its administrative center. Like Obregón, Calles was descended from a notable family fallen upon hard times. He spent twenty years dabbling

in various careers as a teacher, hotel manager, mill operator, and farmer. Although Calles, like Obregón, did not number among Madero's erstwhile supporters in Sonora, the revolution gave him his moment of opportunity, as his friend and fellow Guaymas native de la Huerta recommended him for the post of police chief (*comisario*) of the border town of Agua Prieta. As *comisario*, Calles became involved in fighting the Orozquista rebels in 1912, and a year later, he joined de la Huerta and Obregón in opposing Victoriano Huerta's coup d'état against Madero. Calles served as a capable border agent for the Constitutionalists but also had moments of military triumph, such as his role in outlasting the Conventionist siege of Naco in early 1915. In August 1915, Carranza named him military governor of Sonora, and Calles used that position to promulgate a radical reform program that, in many ways, anticipated many of the provisions of the 1917 Constitution. In 1919, he served in Carranza's national cabinet before resigning this position to help Obregón in his challenge to Carranza the following year. He then served as Minister of War under de la Huerta, and as Secretary of Gobernación under Obregón.

Calles was one of the most important architects of the new Mexican government and nation. As president from 1924 to 1928, he embarked on an ambitious reform program, modernized the financial system, and defended national sovereignty against an interventionist U.S. government. Yet these reforms failed to eradicate underdevelopment, corruption, and social injustice. Moreover, his unyielding campaigns against the Catholic Church and his political enemies earned him the reputation of a repressive strongman. After Obregón's assassination, Calles's adroit political maneuvering helped save his country from renewed civil war. As *jefe máximo*, he continued to extend broad influence as the foremost political figure of his country, while three presidents succeeded each other in an atmosphere of constant political crisis. He played a significant role in founding a ruling party that reined in the destructive ambitions of leading army officers and promised to help campesinos and workers attain better living conditions. This party and its successors remained in power until 2000, and today's Partido Revolucionario Institucional (PRI, or Party of the Institutional Revolution) still celebrates Calles as its principal founding father.

Like Obregón, Calles inspired few biographies. This author's *Plutarco Elías Calles and the Mexican Revolution* stands as the only scholarly analysis of his entire career, and Carlos Macías has published a detailed, though extremely favorable, biography that covers the years through 1919 (Macías 1995). Two shorter works seek to explain Calles's authoritarian personality as well as his trouble with the church by a psychoanalytical interpretation that stresses his birth out of wedlock and the absence of his mother (Monteón 2004, 43–61; Krauze 1997, 404–7).

Contemporary views of Calles suffer from obvious partisanship. Only one of Calles's contemporaries managed to pen a nuanced interpretation of the *jefe máximo* (Puente 1933). Among other portrayals, there are polemical works (Caro 1924; Vasconcelos 1938 and 1939) as well as sycophantic treatments (Bórquez 1925; Cháverri Matamoros and Valenzuela 1929). One U.S. resident of Mexico who witnessed Calles's influence, historian Ernest Gruening, wrote a favorable assessment (Gruening 1928). Another, historian Frank Tannenbaum, depicted the Calles era as "debased and clouded years" and blamed the political leadership for their pursuit of "self and power" (Tannenbaum 1950, 69–70).

Tannenbaum's assessment continues to influence North American scholarship about the Sonoran Dynasty generally and the Calles years specifically. For example, one historian has claimed, with some exaggeration, that Calles was "hated far and wide" (Wasserman 2008, 266).

In fact, Wasserman's assertion that Calles was widely hated in Mexico points to the teleological nature of Tannenbaum's argument. U.S. historians have judged Calles's political career mainly from its end—the Maximato, a time of worldwide economic depression and anxiety in which Calles became increasingly authoritarian and conservative. In terms of his historical assessment, Calles therefore had the bad luck of surviving; long after the great icons of the revolution had all been assassinated. Despite the danger inherent in making counter-factual arguments, it is probably safe to say that if José de León Toral's bullets had felled Calles rather than Obregón on July 17, 1928, it would have been Obregón—and not Calles—who would be reviled by posterity for his authoritarian methods. With the exception of Benito Juárez and Lázaro Cárdenas, the nation's great political icons all have died violent deaths, while most of the villains died peacefully from natural causes. Mexican scholarship remains more nuanced on Calles's legacy, stressing the importance of his nation-building project while blasting him for his anticlericalism and repressive methods (Córdova 1995; Medín 1982; Meyer et al., 1977; Meyer 1978; Meyer et al. 1978).

Historians know least about the fourth and final Sonoran president, General Abelardo L. Rodríguez Luján, the subject of only two historical studies. Born in 1891, Rodríguez was more than ten years younger than de la Huerta, Obregón, and Calles. He served as a minor military officer in the early years of the revolution. In July 1920, Obregón commissioned him to Baja California to remove from power a local strongman and, following the success of this operation, Rodríguez henceforth dedicated himself to building up a political and economic power base in that border state. In partnership with investors from southern California, he used his position as military governor to establish casinos, vineyards, fisheries, and other enterprises in the Tijuana region, and rose to great wealth by 1932, when *jefe máximo* Calles tabbed him to serve as interim president (Rodríguez 1962). Rodríguez has often been overlooked as one of the supposed *pelele*, or puppet presidents who served under the *jefe máximo*. On the contrary, recent research has shown that Calles's power dimmed during the presidency of Rodríguez, who can therefore be considered a bridge figure between the Maximato and the presidency of Lázaro Cárdenas. In addition, Rodríguez played a crucial role in the Sonoran coalition even prior to his presidency by helping bankroll government efforts to defeat the de la Huerta rebellion in 1923 and the Escobar rebellion of 1929. He also served as an unofficial nexus in business dealings involving both Calles and Obregón, which illustrates the fact that the Sonoran Dynasty existed as both a business network and a political alliance (Gómez Estrada 2002; Buchenau 2009).

The Other Sonoran Leaders

The secondary members of the Sonoran coalition—those who never rose to the rank of president—also played an important role in the rise and rule of the faction. These secondary members included two middle-class leaders: José María Maytorena and Benjamín G. Hill; a troika of leaders who witnessed the brutal suppression of the 1906 mining strike in Cananea (Manuel Diéguez, Salvador Alvarado, and Juan Cabral); and two generals who rose on Obregóns' and Calles's coattails: Francisco R. Serrano and Arnulfo Gómez. At one point or another, six of these seven leaders ran afoul of the two Sonoran patriarchs, Obregón and Calles, in a clash that doomed their political careers. The only exception, Benjamín Hill, died in 1920 under mysterious circumstances that hint at foul play by at least one, if not both of the patriarchs.

The first important leader among these was José María Maytorena, the original Sonoran insurgent during the era of Porfirio Díaz. Maytorena was a middle-aged landowner from a family that figured among the state's foremost opposition clans during the Porfiriato. This family would have been wealthy enough to buy the governorship if they had not been don Porfirio's opponents. Maytorena was primarily interested in political change and reiterated Madero's demands for democracy at both the national and the local level. Yet the narrowly political nature of Maytorena's platform explains the fact that he became the figure around whom other aspiring leaders rallied. In October 1911, he was elected governor of Sonora. In that capacity, he steered the defense of the state against the Orozco rebellion the following year. After Huerta's coup against Madero, Maytorena could not decide whether or not to oppose the new federal authorities and departed to exile in Tucson, Arizona. When he returned to his position in August 1913, many Sonoran leaders had turned against him and, within a year, the Sonoran revolutionary leadership had split into pro- and anti-Maytorena factions. These factions coalesced with the two large national factions of the moment: Maytorena and his allies joined the Conventionists, and de la Huerta, Obregón, and Calles, the Constitutionalists. Obregón's triumph over Villa in June 1915 doomed the Conventionists, who made their last stand during their November 1, 1915 attack on Agua Prieta, an attack that resulted in the complete triumph of Calles's Constitutionalist forces. Calles's victory once again sent Maytorena into exile in the United States, from which he did not return during the reign of the Sonoran dynasty. A recent biography (Alarcón 2008) traces Maytorena's career and provides an interesting comparison to that of Maderista governor Abrahám González of Chihuahua (Beezley 1973); and three scholarly articles provide detailed accounts of his political role during the revolution (Deeds 1976; Henderson 2001).

Almost forgotten by most historians, due to his untimely death in 1920, General Benjamín G. Hill played a crucial role in the revolution as well. A native of Sinaloa, Hill was the grandson of a doctor in the Confederate army and Obregón's cousin. He moved to Sonora at the age of seven and later settled as a farmer near Navojoa, where he was a minor office holder as a local *regidor*, or councilman. He married a European countess and became involved with the Maderista opposition, which earned him imprisonment in the state capital of Hermosillo. During the decade of fighting, Hill played a crucial role as one of the principal generals in the Sonoran theater. While Obregón was pursuing his enemies elsewhere in Mexico, his cousin served as his primary aide in Sonora. Carranza named Hill military governor of the state in August 1914. In that capacity, Hill joined Calles in orchestrating the defense of Naco against Maytorena's army.

Following the Constitutionalist victory, Hill devoted his time to organizing the Partido Liberal Constitucionalista (PLC, or Liberal Constitutionalist Party). Beginning in 1919, the PLC sought to orchestrate Obregón's election to the presidency. In the process, Hill consistently pushed the caudillo to recognize the legitimacy of a constitutional and democratic political process in which Congress would play an important role under an Obregón presidency. Obregón, and particularly Calles, resisted Hill's plans, and Carranza's opposition to Obregón's election made the issue moot, leading to a military solution—the Plan of Agua Prieta—that strengthened the role of the military at the expense of congress and the PLC.

After the Sonorans triumphed over the federal government in May 1920, Hill served as military commander of the Valley of Mexico before being named Obregón's Secretary of War on December 1, 1920. Before he could assume his new duties, Hill fell sick

immediately following a banquet given in his honor, and died two weeks later. Since it appeared unfathomable that Obregón would poison his own cousin, rumors blamed Calles for what some called the "feast of the Borgias" (Dulles 1961, 110, 377). Nonetheless, the circumstances surrounding Hill's death have never been illuminated; it is at least possible that Obregón feared his political network, especially among civilians. Whatever the case, this earliest casualty among the Sonoran revolutionaries deserves a serious study, especially as regards his role in the Sonoran ascendance under Carranza.

In contrast to Maytorena and Hill, both of whom hailed from prosperous backgrounds, yet another group of the revolution in Sonora included a set of characters from the lower middle class influenced by the 1906 strike in the northeastern mining town of Cananea. Bloodily repressed by the *rurales* and police with help from the Arizona Rangers, this strike marked a signal event in the dissolution of the Porfiriato. Anarchist and socialist ideas influenced these miners, most of whom hailed from other areas of Mexico and had only recently arrived in Sonora. The miners made personal experience with racial discrimination, as the North Americans with whom they worked received a multiple of their wages for the same work.

One of these miners, the Jalisco native Manuel M. Diéguez, helped organize the Cananea strike and was sentenced to fifteen years of prison. Freed by the revolutionaries, he served as mayor of Cananea until Huerta's coup d'état once again set him at odds with the government. Like Calles and Hill, Diéguez organized one of the first impromptu military forces against the dictator Huerta. He accompanied Obregón in his southward push toward Mexico City and became governor of Jalisco in June 1914. Briefly displaced by the Conventionists, he returned to the governorship after Obregón's triumph.

Reforms and anticlericalism marked Diéguez's tenure as governor of Jalisco, just as they characterized Calles's rule in Sonora. The governor issued decrees that reflected his working-class background. Diéguez took the demands of workers seriously, and to a greater degree than the other Sonorans. For example, one decree fixed a nine-hour workday and Sundays as an obligatory day of rest, and another established a minimum wage. Anticlericalism played a far greater role in deeply Catholic Jalisco than in Sonora, which had no more than thirty ordained priests at that time. Unlike Calles, who operated against the church from a position of political strength, Diéguez pursued his anticlericalism in order to augment the authority of the civic government and to control the political sphere. Hence, his most notable action as governor was the expulsion of the archbishop of Guadalajara. Under his aegis, mobs defaced religious symbols as state police looked on, and state authorities suppressed religious holidays and forbade confessionals. Nevertheless, Diéguez did not order the execution of a single priest (Curley 2009).

After his tenure as Governor of Jalisco, Diéguez's path ran contrary to that of the Sonoran patriarchs. In April 1920, Diéguez sided with Carranza against his former Sonoran comrades-in-arms and, despite a rapprochement with de la Huerta, he elected for exile in the United States. Less than three years later, he joined the de la Huerta rebellion. In April 1924, after Obregón and his allies had crushed this rebellion, Diéguez was executed by firing squad. One biography traces Diéguez's career in the Mexican Revolution (Aldana Rendón 2006).

Like Diéguez, Salvador Alvarado had also experienced the Cananea strike firsthand, albeit as a shopkeeper. A native of Sinaloa, he moved to Sonora at the age of seven. He became a pharmacist's assistant, an avid reader, and, just prior to the strike, a member of the anarchosyndicalist Partido Liberal Mexicano. In late 1910, he spearheaded an assault on the headquarters of the federal army in the state capital of Hermosillo—one of the

first revolutionary acts in the state. In the war against Huerta, Alvarado assumed control over the Constitutionalist forces in southern Sonora and built a power base independent of that of the other major power brokers in the state. In February, 1915, Carranza appointed Alvarado governor of the distant, southeastern state of Yucatán, and sent a military expedition force with him. In a state still governed by its Porfirian oligarchy that produced millions of dollars in revenue through henequen exports, the local population interpreted the arrival of Alvarado and his 7,000 troops as an invasion (Joseph 1982).

Like Calles and Diéguez, Alvarado thus gained his first significant political experience as a military state governor. Like his colleagues, he distinguished himself by his reforms; unlike them, he was an outsider who ruled over a heavily indigenous state that he regarded as politically and socially backward, especially as regarded the henequen-owning oligarchy. Alvarado was more interested than his colleagues in integrating into the nation the state over which he ruled; and more focused on agrarian matters. Aside from reforms that resembled those of his Sonoran colleagues, he abolished debt peonage, an institution that hardly existed in Sonora; he launched a land redistribution campaign; and he devoted himself to improving the situation of women, whom he considered as living in conditions of virtual slavery. His views on land distribution resembled those of his Sonoran colleagues in fostering a class of smallholders rather than collectivist farming as practiced by the Maya peasants. Once he had understood the state's dependence on henequen production after two years in office, Alvarado scaled back his reforms (Alvarado 1965; Joseph 1988, 1–10).

Alvarado fell out with Obregón in the beginning of his presidential term, primarily because the caudillo did not offer him a position in his administration. Like Diéguez, he joined the de la Huerta rebellion in late 1923 and led the rebels into the decisive battle against Obregón at Ocotlán, Jalisco, in February 1924. After the caudillo won what he later called his hardest-won victory, Alvarado went into exile in the United States, only to return a month later to resume battle in southern Mexico. On June 10, 1924, a subordinate loyal to Obregón betrayed and murdered him.

Few studies of Alvarado's career exist. There is one highly favorable study focusing on his tenure as governor of Yucatán (Orosa Díaz 1980) as well as a book chapter on his relationship with Yucatán's Women's Leagues as governor (Smith 2009). Under a pseudonym, Yucatecan poet Antonio Médiz Bolio provided a hagiographic portrayal shortly after Alvarado's death, reprinted in 1985 (Médiz Bolio 1985).

Finally, strike participant Juan Cabral also numbered among the original Maderista military leaders from Sonora. The son of a Portuguese immigrant, he will not get a lengthy introduction here because he left the ranks of the revolutionaries during the war between the factions (1914–1915) and never held an important political position. Nevertheless, he distinguished himself as one of the few Sonoran revolutionaries to push consistently for land reform as a solution for his state's and his nation's social problems, and he was the first political mentor to eventual president Lázaro Cárdenas del Río, under whom the government expropriated and redistributed 49 million acres of land.

The last group among the secondary members of the Sonoran coalition was a pair of generals who desired to supplant Obregón and Calles after their respective presidencies: Francisco R. Serrano and Arnulfo Gómez. Both of these military leaders were the respective protégés of their Sonoran patriarchs. Born in Sinaloa, Serrano moved to Huatabampo, where he established himself as a farmer and friend of Obregón. He had marched with Obregón from the beginning, accompanying him on his first military campaign against

Orozco in 1912. Over the next few years, he became Obregón's most trusted aide and served in a variety of positions, including military commander of Sonora, and, most importantly, the caudillo's Secretary of War between 1922 and 1924. As Secretary, he not only orchestrated the government response to the de la Huerta rebellion, but also gained infamy for his drinking and womanizing.

In part because of these transgressions, Obregón felt free to renege on a reported gentleman's understanding that he would support Serrano as Calles's successor in 1928. When Obregón announced his intention to run for another term, Serrano founded an opposition party and declared his own candidacy, joined by that of Gómez, who had risen to political and military influence on the heels of Calles. Curiously, Serrano and Gómez all but ran a joint campaign, yet each insisted on his own presidential candidacy. Although Obregón made fun of the two-headed team that opposed him, he knew that opposition to his second presidential bid ran deep and sought to derail his opponents.

On October 3, 1927—and on the orders of Calles and Obregón—General Claudio Fox and his men gunned down Serrano and his supporters on the highway from Cuernavaca to Mexico City. One month later, federal forces executed Gómez in a cave in the state of Veracruz. These killings were significant in that they illustrated the fact that the Sonoran Dynasty knew no friendship, but only political expediency. After Obregón's assassination in 1928, only five of the eleven aforementioned Sonorans remained alive, and two of them—childhood friends Calles and de la Huerta—remained forever estranged from one another. While the story of the Sonoran coalition and its disintegration remains to be told, there is a recent biography on Serrano (Castro 2005). For his part, Gómez (probably the more politically gifted of the two generals) still awaits a serious study.

The Sonorans in Historiography

Historians still await the publication of a definitive study of the Sonorans as a group. With good reason, scholars have found much to criticize in a group whose members used military force and repression. From a historical perspective, the populist presidency of Lázaro Cárdenas looms large over the Sonorans and obscures their legacy. In only six years, Cárdenas redistributed more land and nationalized more property than all of the Sonoran-led regimes combined. Perhaps even more importantly, Tata Lázaro instilled in ordinary Mexicans the sense that he cared about them, thus setting off a wave of popular mobilization that reshaped the emerging political system and, in particular, the ruling party, which he renamed Partido de la Revolución Mexicana (PRM, or Party of the Mexican Revolution). Even though Cárdenas put this popular genie back into the bottle during his last years in office, it has been difficult for scholars to recognize that the Sonoran period laid the foundation for Cardenista reforms (Córdova 1995). For example, historian Adrian Bantjes claimed that "it was not until the 1930s … that revolutionary change came to Sonora" even though both Calles and de la Huerta numbered among the most radical governors of their era (Bantjes 1998, 3).

Almost fifty years ago, the historian John W.F. Dulles wrote the first synthesis of the Sonorans, a book that still remains the only one of its kind. To this day, his work *Yesterday in Mexico* remains an important scholarly contribution for its clear and minute recounting of political history between 1920 and 1935—sometimes so detailed that the book almost appears like a day-to-day chronicle of the Sonoran years. Another strength of Dulles's work is the fact that the author gave significant attention to congress, the press,

and public opinion, sectors often dismissed in analyses of a political system focused on the president and his cabinet. As was the case in Dulles's age, the author insisted that the facts speak for themselves rather than shoehorning them to fit an overarching theory.

As is usually the case with such empiricist enterprises, *Yesterday in Mexico* implicitly presents an interpretation in the form of a Hobbesian view of the Sonoran era. Indeed, Dulles's Mexico is a chaotic world in which selfish generals and civilian politicians jockey for power, and in which political centralization happens by murder, exile, and other forms of elimination. Thus Obregón and Calles appear in the work as the ultimate alpha males who withstood all challenges to their power until the former's assassination, after which Calles operated as the power behind the scenes as *jefe máximo* (Dulles 1961).

The most influential scholarly interpretation of the Sonorenses is the work of Héctor Aguilar Camín. Aguilar Camín belonged to a group of revisionist historians in the 1970s whoreinterpreted the 1920s and 1930s as an efficient reprise of Porfirian modernization and centralization. He constructed what one might consider the "Black Legend" of the Sonorenses, portraying them as brutal strangers who conquered a nation to which they remained alien. In Aguilar Camín's view, the Sonorans were anticlerical and creole frontiersmen who overwhelmed a Catholic, indigenous, and mestizo Old Mexico. Hardened in their wars against the Apaches and Yaquis, these frontiersmen built a frightfully effective war machine. Aguilar Camín posits the Sonorenses as modernizing agricultural entrepreneurs imbued with the Protestant and capitalist work ethic of their neighbors in the United States (Aguilar Camín 1977 and 1980).

A decade later, Ramón Ruiz struck a similar tone in his book, *The People of Sonora and Yankee Capitalists*. Ruiz uses a dependency analysis to depict the Sonoran revolutionaries as *comprador* allies of North American business interests. Although Ruiz's study focuses on the Porfiriato, it forecasts the revolution in the form of short analyses of some of the future revolutionaries as young men eager to piggyback on the march of U.S. capitalism in the early 1900s (Ruiz 1988).

Aguilar Camín's views continue to resonate in historiography. As recently as 2006, Mary Kay Vaughan and Stephen E. Lewis proclaimed in their introduction to the edited volume *The Eagle and the Virgin*: "Anglophiles hoping to pragmatize Mexican culture along the lines of that of the United States, [the Sonorans] regarded central and southern Mexico as the sick and lethargic consequence of Spanish oppression and Catholic obscurantism" (Vaughan and Lewis 2006, 11).

In fact, even though de la Huerta, Obregón, Calles, and Rodríguez cultivated close business ties with U.S. investors—and even though all of them displayed an abiding faith in capitalism—only Rodríguez was a genuine Anglophile. Not only did Rodríguez marry a North American as his second wife (a woman who left him after accompanying him into the field and witnessing the brutality of the military conflict), but he also learned English and became a consumer of U.S. popular culture. In some ways, de la Huerta might be considered an Anglophile as well due to his familiarity with U.S. culture and his many years living in the United States. By contrast, Calles and Obregón (and even more so, the "lesser" Sonorans introduced above) showed only limited interest in the English language and U.S. culture. Calles, for example, never learned to speak English well, despite spending five years in exile in San Diego.

In addition, even a cursory analysis of the Sonoran protagonists, such as the one presented above, demonstrates the pitfalls of following Aguilar Camín's lead in overgeneralizing the Sonorenses as a united group. After all, they spent much of the 1920s killing and

persecuting one another: by the end of Calles's term as president, Alvarado, Diéguez, Serrano, Gómez, and Obregón had fallen victim to assassination; Hill had died under suspicious circumstances, and Maytorena and de la Huerta lived in exile. Only Calles and Rodríguez remained in Mexico. In addition, there were significant political and personal differences even between the two patriarchs, Calles and Obregón. For example, the latter lacked Calles's virulent anticlericalism: when Obregón's private secretary married Calles's favorite daughter in a religious ceremony, Calles sent Obregón to attend in his stead. Their alliance remained a product of convenience, and it nearly collapsed on two different occasions: in 1916, when Obregón wished to pave the way for his brother to assume the governorship of Sonora and Calles stood in his way; and in 1925–1926, when Calles at least considered preventing Obregón's return to power.

More recently, a more detailed and insightful picture has emerged with the work of Ignacio Almada Bay of the Colegio de Sonora, himself a relative of several of the Sonoran protagonists and a historian intimately familiar with the familial and clientelist networks of the era. Almada deftly divides the Sonorans into two blocs: the "civic Liberals," the Maderista generation of 1910; and the "authoritarian populists" who did not join the revolution until 1912 during the war against the Orozquistas. At the heart of the civic liberal tradition was the Maderista quest for effective suffrage as well as local autonomy. Most civic liberals were revolutionaries of the first hour who had supported Madero in 1910. Following Anglo-Saxon notions of a federalist democracy, the civic liberals believed that political equality, municipal autonomy, and effective suffrage would allow all Sonorans to express their grievances and promote their goals. Because this political tradition held out the promise of self-government for indigenous populations, it found widespread support among Mayos and Yaquis. The authoritarian populists, many of whom held minor political offices in the Porfiriato and joined the revolution only during the Orozquista revolt in 1912, combined a commitment to material improvements for the impoverished majority with a desire to centralize political authority and a deep-seated opposition to the Catholic Church. Manifesting their intellectual debt to nineteenth-century Positivism, they shared the Científicos' belief in material progress, public education, and rationalism. They were centralists who planned to subordinate local autonomy to their greater vision. Calles was the authoritarian populist *par excellence* (Almada 2009).

These previous works point to a possible scholarly synthesis regarding the Sonorenses that will highlight the importance of clientelist and familial networks in building a new and highly fluid governing elite. This synthesis will need to take into account the close business connections among many of the Sonorenses (Gómez Estrada 2002). In addition, it will also need to address, in a serious fashion, their political and ideological universe. Even though one might see the discourse of rulers as expedient and driven by circumstance, that of the Sonorans—and particularly the two patriarchs, Obregón and Calles—set the tone for a ruling party that dominated the presidency longer than any other party in Latin American history.

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Creating a Revolutionary Culture: Vasconcelos, Indians, Anthropologists, and Calendar Girls

WILLIAM H. BEEZLEY

> The great brief intellectual flowering
> which we succeeded in creating would
> not otherwise have been possible, for
> the hardest thing to improvise is culture.
> Everywhere we found intelligent men of
> good will who in the midst of indifference
> and skepticism were almost heroic.[1]

Revolutionaries set out to create a new culture and a more inclusive society at the beginning of the 1920s. Less heralded than land reform and worker organization, the cultural campaign still received general fanfare and widespread acceptance, largely through the educational initiatives inaugurated by José Vasconcelos, the secretary of the newly re-created Ministry of Public Education (1921) during the Alvaro Obregón administration (1920–1924). The Secretary had a deep-seated commitment to education and earlier—while in exile in Lima, Peru during the presidency of Venuestiano Carranza (1916–1920)—he had developed an educational plan. His proposal for the new ministry was inspired by Anatoly Lunacharsky, the first Soviet commissar for Enlightenment in charge of culture and education; although Vasconcelos believed he had created a simpler and better organized plan than the Russian program.

   The Vasconcelos program, as succinctly stated by Leonora Saavedra, "… aimed at incorporating the … people—including the indigenous communities—into a unified, literate, Spanish-speaking nation, with a modern, secular, standardized education based on Western civilization at large, and Hispanic culture in particular." That is, he envisioned the creation of a national identity that shared both a mixed ethnicity and Hispanic culture (Saavedra, 2009). The program encompassed the entire nation (the Porfirian ministry of education under Justo Sierra had jurisdiction only in federal territories, such as the Federal District) and called for a three-part administration of schools, libraries, and

fine arts. The latter had responsibility for the instruction of singing, drawing, and physical fitness in all schools and supervision of existing institutions such as the Academy of Fine Arts, the National Museum, and the Conservatories of Music. Vasconcelos identified what he considered two exigent situations, the Indian inability to speak Spanish and the widespread population who were unable to read, and thus he created provisional departments to teach Spanish to the Indians of the countryside and literacy throughout the nation, but especially in the cities. To reach the Indian populations, he drew on the model of Spanish missionaries by creating teacher missions that he called "Missionaries of Indigenous Culture and Public Education," and that ideally included the basic instructor and at times others expert in agriculture, arts, and crafts. He envisioned, among his more exaggerated plans, what he called "village public readers and musicians". The first would read aloud history, geography, and newspapers in the plaza, and the second would play tunes to awaken local interest in traditional melodies. Later ministers would add outdoor theaters and had newspapers posted to help the general community education (Jiménez Alarcón, 1986).

The need for an educational program to create a standard national level of literacy and sense of national identity did not originate with Vasconcelos, but rather had been the subject of both political and intellectual concern for some years. Porfirio Díaz, in his famous interview with James Creelman that in a sense launched Francisco Madero into a revolutionary career, spoke passionately about the need for a national educational campaign. He told the U.S. journalist, "I want to see education throughout the Republic carried on by the national Government. I hope to see it before I die. It is important that all citizens of a republic should receive the same training, so that their ideals and methods may be harmonized and the national identity intensified. When men read alike they are more likely to act alike." (Creelman, "President Díaz, Hero of the Americas," in Joseph and Henderson, 2002, p. 290.) Although the need for education was widely discussed, it was nevertheless Vasconcelos who developed a national program.

Vasconcelos has remained highly praised for his campaigns as Minister of Public Education, even when his rural programs and desire to have students master Greek classics such as Plato and Homer were described with gentle sarcasm (he had once told Obregón he wanted to distribute 100,000 copies of the *Iliad* throughout the countryside), and his program thus explains the availability still today of cheap copies of Dante's *Inferno* in public markets (Vasconcelos, 1967, p. 158; Vogel, 2010, p. 58). He has received widespread praise for his rural educational program, in which the Ministry, under the direction of Rafael Ramírez—who remained in this position under several revolutionary presidents and represented Mexico at the II Conferencia Interamericana de Educación (CIE) in 1934 in Santiago de Chile (Kiddle, 2010, chapter 4, p. 4)—and Roberto Medellin, dispatched educational missions into the countryside (Vaughan, 1978, 1997, and 2006). Young women especially became education evangelists, and the secretary has received praise—"in the whole history of Mexico there does not exist any official project for the redemption of women comparable to or as practical" (Franco, 1989, p. 103, quoting José Joaquín Blanco)—for creating opportunities for females. Vasconcelos has also been acclaimed for turning the walls of public buildings over to art as the patron of Diego Rivera, David A. Siqueiros, and José Clemente Orozco, who became famous worldwide as the grand masters of mural art (Charlot, 1967).

This evaluation stands even though, beginning with his 1929 presidential campaign fiasco, Vasconcelos became increasingly controversial because of his racial and later racist views, his increasingly fascist politics, and his misogynist social attitudes. The latter, one

author euphemistically excused (Conn, 2009, p. 42), saying, " … he chafed under the restrictions of family life". As for his racist views, embedded in discussions of the Mestizo and the Cosmic Race before 1929, Joshua Lund finds them rather conventional because they are built on interpretations concerning the mestizo developed by Positivists, beginning with Gabino Barrera and continuing through Andrés Molina Enríquez (quote, Franco, 1989, p. 103; Lund, 2006, pp. 109, 110, and 222, ft. 8) and Justo Sierra (O'Gorman, 1969). Moreover, as regards racial issues, by the early 1930s, Vasconcelos wanted his nation to get in step in the direction of the future represented by Adolf Hitler and German Nazism (Benjamin, 2000).

Historians and other scholars over the past two decades have reached a number of conclusions and interpretations about the cultural revolution, Obregón's administration, social programs, indigenous peoples, and official mestizaje as redemption of the nation; these studies intimate the need for a reassessment of both Vasconcelos as Minister of Education and his programs of education, art, and music (Knight, 1994, provides an excellent place to begin a review). What becomes immediately apparent is that several essential persons in the ministry, such as Joaquín Beristáin, Eulalia Guzmán, and Rafael Ramírez, have been ignored, pushed to the background where they stand in Vasconcelos's shadow. Moreover, other successful ministers, without Vanconcelos's gift for self-promotion, have been overlooked, despite their significant achievements. Perhaps the best example is Gabriel Malda, head of the Department of Public Health, who directed successful campaigns against infectious diseases that dramatically improved heath conditions within the nation (Soto Laveaga and Agostoni, 2011).

A reevaluation of Vasconcelos appears necessary. It has begun with the documentary, "La Passion de José Vasconcelos," directed by Alvaro Vázquez Montecón and written by Lucia Beltrán (México Nuevo Siglo, 2002) using newly available documents, but a full scale review remains pending and urgent. The approaching conclusion is that Vasconcelos's significance as Minister of Public Education, depending on the specific program, has been both over- and under-estimated.

A number of scholars and biographers divide Vasconcelos's career at his 1929 unsuccessful presidential campaign, but his politics and his service as Secretary of Public Education ended in 1925, making this a convenient point to assess his efforts at high theory and deep philosophy without the bitterness and extremism that followed. In 1925, he published *The Cosmic Race*, his classic statement on the Mestizo and the significance of mestizaje for Mexico and Latin America. This coincided, as Joshua Lund has noted, with the first national recognition for Manuel Azuela's novel of the revolution, *Los de Abajo*, and the death of Heriberto Frias, author of *Tomochic* (Lund, 2006, p. 105). For many intellectuals these events resulted in a moment for reflection on mestizaje in the views of these three and others who discussed these issues. The result was to emphasize the concept as a national political policy.

Vasconcelos became duly famous for his promotion of the Cosmic Race, personified as the Mexican mestizo, who represented biological merging of the Spanish and Indigenous peoples, with the admixture of at least the cultures of African and Asian individuals as well. The mestizos, in his judgment, would form the new nation, with a culture that was unmistakably Hispanic. In order to achieve this, he intended to establish a mass culture with the mass distribution of "both canonic literary and musical works, and everything that could be claimed as national and Hispanic" (Saavedra, 2009, p. 290). He published his classic statement on this topic in 1925 after he left the ministry, but he gave his views their earliest expression in his 1907 thesis in law school and they continued in

short pieces and speeches thereafter. He acted on his views from 1921 to 1924. This Cosmic Race meant the Mestizos, who would become the new, revolutionary Mexicans, and would in part spring from the regenerated indigenous peoples. The general revolutionary program of Indigenismo—the concern for the indigenous peoples—resulted, in the hands of Vasconcelos, in several programs for Indian assimilation, especially as designed through education in the countryside. His goal was to redefine "… living Indians from a national embarrassment into an integral component …" of the new revolutionary nation (López, 2002, p. 317). He developed a plan for what he considered social regeneration for rural, especially indigenous, peoples through cultural programs that included traditional and folkloric demonstrations with related popular arts, music, dances, and handicrafts in the rediscovery of the grandeur of the indigenous past. Vasconcelos summed up his plans, saying: "… Indianism means going back for millennia"—in other words, Vasconcelos envisioned a uniform mestizo population, and opposed the goal of preserving indigenous cultural diversity promoted by several anthropologists (Vasconcelos, 1967; pp. 151–2, 169–70, 130).

In the growing cities, Vasconcelos's ministry, resolute in its nationalistic and educational ideals, initiated a major adult literacy campaign under the direction of the exigent department in the charge of Eulalia Guzmán. She would later achieve fame for her studies of pre-Columbian indigenous stone monuments in the 1930s and in 1949 she gained notoriety for proclaiming that the bones discovered in the village of Ixcateopan, Guerrero were those of the last Aztec Emperor, Cuauhtémoc (Johnson, 2004).

The secretary's staunch nationalist views can be seen in his urban program of physical education. He said that he hated sports because he considered them "… palliatives for the absurd life-system created by big business and the deplorable climate of England" (Vasconcelos, 1963, p. 180). In his effort to eliminate foreign influence in the revolutionary society, he wanted to rescue physical education in particular from the United States Protestant institution—the Young Men's Christian Association—that had first arrived in Mexico in 1904. The YMCA had grown to three clubs in the capital with branches in Monterrey and Chihuahua by the 1920s, and the program was in the hands of Mexican administrators (Avent, 1996; Avent, 2008a and 2008b). Nevertheless, Vasconcelos launched a program to build gymnasiums and open-air swimming pools that were superior to those of the YMCA in order to demonstrate the vitality of the revolutionary regime.

The secretary placed these programs in the hands of what historian Guillermo Palacios calls the "pedagogical intellectuals," several from the Ateneo de Juventud of which Vasconcelos had been a member, and they controlled official cultural programs to a large extend until 1940 (Palacios, forthcoming; Brading, 1984, pp. 71–2). The members of the Ateneo formed a generation of intellectuals who obviously had a major influence on Vasconcelos and his policies in the Ministry of Education, but they also contributed to policies across the revolutionary government. The members, especially Pedro Henríquez Ureña, Alfonso Reyes, Martín Luis Guzmán, and Vasconcelos, have been given scrupulous attention in the excellent studies by Susana Quintanilla (2008; 2009).

Vasconcelos drew on his intellectual associates, including Antonio Caso, Gerardo Murillo (Dr. Atl), Adolfo Best Maugard, and Roberto Montenegro—who came from the Ateneo—and also a younger generation, a circle around Best Maugard. The Ateneistas focused primarily on the written word, both essays and literature, and their young colleagues looked to painting and, in several cases, film including both feature length cinema and ethnographic documentaries. Together they attempted to give value to the

indigenous past by promoting events that would illustrate the indigenous base of national identity. Stephen Lewis refers to the circle of intellectuals in favor of rural, Indian peoples, but who made no contribution to its formulation, as "Salon Indigenism" (Lewis, 2006, p. 178). Those close to the Minister, as Rick López has shown, singled out indigenous art and music as the base for a nationalist aesthetic. For example, professional dancers, notably Anne Sokolov, gave folkloric ballets such as *Fantasía Mexicana*, and composers Manuel Ponce and Carlos Chávez wrote classical music inspired by popular examples (López, 2006; Palacio Langer, 2008); Pérez Montfort, 2007). Exhibitions of typical handicrafts were celebrated as expressions of the authentic national heritage, but neither Vasconcelos nor intellectuals such as Francisco Zamora, who used the authorial name Gerónimo Coignard, saw much in these items beyond inspiration for academy-trained artists (López, 2006, pp. 24–5).

The Vasconcelos campaign, especially these cultural programs for national integration, were a step—but only a step—ahead of similar campaigns in other Hispanic American nations with large indigenous or other unassimilated populations. During the 1920s and 1930s this resulted in programs that used the ideology of mestizaje, often mixed with the "anti-materialist and pan-Latin American school of thought spearheaded by the Cuban José Martí, Uruguayan José E. Rodó, and Mexicans José Vasconcelos and Antonio Caso." In this latter development, mestizaje rejected European theories of racial degeneration and positivism and U.S. economic and political policies. Moreover, mestizaje managed most of the time to balance the competing views of both hispanismo and indigenismo as the main source of national character. These inclusive definitions of national identity and assimilation programs, particularly promoting education and folklore—often described as populist movements—dominated until the 1980s, until the idea of mestizaje was undercut by ethnic politics on the one hand, and by intellectual deconstruction by Angel Rama, Guillermo Bonfil Batalla, and Roger Barta, on the other (Chamosa, 2010; Miller, 2004). Moreover, other scholars have begun to revise interpretations of what mestizaje actually means. Peter Wade, an anthropologist, has found that in Latin America individuals of mixed descent may think of themselves not as a *synthesis* but rather as a *composite* of different ancestries. These persons, according to Wade, may imagine themselves as a mosaic of indigenous, African, or European elements that are expressed in different ways at different times (Wade, 2005).

In the 1920s Bolivian and Peruvian leaders, in particular, shaped programs for what they deemed indigenous redemption. They often modeled their programs on the Vasconcelos campaign for the folklorization of rural culture that was termed indigenous and its incorporation into national identity (Kuenzli, 2010, p. 249). In Peru, Cuzco community leaders at times praised the example of Vasconcelos as they revamped local mestizo music, dance, and costumes into a folkloric Inca culture that they attempted to promote as both national Peruvian and Pan-Andean identities (Mendoza, 2008, pp. 17, 46–7, 54, 127). The promotion of neo-indigenist Inca music was viewed as defense against both foreign and modern music, especially the popularity of recorded tangos from Argentina and fox trots from the United States, both seen as a threat by 1927. The major response came in a deeper search for a unique national identity (Mendoza, 2008, pp. 50, 95,106, 191 ft. 42) following the example of Vasconcelos. Mestizaje, then, never had the same force as an ideology in Argentina as in Mexico or Peru, although the Argentine assimilation programs were similar to it. Nevertheless, ideological discussions framed the rise of folklore as an academic discipline and artistic expression in Argentina, at the same time as individuals concerned with building a united

citizenry developed an assimilation program not only for the indigenous, but also for the immigrant population that by 1910 outnumbered the native peoples. On the other hand, the Argentine folklorists, like others in Latin America promoting cultural assimilation, turned to mestizaje and indigenismo in order to counter old world racism, and used paisano culture as a counterweight to urban cosmopolitanism by calling for the incorporation of rural cultural practices in the schools (Chamosa, 2010, pp. 25, 14, 16).

The hemispheric programs in mass education helped promote widespread admiration for the Secretary Vasconcelos's policies and ultimately turned on his rural education program. Certainly Vasconcelos inspired this program, but its conception and its execution as everyday practice were two different things, and it seems more and more apparent that the person who put the plan into operation was Rafael Ramírez. At the level of theory, Vasconcelos certainly drew on the legacy of intellectuals who believed it was both possible and necessary to assimilate the indigenous peoples, especially through education. That is, he believed in the creation of a cultural hybrid, the Mestizo, who represented the Cosmic Race. Of particular importance in this regard were the conclusions reached by Andrés Molina Enríquez, author of the widely read *Los Grandes Problemas Nacionales* (1908). At the level of practice, meantime, Ramírez devoted his attention to sending out teachers, overseeing their activities, and dispatching instructions and warnings about village life. Of particular concern to Ramírez was the prospect that the teachers might slip into using the local language rather than Spanish, and ultimately, like the occasional foreign traveler and the zealous cultural anthropologist, "Go Native," becoming a member of the indigenous community (Lewis, 2006, pp. 179–180; Rockwell, 2007). Teachers at times faced community or family opposition to the schools that removed children from the workforce, taught them behavior contrary to community legacies, and encouraged ambitions that many parents thought were beyond the children. Success had a checkered character, depending on both families and communities. Ramírez, with various titles including the Director of Rural Education, carried on the daily activities of the teachers. He had been educated in a normal school and had taught in both the countryside and the city. He managed the day-to-day programs as the attention and praise went to Vasconcelos.

The celebration of Vasconcelos notwithstanding, the major support for indigenous peoples came from anthropologists. Manuel Gamio—regarded as the father of Mexican anthropology—and Moisés Sáenz, who at the same time often were at odds with each other and with the Vasconcelos program, looked at rural projects not for social regeneration but as campaigns to reinvigorate the indigenous communities. The inspiration of these anthropologists was Colombia University professor Franz Boas, who had served as the first director of Mexico's Escuela International de Antropología founded in 1910. Boas had developed theories of cultural relativism that rejected the prevailing theories of racial evolution. The anthropologists trained by Boas, or who followed his analysis, attempted model community programs of education and public health to give vitality to indigenous villages (Vaughan and Lewis, 2006, pp. 10–11). The indigenistas, who were not all anthropologists, first found a place in the new revolutionary bureaucracy in 1917 with the founding of the Dirección de Antropología in the Ministry of Agriculture. This agency set out to promote indigenous peoples. These Indigenistas such as Manuel Gamio, Lucio Mendieta y Niniez, Carlos Basauri, and Miguel Othon de Mendizabal attempted to combine revolutionary enthusiasm and social scientific zeal in order to document and preserve Indian cultures. Eventually the indigenistas fell into ideological conflicts during the Vasconcelos era, but they did achieve public prominence through the

Ministry of Education's Cultural Missions. Gamio initiated a pilot project during the 1910s in the Teotihuacan Valley. Other anthropologists endorsed the idea and attempted its implementation. A notable effort came through the efforts of the John Geddings Gray Memorial Expedition in 1928, jointly sponsored by the Ministry of Education and Tulane University. The indigenistas later found greater success through the Casa del Estudiante Indigena (1926), Educación Socialista (1934), the Departamento Autonómo de Asuntos Indigenas (DAAI) (1936), and the Instituto Nacional de Antropología e Historia (1938) (Dawson, 1998, 281). Anthropologists, especially Sáenz, continued model village programs under President Lázaro Cárdenas (1934–1940) in Actopán, Hidalgo and Carapan, Michoacán. From the beginning of the Vasconcelos era, these anthropologists also investigated the efforts of other Latin American nations with large indigenous populations to adapt successful programs. Sáenz, for example, traveled to Guatemala, Ecuador, Bolivia, and Peru in search of programs that could benefit Mexico (Beezley and MacLachlan, 2009, pp. 76, 115–6).

Vasconcelos's emphasis on an assimilation program for the indigenous generally receives discussion as the implementation of his theoretical construct of the Cosmic Race. Oddly, his youthful experience in Sasabé, Sonora—where tales of Apache attacks provoked his mother's cautionary stories should he be kidnapped, and provided them with the melodrama to insure they would be remembered—was twisted by the Minister into a personal hero myth that has not been connected to his opposition to preservationist programs. Moreover, during this time the federal army, in the process of pushing the Yaqui people off their lands, fought a brutal war that included deporting captives to the henequen fields of Yucatán. Nothing in these frontier experiences of raids and wars, it would seem, might have created for Vasconcelos an argument for preservation programs (Franco, 1989, p. 104, quoting Vasconcelos, *Ulísis Criollo,* p. 290).

Rather, the mestizaje that created the nation's hybrid population—the Cosmic Race— legitimated the revolutionary government through programs to include the entire national population. In both theoretical discussions and policy formulations of the Mestizo people, the critical foundational group was the Indian. The program for these people was one of assimilation that has been explained as "intercultural democratization," "the positive mark of … national identity," "de-Indianization," and, "by extension, ethnocide"(Lund, 2006, pp. 62, 66–7; references in order to Néstor García Canclini, Enrique Krause, Guillermo Bonfil Batalla, and Joshua Lund).

In addition to the anthropologists committed to preserve indigenist communities, another group that rejected the Vasconcelos cultural program included various intellectuals, such as the Peruvian José Carlos Mariátegui and Mexicans such as the novelist Martín Luis Guzmán, the playwright, Roldolfo Usigli, and several independent-. minded painters, who by the end of the 1920s were rejecting the muralists' resolute revolutionary images for national social campaigns and turning to more cosmopolitan and individual subjects. Beyond Orozco's later murals one could name, for example, María Izquierdo, who, beginning in the late 1920s, painted a series of nude females who were obviously neither indigenous nor rural, unlike the women portrayed by the muralists (Mariátequi, 1928; Guzmán, 1925; Usigli, 1938; as noted by Lund, 2006, 113, 222, ft. 7, 224 n. 18113, 222, ft. 7, 224 n. 18; Adriana Zavala, "María Izaujierdo," in Vaughan and Lewis, pp. 67–78).[2] These painters were soon joined by photographers who also rejected the indigenous and rural sentimentality of the muralists in general.

After the departure of Vasconcelos, during the administration of Plutarco E. Calles, new efforts in the educational ministry turned to the creation of the Casa de Estudiante

Indígena, designed to train indigenous youths who were intended to return home and become community educators and leaders. During its brief existence from 1927 to 1932 under director Enrique Corona, the boarding school Indian students served as the case study for Indianistas led by Gonzalo Aguirre Beltrán. The focus soon became to make the institution a normal school for Indian teachers, who were expected by the founders to return home. Highly publicized throughout its existence, it soon closed, because the students preferred to remain in the city, although a few did return to their communities (Dawson, 2004 and 2001). The anthropological view of preserving indigenous cultures through native language became national policy in 1943, when Jaime Torres Bodet became Minister of Public Education and initiated a literacy campaign that included bilingual education in Indian learning centers (Benjamin, 2000, p. 468).

Scholars and others recognized that in the formation of the Cosmic Race through the promotion of the Mestizo, the indigenous cultures would be annihilated. These scholars, as noted by Alexander Dawson, include Arturo Warman, Marjorie Becker, Claudio Lomnitz-Adler, and Mary Kay Vaughan (Dawson, 2001, p. 262).[3] What has been largely ignored, or not generally appreciated, are the efforts Vasconcelos made, perhaps in anticipation of the disappearance of Indian cultures, to document the nation's indigenous cultural diversity.

His efforts may simply have been an attempt to identity, survey, and record the nature of the nation's indigenous peoples. A call for suggestions as to how the nation might celebration the centennial of the achievement of independence in 1921 resulted in one call for the creation of maps based on systematic investigation "… to find out what groups lived where, how they lived, in what numbers, what languages they spoke, and what traditions they followed." The government had never accomplished this because of its lack of expertise, funds, and, possibly, interest, so Vasconcelos seems to have undertaken this as a responsibility (López, 2002, p. 317). On the other hand, perhaps his motive came from his expectation that the living communities were destined to disappear, and he wanted to preserve descriptions, images, and examples of their cultures for posterity. This resulted in programs involving teachers, artists, writers, and intellectuals who visited remote regions of the country to record the diverse cultural traditions of village ethnic groups through descriptions of markets, archeological ruins, fiestas, houses, corn patches, and daily life. Vasconcelos requested, apparently through directives sent by Ramírez, that the teachers collect information on local practices and customs. This information was intended to become an important profile of ethnicity and ethnography of the countryside for both descriptive purposes and policy making (See, for example, information from the teachers in rural communities that discusses customs, noted on 3X5 cards, that forms part of the Frank Tannenbaum Collection, at Columbia University, New York City.)

Beyond the teachers posted in villages as part of the educational campaign, Ramírez organized educational missions to teach music and use it to overcome community resistence. Investigators have generally ignored this aspect of the rural educational program. A plan was developed in 1922 to send teams of specialists into the countryside for three- to six-week community visits, in some cases ahead of more permanent teachers for the community. The leader, who also served as a teacher trainer, led the mission that included specialists in "agricultural science, social work, health education and recreation, domestic sciences, building sciences, 'small industries' (crafts and trades such as soap-making and tanning), and music." Ramírez directed the first mission in 1923 for a three week visit to Zacualtipán, Hidalgo; Alfredo Tamayo served as the first musical

specialist and reported that he taught both adult and children's groups to sing the national anthem as well as other patriotic songs, such as "La Cucaracha." The ministry judged the mission a success, and sent it to other locations as well as creating new teams. By the end of Vasconcelos's term as minister, 8 missions were operating, and by 1945 there were 18 active groups. The music instructor, besides teaching singing to both children and adults and organizing music groups, also had the responsibility of collecting folk music in the community.

Vasconcelos or Ramírez or both saw the radios sweeping across the country in 1930s as an ambiguous medium, bringing more sophisticated music—such as the Canción Mexicana (see below)—to audiences, but also broadcasting what the Minister saw as disgraceful foreign music such as rumba, tango, and U.S. jazz. The program, as it developed after 1924 into the 1940s, received sturdy praise from John Dewey in the United States. Ramírez became the director of the Cultural Missiones in 1927 and he reemphasized sport, art, dance, and popular music beyond basic education. He built these programs, in part, on the theories he had learned and applications he had observed in the United States where he studied education in 1925 and in 1927. He continued in the Department of Education until his retirement in 1946. After World War II, the program he had worked with for so many years was trumpeted by UNESCO as a model for developing nations (Tovey, 1999; quotation p. 4; Jiménez Alarcón, 1986).

Collecting folk music was part of Minister Vasconcelos's design to preserve a record of the countryside. He also wanted ethnomusicologist Joaquín Beristáin to record the music and sounds of the "popular soul," following a project initiated during the Porfirian years by Manuel M. Ponce (Monsiváis, 1997, p. 173). Moreover, working through the SEP's Dirección de Cultura Estética, Beristáin had a deep involvement in the Minister's musical projects, especially the rescue effort, with several investigators under his direction working to preserve regional music that seemed at the point of disappearing (Monsiváis, in Aurelio Tello, coord., 2010, p. 211). Several of these efforts involved the Canción or Mexican song that Miguel Ponce promoted through his arrangements and compositions. Both Vasconcelos and Ponce thought the Canción could be used to create a national identity, but they differed on how to do it. Vasconcelos intended to create a mass culture, and called on Beristáin to achieve this through what has been called "… collective Neo-Platonist flights of the national soul" (Leonora Saavedra to author, June 13, 2010).

The Vasconcelos project for music, whether devised by the minister or Beristáin, used developments in urban popular culture, especially popular music and teatro de género chico, and accepted the importance of the Canción that had been advocated by Manuel M. Ponce. The campaign promoted "… Mexican (Hispanic, really, as in from Spanish-speaking countries) songs …" to thwart, as Vasconcelos said, the increasing popularity through movies and recordings of foreign popular genres such as the fox trot (Leonora Saavedra to author, June 13, 2010).

Vasconcelos, in one of the most successful aspects of his preservation program, hired a group of photographers to go into Mexico Profundo—the backcountry—and photograph the indigenous cultures in their wide-ranging and colorful diversity. His photographers included Luis Márquez, Alvaro Bravo, Hugo Brehme (a German), and Charles Waite (an American). He intended for the photographers to capture in particular the clothing styles and cultural practices, along with the daily activities, of indigenous women (Villalba, 2006, p. 24; Alexander, 2008). They took thousands of photographs of indigenous individuals, especially women, and their culture practices at this time.

Hugo Brehme and the others with their thousands of photographs "… produced a remarkable record of Mexico's rural and urban life. They documented a world vanishing before their very lenses" according to Susan Toomey Frost (Frost, 1999, p. 68). Brehme established a flourishing postcard business, while providing a variety of photographic services. He quickly began to produce sets of postcards that attracted a following among tourists. These became so prevalent that they were misidentified in some cases as the work of Agustién Casasola, and a whole set of 33 images, with no identification beyond the title, declares that Atlee B. Ayres did both text and photographs for *Mexican Architecture:Domestic, Civil & Ecclesiastical* (1926). Brehme, through his photography, became part of the intellectual and artistic circle that included the foreigners Bernice Goodspeed, Frances Toor, and Manuel Toussaint. His postcards focused on major tourist destinations, adding to their popularity.

Ultimately, the most popular photographs were those of Luis Márquez. He had grown up in the artistic, bohemian world of actors, artists, and intellectuals concerned with issues of nationalism and identity in Mexico City. His father, José, was the agent for the famous actress Virginia Fábregas and the promoter and director of programs for Esperanza Iris at the Teatro Principal, later renamed the Teatro Iris, where among other performances he directed the sensational zarzuela, *Chin Chun Chan*. During the worst of the revolutionary fighting, in 1914, he relocated his family to Cuba and led the theater company on tour throughout Latin America. The youthful Luis took up photography, become skilled and was soon well known in Havana. When he returned to Mexico City in 1921, he became a member of one of the intellectual circles attempting to foster the cultural revolution. He was hired in 1922 as a member of the Taller de Fotografía y Cinematografía (The Photographic and Cinemagraphic Studio) of the Department of Bellas Artes in the Ministry of Education. He soon became devoted to documenting the indigenous cultures. This experience shaped his life.

The first indication that Márquez's position would be more than a bureaucratic desk job came when he was sent with Father Canuto Flores, ethnographer Miguel Othón de Mendizábel, and the musicologist Francisco Domínguez to document the fiesta in Chalma. The result is widely regarded as Mexico's first documentary film. Who in the ministry sent the three to Chalma? An educated guess finds the lurking presence of Minister Vasconcelos's Head of the Department of Artistic Education, Adolfo Best Maugard, a member of a collateral intellectual circle that included Rosa and Miguel Covarrubias and others, many of whom shared an interest in experimental films.[4]

Whoever inspired the trip to Chalma, this experience gave direction to Márquez's career and life as his first encounter with rural peoples, and led him to explore the nation's backlands. His representation of the countryside and its residents was always picturesque. In 1923 Márquez visited Lake Patzcuaro and the Island of Janitzio, where he participated in the nighttime celebration of Day of the Dead. When he returned he organized a night of "Danzas típicas del Estado de Michoacán y el ritual de la Noche de Difuntos" with the assistance of Miguel Othón de Mendizábal and Francisco Domínguez in the Murciélago Theater. This soon became the experimental theater promoted by intellectuals, especially the members of the Estridentista movement, who called for an expressive and popular art that stressed regional diversity to avoid any folkloric standardization (Schmelz and Peñaloza).

Márquez continued to work over the Janitzio experience in his mind for a number of years, while he was employed in the early movie industry. He participated in the production of five Cuban and three Mexican silent films and worked with Sergio Eisenstein

filming *Que Viva México*. Finally, his ideas coalesced and resulted in the movie, *Janitzio*, made with Emilio Fernández, El Indio, as its star. The now classic film debuted in 1935.

Going to the pilgrimage site of Chalma had had a profound effect on Márguez. On this visit, he had purchased a complete regional costume of one of the participants. He became entranced with the clothing of indigenous women and collected examples of each cultural group that he photographed. His collection eventually reached 2,800 complete costumes, all meticulously documented. He said later that he had been approached several times to sell the collection, but that he intended it to serve as the basis for a Museo del Traje. In 1977, the collection was donated to El Claustro de Sor Juana, today part of the Colegio of the same name, and it remains an invaluable archive and index of Indian material culture during the 1920s and 1930s. Meanwhile, Márquez worked in and around the movie industry, primarily as a still photographer, for decades. His photos numbered some 200,000 pictures of prehispanic, colonial and modern art, landscapes and indigenous customs, most of them part of his archive at the Instituto de Investigaciones Esteticas, UNAM (Tibol, 1989, pp. 116–122).

Almost immediately after his first photographic and costume purchasing trip into the countryside, Márquez began organizing "folklore sketches" of different regions in which he acted as host, providing information on the history of the indigenous group, explaining cultural practices, popular traditions, and the local music, and explaining each item of clothing. This no doubt built on his experience at the Murciélago Theater. He continued his involvement with the theater into the 1930s as an advisor for costumes and choreography for the Teatro de Revistas. His sketches with nationalistic themes proved highly popular. He also worked with Julia Ruiz Sánchez to organize a cycle of conferences about the "Traditions and Customs of Mexico." Amalia Hernández, who founded the ballet folklórico in 1952, acknowledged his influence.

His photographs captured contemporary indigenous life and vestiges of the pre-Columbian past that, through the success of Vasconcelos's promotion of educational and folkloric programs, reclaimed a vital national heritage. The photographic campaign both anticipated and contributed to the programs of the Murciélago Theater (Barberán Soler, 1997). Spectacles there included Best Maugard's "Gran noche mexicana" and the scenic sketches produced by Ermilo Abreu Gómez, Germán Cueto, and Tina Modotti. These programs represented the cultural and artistic influence of both indigenous and popular cultures expressed in dance, theater, literature, movies, and photographs. They also related to other popular programs such as the contest to proclaim the "India Bonita."

Such initiatives created nationwide interest and recognition of the Indigenous. There appeared an unusual connection between the official Vasconcelos program and the national cultures of daily life. Not for the first time, small businessmen found an economic opportunity that served in the creation of ideas about national identity (Beezley, 2008, pp. 147–9). Printers saw in these developments a commercial opportunity. In 1922 Salvador García Guerrero and Francisco González de la Vega founded the publishing company called Enseñanza Objetiva, and by 1935 it had become the first printing house to produce calendars in Mexico. Printing competitors, such as Galas de México, quickly followed.

Once printing companies undertook the production of calendars, they hired painters to produce calendar images. Beginning in the 1930s, they portrayed on canvass folkloric figures, especially indigenous women, Charro horsemen, revolutionaries, and landscapes,

in particular images of the Virgin of Guadalupe, the Jarabe Tapatío, and the volcanoes that dominated the countryside. These paintings were then photographed and reproduced through chromolithography for annual calendars. Large enterprises such as the José Cuero tequila company ordered as many as 200,000 calendars to distribute through cantinas. Of course, there were many other free and for sale calendars that were produced in lesser quantities. The artists in the 1930s worked in oils, on large canvasses that often reached 10 feet in width to accommodate the large cameras in use at the time. Prominent calendar artists A.X. Peña, Antonio Gómez R., Xavier Gómez, and Eduardo Cataño worked from photos to provide their calendar images with an accuracy that made regional locations immediately apparent.

The artists who painted the calendar images drew heavily on the national imagery created during the Vasconcelos years in the Ministry of Education that had promoted revolutionary culture and national stereotypes. Vasconcelos wanted every pupil to learn the *jarape tapatío*, today recognized as the national folk dance, and this quickly became a major calendar image. Artists rented the photographs taken by Luis Márquez and other veterans of the Vasconcelos campaign to produce their paintings and to achieve precise detail, on occasion they also paid to use huipiles, rebozos, serapes, or other items from Márquez's costume collection. Márquez encouraged this during the 1930s when he was the artistic advisor to Imprentas Galas (Villalba, 2006, pp. 17, 19, 22–5; on p. 25 there is an example of a photography by Márquez and a calendar painting by Salvador Monroy; Schmelz and Peñaloza, 9).

The images on the calendars received national distribution, often providing the only artistic decoration within the hovels in poor rural communities. The pictures appeared on other advertising items, such beer trays and folding fans. Moreover, Galas de México began successfully exporting the calendars to international Mexican communities in the United States, Cuba, and Haiti, and to other Central and South American nations. The ethnic features of the calendar images, often based on photographs, also inspired an artistic renaissance in the 1930s, as Rufino Tamayo, Miguel Covarrubias, and Frida Kahlo painted indigenous figures, and film makers Gabriel Figueroa and Sergei Eisenstain featured ethnicity and indigeneity in their films (Villalba, 2006, pp. 36–7, 37–9).

These same Vasconcelos-inspired photographs by Márquez represented Mexico to international audiences, as the photographer participated in the World Fair organized to celebrate the centennial of Brazilian independence, the Ibero-American Exposition in Seville (1929–1930) and the New York's World Fair (1939–1940). His photographs won awards in the Brazilian fair, and in 1940 in New York he took over the Mexican exhibit and reorganized it.

Beginning in the 1920s, revolutionaries in the cities turned their attention to the countryside in the effort to create a new nation, with egalitarian society, economic opportunities, and a shared culture. As part of the Cosmic Race assimilation programs, national leaders attempted to recognize indigenous cultures as one of the characteristics that would unify the national society. Rick Lopez has explored efforts both to promote Indian cultures and link them to the new revolutionary national identity. One of the forms this took was the creation of the India Bonita contest sponsored by newspaper editor Felix Palavicini, beginning in 1921 in *El Universal*. Efforts to have communities submit photographs of their bonitas failed, and the editor soon resorted to sending photographers to the markets of the city looking for indias who qualified for the contest. Nevertheless many people remained confused, thinking that it meant individuals dressed as indias could participate in what they thought was some form of folkloric affair.

Eventually, it became clear the organizers sought indigenous women who had what urban Mexican considered marks of beauty, such as perfect teeth and a serene smile, only with darker eyes, a more oval face, and braids to contrast with the stereotypes of the Indians caricatured in urban folklore. The selection of judges emphasized that indianness was the major criterion for winning the contest. The judges (anthropologist Manuel Gamio, contest organizer and later head of the department of Fine Arts Rafael Pérez Taylor, nativist artist Jorge Enciso, and dance and theater authorities Carlos Ortega and Aurelio González Carrasco) selected María Bibiana over Ignacia Guerrero, the latter had light green rather than the requisite dark eyes, regarded by Gamio especially, relying on Jenk's Anthropomorphic Index of body measures of the races, as non-Indian. María quickly became an inspiration for artists. Dressed in her traditional clothing, she appeared in pictures on the front page of *El Universal* (August 2, 1921) and other sections showed her holding a gourd bowl and barefooted, and noted that Nahual was her native language and that she had rural Puebla origins.

María received invitations to important social and political events that helped make the India Bonita popular with the middle and upper classes, who gained an appreciation of the indigenous contribution to the new revolutionary society. The India Bonita became a popular symbol of the nation's promise to its indigenous population and the patrimony of authentic Indian traditions. Her popularity sparked musical scores—ironically including a fox trot called *La India Bonita*—plays, songs, and poems. Theater reviews such as Antojitos Mexicanos and Mexicanarias included more reasonable, less stereotypical views of Indians, as did the widely celebrated play by Julio Sesto "La India Bonita" starring Maria Conesa. Only 5 months after the contest, the Obregón government incorporated the India Bonita into the centennial celebration marking the achievement of independence from Spain. Both the India Bonita contest and the Exhibition of Popular Arts demonstrated the early effort to discover, validate, and promote things Mexican, beyond the programs in the Ministry of Education. It extended the nationalist commitment of the revolutionaries into the realm of aesthetics that began to play a vital role in narratives of ethnicity, class, and collective identity (López, 2002, pp. 291–328).

Evaluating the years of Vasconcelos as the Minister of Education, based on recent historical work, reveals that his achievements have clearly been both under- and over-estimated. The activities of Márquez alone demonstrate that in matters of documenting the nation's indigenous cultures, Vasconcelos's efforts in the 1920s—even if the intention was to preserve a record of peoples who would be erased by the Cosmic Race—have been undervalued. Curiously, it is this aspect of Vasconcelos's program that created the images of the nation's indigenous people, their activities, the landscape, the revolution, and the folklore. All of which received widespread distribution on free or inexpensive annual calendars owned by individuals across the nation. In cities and in the countryside, rich and poor, and male and female; everyone had calendars. These became the folkloric, popular images of the nation.

Great praise has been heaped on the muralists Rivera, Siquieros, and Orozco for picturing the nation's revolutionary, historical, and indigenous patrimony and, of course, today these images have become well-known across the nation through school books, television, and discussions of the national artistic heritage. Perhaps, none is greater than the Rivera mural at the National Palace that expresses his *indigenist* views. Called *The History of Mexico*, he created a visual narrative, with three major themes: the ancient cultural achievements, the Spanish conquest destruction, and the working class revolution; he finished it in 1935 (Rochfort, 2006, 51). The mural features Pre-Columbian iconography influenced by

Rivera's own affinity for indigenous art. Aztec mythology (eagle clutching serpent), monumental architecture, and allegorical references to the land and artistic production are all depicted in this mural. Incorporating indigenous iconography into his work became the medium by which Rivera idealized and crafted a visual syllabary that appealed to a wide audience and crafted the nationalist discourse of post-revolutionary Mexico. Although he embodied the spirit of revolutionary nationalism (which embraced indigenous cultures and exalted their contribution to the formation of the modern state), he also propelled aesthetically pleasing art onto walls that drew foreign attention and acclaim (Oles, 2002, 11–45; Stavans, 2002, 1–8; Cammack, 2010).

Nevertheless in the decades of the 1930s and 1940s this and other murals, one suspects, were not widely seen nor appreciated outside elite social and bureaucratic circles. Ordinary people did not regularly visit the presidential executive offices, the Ministry of Public Education building, the national prep school, or even the lobby of a prominent hotel. The murals at the Abelardo Rodríguez market near the Zócalo that were more widely accessible, were not painted by the three master muralists but by their acolytes (Sluis, 2006). Moreover, the opposition that appeared to the murals in the 1920s remains in large measure ignored. National Preparatory students mutilated the Orozco and Siquieros murals at their school in 1924. They demanded the murals be replaced and Vasconcelos complied. Rivera's work at the office of the Ministry of Public Education also received a good deal of criticism, but they were not defaced (Delpar, 2000, pp. 516–7).

The obvious conclusion finds that Vasconcelos and the muralists have been greatly over-estimated. The murals by the lesser known, and in several cases, foreign painters were the ones accessible to the general public. Pablo O'Higgins and others represented this group, although they were not widely championed (Vogel, 2010). The focus on the promotion of murals and art generally as the aesthetic of the cultural revolution ignores, for example, architectural innovations more generally available to the view of the public—and, in some cases, a result of other SEP programs—but also other developments. Urbanization and bureaucratic expansion, both revolutionary products of the previous decade, required the construction of buildings that expressed the ideas of a new modern nation. The government's commitment to assist the people could be seen in the building of a new third floor on the presidential executive building, required for the increasing number of bureaucrats needed for the expanded number of agencies. Architects built many new buildings in the new utilitarian style, or they turned to the Colonial or California Mission style that had been exempted from property taxes under a decree of President Carranza (1917–1920) in an effort to synchronize the Revolution with Hispanic heritage rather the French fashions of the Porfirian regime. Architects Carlos Obregón Santacilia and the brothers Nicolás and Federico Mariscal relied on details, such as tiles, fountains, stucco walls, and ironworks for government buildings like schools, the Ministry of Public Health, and even monuments. Furniture manufacturers, such as Antonio Ruiz Galindo's Distribuidora Mexicana, S.A, provided modern, utilitarian metal and wooden desks, chairs, and other furniture for the government's bureaucratic expansion (Bunker and Macías-González, 2011; Fernández, 1997; Olsen, 2004). Vasconcelos's direct and indirect promotion of construction projects deserves recognition.

Undervalued as well is Vasconcelos's promotion of art education through the work of Best Maugard and, at least indirectly, of music. The latter, through the Ministry's Department of Artistic Education, created groups of teachers committed to promoting art among school children, using books he wrote, to make art one of the bases of

nationalism.[5] As for music, the mestizo leaders, who received Vasconcelos's praise and who made up the Obregón government, brought with them mariachi music, the rural sounds of both the western (Jalisco and Michoacán) and northeastern (Tamaulipas) regions, that were quickly popularized as unique national music. In Peru, rural mestizo music, especially with the charango, was labeled as neo-Indianist, while in Mexico mariachi became the music that represented wistful feelings for a rural life that had never existed. In both nations, the countryside, especially the pastoral landscape, provided inspiration for compositions, and this coincided with the campaigns of Vasconcelos to have youths learn the music and dance of this non-existent national rural heritage through the folklorization of nostalgic attitudes. This popularization of rural life served as the groundwork for later sentimental ranchero movies, and reveals Vasconcelos as the romantic intellectual that he was.

Ranchero movies represent a legacy of the folklore programs of Vasconcelos, nevertheless, the dynamic movie industry contemporary to Vasconcelos's Ministry was that of Best Maugard and others attempting experimental films. This relationship needs exploration and the connection of several film makers back to the romantic ideals of Vasconcelos merits attention.

This romanticism, especially given that it has been ignored, must surely serve as a major theme in a successful biography of Vasconcelos; but as David A. Brading noted twenty-five years ago, one does not exist (Brading, 1984, p. 94; he listed as the best available José Joaquín Blanco, *Se llamaba Vasconcelos*, Mexico, 1977; Joaquín Cárdenas Noriega, *José Vasconcelos 1882–1982 educador político y profeta*, Mexico, 1982; and Gabriella de Beer, *José Vasconcelos and his World*, New York, 1966). Brading pointed the direction in his essay by discussing Vasconcelos's first major work, *Pythagoras. A Theory of Rhythm*, published in 1916, in which the author argued that the universe was essentially musical. He praised Pythagoras in contrast to Isaac Newton as he developed his musical theories and notions. In his philosophical statements, Vasconcelos repeated time and again his romantic views. President Obregón sent Vasconcelos to Rio de Janeiro as Mexico's representative to the centennial celebration of Brazilian independence. He took with him a statue of Cuauhtémoc, based on the monument in the traffic circle at Reforma and Insurgentes Avenues. He made clear in statements that he did not support Indianism that rejected the Spanish culture, but at the same time he saw in the image of Cuauhtémoc a call for a Cosmic Race that would represent a second era of independence in the hemisphere—an expression of his romantic notions (Vasconcelos, 1963, p. 172; Brading, 1984, pp. 72–3).

These romantic ideas, especially of the Mestizo, allowed Vasconcelos and other revolutionary officials, in the words of Guillermo Palacios, to "kidnap history and converted it into [their] history, a narrative used to solve the problems of … legitimacy…. History became an instrument of consolidation and an ideological guarantee of authenticity" (Palacios, 2010). In this way, it served in the construction of the popular imaginary of the revolutionary political administration, its society, and its culture. The goals of mestizaje made hostages of the indigenous peoples, who escaped this status only through the ethnic politics that followed the First National Congress of Indigenous Peoples in 1975, leading to the 1992 amendment to the national constitution that Mexico is a pluricultural nation with an indigenous base (Chorba, 2007).

The Mestizo, Vasconcelos's savior of Mexico and avatar of the Cosmic Race, represented the human expression of the solution that national intellectuals proposed to solve persistent national problems. The lines of romantic thought leading to Vasconcelos can

be traced to the Positivism beginning with Gabino Barrera, in his *Oración Cívica* (1867), through conclusions of Andrés Molina Enríquez in *Grandes Problems Nacionales* (1906), and continue to Antonio Caso and Vasconcelos (Lund, 2006, pp. 80–2). The Minister of Education's programs reflected both this intense romanticism and revolutionary fervor, joined, in the case of the minister himself, to an elitist predilection for high culture and artistic endeavor. Moreover, Vasconcelos should be credited in many ways as the father of mass culture that, with the rise of the popular media, quickly resulted in the new culture of comic books, movies, records, and radio. His ideals of mestizaje have remained imbedded in both Mexican and Latin American cultural practices, despite the rise of ethnic politics. This is especially the case in music, as made evident in the exhibit "A tres bandas: mestizaje, sincretismo e hibridacion en el espacio sonoro iberoamericano," in 2010 at the Museo de Antioquia, Medellin, Colombia (Catalogo, 2010).

How ironic that the long enduring and most widespread evidence of the Ministry of Education's programs under Vasconcelos's direction should be seen in the romantic images of the nation and its people on the lowly calendar, and heard on the radio in the mariachi music that has come to symbolize the nation. In a twist of fate, Vasconcelos's Cosmic Race found its most widely known and accepted expression in the Calendar Girl.

Notes

1 José Vasconcelos, *A Mexican Ulysses: An Autobiography*, trans. and abridged by W. Rex Crawford (Bloomington: Indiana University Press, 1963), p. 151.

2 José Carlos Mariátequi, *Siete Ensayos de interpretación de la realidad peruana* (Lima: Libros del Perú, 1928); Guzmán's *El águila y la Serpiente* (1925); Usigli, *El Gesticulador* (1938) as noted by Lund, *Impure Imagination*, pp. 113, 222, ft. 7, 224 n. 18.

3 Dawson cites Marjorie Becker, *Setting the Virgin on Fire* (Berkeley, 1995); Claudio Lomnitz-Adler, *Exits From the Labyrinth: Culture and Ideology in the Mexican National Space* (Berkeley, 1992); Arturo Warman, 'Todos santos y todos difuntos', De eso que llaman antropologia mexicana (Mexico, 1970), p. 36; Guillermo Bonfil, 'Del indigenismo de la revoluci6n a la antropologia critica', De eso que llaman antropologia mexicana (Mexico, I970), pp. 43–6; Margarita Nolasco Armas, 'La antropologia aplicada en Mexico y su destino final: el indigenismo', De eso que llaman *antropologia mexicana* (Mexico, I970); Florencia Mallon, *Peasant and Nation: The Making of Postcolonial Mexico and Peru* (Berkeley, 1995); Guillermo Palacios, 'Post- revolutionary Intellectuals, Rural Readings, and the Shaping of the "Peasant Problem" in Mexico: El Maestro Rural, 1932–1934,' *Journal of Latin American Studies*, 30, no. 2 (May, 1998).

4 *El Cine Mexperimental: 60 years of Avant-Garde Media Arts from Mexico* (México: Amalgama, 1998), p. 25, says Best Maugard was Vasconcelos's secretary, but this seems to be a misunderstanding of his position. The UNAM biographical dictionary says that from 1921 to 1924, he was the head of the Department of Artistic Education (Departamento de Educación Artística) of the SEP.

5 After 1932 he was a member of the Consejo de Bellas Artes, the Consejo de Asuntos Culturales de la Ciudad de México, of la Sociedad de Geografía y Estadística and of la Unión Mexicana de Directores Cinematográficos. In 1933, he represented the Departamento de Bellas Artes in the Consejo de Educación Primaria; from 1932 to 1935, he was the representative of Publicity Department of the Lotería Nacional de Beneficiencia Pública.

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Counter Revolutionary Programs: Social Catholicism and the Cristeros

DANIEL NEWCOMER

The Mexico City newspaper *El Universal* reported in early 1926 that Archbishop José Mora y del Río had defiantly instructed Catholics to refuse to obey the 1917 Mexican constitution. According to the article, Mora followed with a word of caution to the devout: any hesitation in their opposition to the nation's anticlerical laws would be considered "treason against our faith" (Greuning (1934) 275). Despite the fact that the Archbishop's proclamation had actually been made shortly after the adoption of the radically anticlerical constitution—in 1917—the article immediately heightened the already tense relationship between the national government and Catholics in 1926 (Redinger (2005) 8). Although Mexico's Catholic hierarchy hoped to avoid armed conflict, among many believers, Mora y del Río's "comments" represented a call to open rebellion. Within months, religious militants of widely varied social backgrounds, urban and rural, rose up against the federal government in the Cristero rebellion (1926–1929), a largely unplanned, violent, and intensely popular insurrection that helped to forge a new relationship between Catholics and the state in modern Mexico.

This insurgency mirrored many previous popular upheavals in Mexico's history, most notably the Catholic nationalist outpouring during the independence era (Meyer (2006) 289). Largely centered in the highlands of West-Central Mexico around Jalisco, Cristero-related uprisings nevertheless proved nearly national in scope. The conflict eventually cost more than 65,000 lives, witnessed the assassination of a president, and forced the intervention of foreign dignitaries. This prolonged and complicated episode represented the final overt military conflict between Church followers and the state in twentieth-century Mexico, but the rebellion neither originated nor resolved the country's difficult history of religious struggles. Rather, the conclusion of this unexpected, though predictable clash helped define the power of the nation's emerging single-party state. In the process, popular defiance of revolutionary programs aimed at secularizing national culture also demonstrated the indelible presence of the Catholic faith, in its myriad forms, as a fundamental aspect of Mexico's incipient post-revolutionary national identity.

1.   Overview of the Cristero Rebellion

Revolutionary president Plutarco Elías Calles (1924–1928) wasted little time in answering Mora y del Río's challenge to his government's authority. A seasoned anticlerical, Calles issued a statement explaining the urgency of the revolution's struggle against its "eternal enemy … the bad Mexican and foreign clergy" and, in the summer of 1926, followed with a decree known as the Calles Law that enforced the very constitutional provisions Catholics abhorred (Bailey (1974) 76). It shut down religious schools, expelled over one hundred foreign clerics and forced the remainder to register with the government. The decree further outlawed monastic orders, restricted the right of Catholic organizations to own property, and banned the public celebration of religious ceremonies. The enforcement of the constitution's anticlerical articles, which Calles' predecessor Alvaro Obregón (1920–1924) had only cautiously pursued, also targeted religious officials by denying their right to vote or even to appear in public in their clerical vestments (Loyola Díaz (1998) 35–7).

The Calles Law fractured Church–state relations and alienated even moderate believers, many of whom had supported select constitutional reforms. The revolutionary era had engendered many visions for national renovation and, during the 1920s, progressive Catholics had challenged the secular revolution by promoting their own transformative program known as "social Catholicism," an impulse that originally grew out of efforts to reform the Church in the nineteenth century (Ceballos Ramírez and Garza Rangel (2000) 10). Social Catholics supported land reforms and workers' rights and organized dozens of civic, labor, and rural associations offering a broad, spiritually based nationalist agenda that both paralleled and countered the official revolutionary project (Curley (2005) 304). Secular revolutionaries regarded such organizations as a threat, and violent conflicts among Catholics, government advocates, and anarchists—including a shootout between rival Mexico City labor unions on May 1, 1922—were common in the early 1920s. Social Catholicism certainly defied government authority, but its progressivism also threatened the position of conservative Church officials. As such, Mexico's episcopate never fully endorsed the movement, whose agenda was largely negotiated among reform clergy, lay organizations, and everyday Catholics (Hanson (1994) 324).

Both secular and Catholic nationalists—citing the high clergy's alleged loyalty to Rome rather than to Mexico—likewise sought to encourage Church reform (Butler (2009) 542). In 1925, schismatic Catholics formed the Mexican Catholic and Apostolic Church to challenge ecclesiastical power and thereby persuade skeptics to cooperate with revolutionary change in one form or another (Bailey (1974) 53). The "Mexican" church did little to dissuade loyalty to the original and, in the face of an ailing economy, Calles accused the latter of obstructing his reforms (Quirk (1973) 139). Calles considered anticlericalism a fundamental aspect of modernizing Mexican society, and hoped to complete the work begun by nineteenth-century liberals (Buchenau (2007) 115). He made little distinction between Catholic leaders and reformers, and viewed the Church as a monolith opposed to the revolution. Calles thus set out to finalize the revolutionary project by overcoming Catholicism, not just as an institution, but as an element of national culture. The Archbishop's comments gave Calles the opportunity to throw down his gauntlet, and Church officials responded in kind.

On July 31, 1926 the clergy declared its members "on strike" and refused even to say mass. Catholics nationwide suddenly found themselves deprived of their customary sacraments or the luxury of attending a simple religious service. They were especially

angered when the government countered the strike by banning even private worship (Meyer (1973a) 95). Many Catholics, citing the teachings of Thomas Aquinas, considered it their duty to combat these latest, most repressive efforts to purge their religion from national culture (Butler (2004) 179). An array of protests and disorganized armed uprisings soon erupted, especially around Jalisco and in rural West-Central Mexico. Clergy members were involved in the initial upheavals, but the violence was largely attributable to the actions of everyday Catholics acting spontaneously in defense of their faith. The rebellion caused tremendous controversy among Catholic authorities, whose opinions on militancy varied radically (Bailey (1974) 69). Although wary of the obvious moral conflict, neither the Church hierarchy in Mexico nor Papal authority in Rome immediately condemned the uprising, but attributed it to the frustration of lay organizations.

Mexico's City's most prominent lay organization, the National League for the Defense of Religious Liberty (NLDRL), formed in 1925 to combat the schismatic Church. It was the NLDRL more than the Church hierarchy, as was often assumed, that attempted to organize the sporadic popular rebellions into a cohesive national campaign. Its leaders pursued multiple strategies as the Cristero unfolded. While militant parties affiliated with it, especially Catholic Youth Action (ACJM), favored outright rebellion, NLDRL leaders pressured the government to overturn the constitution (Meyer (1973a) 61). The Liga, as it was known, arranged an economic boycott in the summer of 1926 aimed at crippling the administration's suspected weak hold on national life. Assuming that Catholics across the social spectrum would participate, NLDRL leaders advised believers to curtail spending so as to cripple the regime. While the boycott found some regional success, it failed because Catholic businessmen—never fully allied with the rebellion—saw no reason to continue a largely counter-productive tactic (Quirk (1973) 178).

The Liga thus turned its efforts to organizing a national military strategy. This undertaking proved nearly impossible because, by late 1926, independent Cristero bands were waging a formidable guerrilla war in dozens of localities (Bailey (1974) 118). Regional Cristero chieftains, who usually relied on sympathetic local organizations for support, knew the terrain in which they waged battle and tenuously controlled the countryside. The rebellion largely represented the varied agendas of these local guerrillas throughout; most insurgent leaders paid scant attention to NLDRL directives (Meyer (1973c) 242). Moreover, regional lay organizations like Guadalajara's powerful Popular Union (UP) competed with the Liga for leadership of the Cristero (Purnell (1999) 84). On the ground, local rebels often considered the NLDRL an impediment to their ability to wage battle. The Liga contributed to this by insisting that only ideologically "pure" Cristeros lead troops, and even denied certain rebel units much-needed arms and munitions (Butler (2004) 183). The rebellion consequently remained locally autonomous, disorganized, and marginally successful, illustrating that the Cristeros' motives were manifold: they reflected various regional, political, class, and religious issues. Local customs, community ties, and land tenure patterns were also at stake (Purnell (1999) 25).

The NLDRL persistently attempted to bring rebel groups under its central leadership regardless of their local aspirations. The Liga named the reluctant René Capistrán Garza, then ACJM president, head of Cristero forces in early 1927. With no formal military training, Capitstrán Garza was forced to head to the United States to procure funding from Catholics there (Bailey (1974) 102). Although the United States government was at the time involved in a dispute with Calles' administration over access to Mexican oil, and thus

made no efforts to curtail Capistrán Garza's activities, the Cristero leader still failed to produce significant monetary backing and was removed from his duties. Papal comments condemning Calles' policies only strengthened militants' obstinacy though, and by mid-1927 the rebellion had taken on the character of an unofficial Church-state conflict (Olivera de Bonfil (1966)).

On the face of it, the Cristero certainly suggested a struggle for political power between the traditional adversaries in Mexico's seemingly omnipresent institutional rivalry. On one side loomed the national government, its emergent single-party state, anticlerical constitution, and its revolutionary mythology. Its Jacobin, centralist leaders seemed intent on modernizing Mexico by purging it of the allegedly superstitious cult of Catholicism (Meyer (1973b) 194). Heirs of the enlightenment, revolutionary anticlericals' faith lie in a sort of material "religion" rooted in scientific reason, secularized institutions, and national sovereignty (Knight (2007) 29). They saw rural Cristeros as mystified, deeply ignorant, and superstitious obstacles to reform. Like their liberal predecessors, revolutionaries aspired to transform this population into progressive and productive citizens (Buchenau (2007) 126).

On the other side of this conflict stood the Church. Its supporters hailed from all social classes and decried the government's religious persecution. Conservative elites, who had supported their faith as the unifying element of national culture since the independence era, found the irreligious 1917 constitution intolerable (Boyer (2003) 158). The document essentially created—via Calles' enabling "legislation" in 1926—a modern royal patronage that forced the Church to operate under the authority of the state. It gave the government power to nationalize the Church's considerable property and allowed individual states to determine how many clerics could practice within their borders. Article 3, the most objectionable of the constitutional "guarantees" among Catholics, threatened to obliterate religious education and thereby secularize national society (Quirk (1973) 86). Thus, on one level, the Cristero represented the latest manifestation of a Church–state conflict that had emerged immediately after independence.

But the *Cristiada* undoubtedly transcended this institutional rivalry. It demonstrated the continued resonance and occasional fusion of competing national identities: one liberal, secular, and modern; the other conservative, Catholic, and traditional (Rubenstein (1998) 42). The crisis expressed historically and locally varied interpretations of Mexicanness (Cristeros hoped to defend their versions against the state's secular version) and of justice (Cristeros saw the liberal state as corrupt) (Meyer (1973c) 295). In this sense, a certain cohesion prevailed among Cristero factions. They saw themselves as fighting against the government for a common cause, reflecting a deep-rooted sense of religious community. Nevertheless, not all rural communities supported the Cristero. Even in religious hotbeds like Michoacán, neighboring villages exhibited divided loyalties and were often at odds among themselves (Butler (2004) 107). Despite Social Catholicism's nationalist project, an informal, popular sense of Catholic identity was more common among Mexicans (Boyer (2003) 166). Ordinary Cristeros could boast only of limited formal education, but many were aware of independence heroes and religious martyrs who had defended their faith, and by extension Mexico, against a range of prior threats (Meyer (2006) 188). Like Miguel Hidalgo's independence-era rebels, these Catholics—orthodox or otherwise—marched under the flag of the Virgin of Guadalupe. Their mantra, *"Viva cristo rey"* ("Long live Christ the king") recalled the long history of nationalist uprisings centered in popular spiritual devotion (Meyer

(1973c) 305). Revolutionary programs threatening to alter village political power and rural land tenure patterns further provoked these combatants (Purnell (1999) 135).

Cristero and federal forces demonstrated the depth of their antipathy on the battlefield, where they outdid one another in committing violent acts. The Mexico City press helped sway public sentiment in favor of the government by popularizing Catholic atrocities, especially where civilians were involved (Quirk (1973) 207). One episode featured the execution of 51 noncombatants on the orders of militant Father José Reyes Vega, whose troops derailed a Mexico City-bound train, herded injured passengers into a wooden boxcar and set it ablaze. In late 1927, militant Luis Segura Vilchis tried to blow-up president-elect Obregón's automobile; Vilchis was soon captured. Cristeros were also known to hang rival *agraristas*—peasant recipients of government land—and to stab prisoners so as to save ammunition. Such activity highlighted the obvious paradox of how religious folk could engage in, or even condone, such violence. But religion fused with militarism nonetheless: Cristeros reportedly raised their weapons in reverence of the Eucharist prior to battle. Many rebels prized martyrdom, and envisioned themselves as part of a universal struggle fought on the stage of Mexico's campo (Meyer (1973c) 297–302).

Federal troops certainly administered their own callous justice. Revolutionaries often branded innocent villagers "Cristeros" to confiscate or destroy their property. Like their counterparts, federals gruesomely dispatched their enemies and made public demonstrations of their corpses (Butler (2004) 172). Revolutionary soldiers ruthlessly tortured enemy combatants to gain information on the whereabouts of Cristeros and were known to machine-gun scores of poorly armed adversaries. After Segura Vilchis' attempt on Obregón, he and two suspected accomplices—one of them a Jesuit priest—were summarily executed and photos of their bullet-riddled bodies plastered on the front pages of national newspapers (Quirk (1973) 189). Federal officials, including Michoacán Governor Lázaro Cárdenas, offered amnesty to local Cristero warlords to give up the fight (Butler (2004) 183). In some cases rebels gave in and surrendered their cause; bribery was common when such efforts failed. Federal forces took the upper hand using such tactics in 1927 and seemed to have the rebellion largely controlled (Bailey (1974) 137).

Desperate to turn the tide, the NLDRL began recruiting officers with legitimate military training. Ex-federal soldier Enrique Gorostieta, himself anything but Catholic, produced victories for the better-organized Cristero troops under his command (Meyer (1973a) 199–204). His success derived from his military competence and from his willingness to acknowledge the authority of local leaders, who in turn enabled his tactics to flourish (Purnell (1999) 85). The presence of these irreligious ex-federales among the Cristeros offered a sardonic twist to the rebellion. Other rebel leaders benefited from their experience and began to generate more positive results in the field. Ironically, Father Vega's most important success in Jalisco—the April, 1928 Cristero victory at Tepatitlán—also resulted in his death. By late 1928 the improved rebel performance certainly loomed portentously as evidence that the conflict would not soon end (Bailey (1974) 231).

Efforts to resolve the crisis diplomatically routinely failed despite the work of Mexican bishops, who traveled to Rome and the United States to plea for intervention. While Calles was receptive to foreign mediation, the president would not amend his anticlerical laws (Buchenau (2007) 153). Many among the episcopate genuinely abhorred Cristero violence, but believed it justified in the face of official intransigence. For example,

Archbishops Pascual Díaz and Leopoldo Ruiz y Flores consistently worked to find an acceptable compromise. Their efforts during Calles' tenure got them exiled to the United States. Calles' dismissal of these emissaries hardened the attitude of combatants on both sides of the conflict and, at one time or another both Díaz and Ruiz y Flores condoned the violent rebellion (Bailey (1973) 90–93). The government meanwhile preferred to continue its military campaign to demonstrate its sovereignty and permanency. Traitorous federal officers further complicated diplomatic efforts in 1928, since they lengthened the war to profit from their mercenary activities.

The schism seemed irreversibly reinforced in July, 1928 when Cristero José de León Toral managed to assassinate president-elect Obregón at a Mexico City café. Just two weeks after the revolutionary hero and former president had been elected to a second term in office, his death threatened to further entrench the war in national life (Bailey (1974) 221). The sensational ensuing trial certainly captured the general public's imagination. Toral, who maintained his sole responsibility throughout, nevertheless led authorities to the Mexico City home of Abbess María Concepción Acevedo y la Llata, known popularly as Madre Conchita. The nun soon took center stage in the trial, as prosecutors manipulated gender stereotypes to portray her as a calculating, exotic cult leader who used her sexuality to persuade Toral to carry out the assassination (Heilman (2002) 58). Unable to convince the jury of her innocence, Madre Conchita was condemned to twenty years on Tres Marías Island, though her sentence was later commuted. Toral meanwhile faced death by firing squad.

United States Ambassador Dwight W. Morrow, an unlikely candidate, helped to achieve a peaceable resolution. Appointed in late 1927, Morrow met initial skepticism from many Mexicans because he was widely suspected to represent the agenda of American oil interests (Quirk (1973) 215). Unable to speak Spanish, Morrow earned the trust of Mexicans by demonstrating his admiration of national history, tradition, and folk culture. At one point, he arranged for Charles Lindbergh to fly the Spirit of St. Louis to Mexico City where it was met with an enthusiastic audience. His appeals to civic pride carefully avoided overtly favoring Church or state, and he generally ingratiated himself with citizens, though many Catholics remained wary of his association with the Calles administration. Morrow and Calles never reached a publicized agreement, but the ambassador's presence enabled a workable dialog to eventually emerge among militant parties (Bailey (1974) 307).

Calles' successor, Emilio Portes Gil, somewhat unexpectedly announced in May, 1929 that the clergy could renew its activities in Mexico so long as its members respected the law. This led to the drafting of a formal agreement known as the Arreglos that brought the difficult war to its end. In agreeing to abide by the law, the Catholic hierarchy granted a major concession to the hated revolution: namely, that its constitution was legitimate and, for the time being, permanent (Bailey (1974) 309). More than any other Church–state détente in the nation's history, the Arreglos cemented the government's superiority over the Church in political matters. Satisfied with this tremendous victory, and perhaps recognizing that the war had demonstrated that the state could not be overthrown militarily, Portes Gil's administration granted several allowances to the Church (Knight (2007) 39). The agreements helped to defuse Church–state tension by permitting religious education in Churches, though not in public schools. Moreover, Catholic priests attained the basic rights of other citizens. The Arreglos represented an agreement between the Church and state, not the Cristero rank and file, whose members were left to decide whether to continue their struggle or remain loyal to Church officials.

Despite the continuance of sporadic violence, most Cristeros saw the agreements as reason enough to abscond from the battlefield and return to their former lives (Butler (2004) 220). Religious turmoil undoubtedly continued throughout the 1930s and beyond, especially in rural areas, where government-sponsored secularization programs continued to agitate Catholics (Compare Becker (1995); and Bantjes (2000)). The dissolution of the Cristero forces ended the last truly popular, geographically widespread rebellion against the central government in the twentieth century. The insurgency also defiantly reiterated Catholicism as an inalienable component of Mexico's popular culture, demonstrating that the social, historical, and community bonds among Catholics of widely divergent orthodoxy would not soon be purged from national society (Meyer (2006) 188).

2.   Interpretations of the Cristero Rebellion

The Cristero rebellion has inspired an impressive, though comparatively small, body of scholarship that reflects the broader interpretive trends apparent in the historiography of modern Mexico. For historians writing at the time of the rebellion or during its immediate aftermath, the conflict posed a difficult paradox. That is, most of these authors viewed the recent events of the Mexican revolution as a profoundly popular peasant uprising in the name of land reform. They generally agreed that the revolution and its new government had, however erratically, initiated the political and social regeneration of Mexico. Thus, these scholars tended to look quite favorably on official reform, and had difficulty accepting that rural campesinos would rebel against the revolutionary state to defend the Church. Although they admitted that revolutionary anticlericalism often went too far, most of these "populist" scholars implicitly suggested that increased secularization, especially in the area of education, would benefit Mexico by enabling it to modernize.

By placing the Cristero within the familiar territory of a political and ideological rivalry between competing institutions of Church and state, the populists largely captured the view of the elite factions involved in the conflict itself. Scholars such as Ernest Greuning (1928), Frank Tannenbaum (1929; 1950), and Carleton Beals (1931) either down-played popular Catholicism or, reminiscent of their revolutionary contemporaries, dismissed Cristero militants as religious "fanatics" (Tannenbaum (1950) 133). Spiritual devotion, while undoubtedly a genuine sentiment among rural Mexicans, suggested to these scholars the continued resonance of pre-modern superstition roused by the landed oligarchy and Church officials as a way to oppose land redistribution and to avoid the loss of their political power. The implication was that authentic peasant rebel agraristas supported the revolution's modernizing agenda, while Cristero peasants represented a backward population that required transformation for the revolution to succeed (Greuning (1928) 277).

Populists regarded the rebellion as a proverbial bump in the road toward the revolution's inevitable completion, and dedicated comparatively scant space to the conflict in their writing. Although they distinguished between popular religion and Church policy, they tended to portray the rebellion as the result of a monolithic Church defending Catholicism's eroding political and social prestige in a modernizing society (Beals (1931) 290). Thus, if campesinos rose in defense of religion, it simply demonstrated the *necessity* of the revolutionary state and its anticlerical policies because, as Greuning wrote, the Church itself needed redemption (Greuning (1928) 286). Whatever their shortcomings, the populists did see Catholicism as a legitimate component of Mexico's national

identity, and these writers made admirable attempts at scholarly objectivity, which was not often the case among early treatments of the Cristero (Bantjes (2007) 231–233).

An important school of Cristero revisionism emerged during the late 1960s and early 1970s. It, too, reflected the broader historiographical trends among Mexicanists at the time, which in turn betrayed a deep sense of disillusionment with the revolution and its single-party state, by then called the Party of the Institutional Revolution (PRI). Whereas the populists had praised the emerging new government, despite its deficiencies, as representative of a democratic impulse associated with the popular revolution, revisionists cited the PRI's authoritarian policies, corruption, and closed political system as evidence that the revolution, in Stanley Ross' terms, was "dead" (1966). In their view, PRI policies had not authentically represented the agenda of the peasant revolutionaries who had rose up in arms in 1910, but that of a new generation of calculating politicos who sought to achieve power for themselves at the expense of popular sovereignty. Revisionists hoping to analyze the rise to power of these revolutionary elites thus revitalized interest in the Church–state conflict and in the Cristero rebellion.

David Bailey (1974) and Robert Quirk (1973), like their populist predecessors, viewed the Cristero as largely the result of a Church–state rivalry; that is, as a material struggle for political power between ideologically opposed institutions. Thus, they focused their analyses on political actors, but departed from traditional interpretations by portraying the revolutionary state as every bit the monolith as the Catholic Church. They saw no inherently justified populist cause here, and produced well-regarded monographs chronicling the activities of power-seeking elites on both sides of the conflict. For them, the Cristero rebellion helped to explain how the popular revolution had failed by demonstrating the enormous obstacle the Church had represented to it, as well as how the formative PRI had come to power by reigning in its Catholic opposition politically. These revisionists saw the Cristero as part of a continuum culminating in the PRI's inevitable domination of national politics, and emphasized the role of international relations in the outcome of events.

Revisionist works proved especially significant in their treatment of largely middle-class Catholic lay organizations, especially the Liga. Bailey, Quirk, and Alicia Olivera (1966) all focused considerable attention on this group and emphasized the fracture between the Church hierarchy, whose officials were reluctant to sanction a military uprising, and Catholic organizations whose members often strongly supported Cristero militancy. This emphasis helped to explain the urban Cristero phenomenon, and both Bailey and Quirk brought attention to the program of social Catholicism carried out by these organizations as a fundamental aspect in the long-term conflict. Social Catholicism had gained popularity in response to Pope Leo XIII's 1891 encyclical *Rerum Novarum*, subtitled *On Capital and Labor*, which gave official sanction to Catholic reform movements both within the Church and in broader society (Hanson (1994) 83). The document advised Catholics to address the concerns of impoverished working people by applying novel Church teachings. It effectively proposed a Catholic alternative to socialism, opposing the notion of class conflict by affirming the rights of private property (Curley (2000) 201).

More importantly for Catholics hoping to address the "social question," *Rerum Novarum* countered rogue capitalism by acknowledging the mutual obligations of workers and employers (Blancarte (1996) 21). Mexican Catholics responded enthusiastically to the document and, during the revolutionary epoch, countered secular revolutionary

movements, not only by promoting workers unions, but youth and women organizations that stressed practical and spiritual education in their efforts to alleviate Mexicans' material sufferings (Schell (2005) 295–297). Social Catholics also ventured into formal politics by supporting Francisco Madero's struggle against Porfirio Díaz and forming the short-lived Catholic Party that, among other things, advocated land reform based on private small and medium-sized holdings (O'Dogherty (2005) 104–150). Reformist clergy members helped form numerous lay organizations to advance this Catholic nationalist program, whose enthusiasts especially influenced the area of education, and in so doing often pursued goals similar to their government rivals (Schell (2003) 173–175).

Bailey, whose work built on the classic observations of Moisés González Navarro (1957), especially emphasized social Catholicism. Randal Hanson (1994), Roberto Blancarte (1996), and Manuel Ceballos Ramírez (2000; 2005), among others, have recently expanded his findings significantly. In their view, the social reform impetus represented, in effect, an alternative, counter-revolutionary Mexican revolution whose program for Catholic nationalism challenged the new government, which ultimately responded with its anticlerical campaigns leading to the Cristero conflict. This interpretation largely reflected the assertions of Catholic organizations themselves, whose members subsequently claimed to have greatly influenced all but the anticlerical reform provisions of the 1917 constitution (Newcomer (2004) 77). Moreover, social Catholicism apparently challenged the authority of conformist ecclesiastical officials, who effectively sought the Arreglos as a way to mute internal reform initiatives (Bailey (1974) 160). By recognizing the significance of social Catholicism, Bailey and Quirk helped to explain the long-term genesis of the conflict. But Cristeros themselves generally remained only a secondary consideration in these top-down studies; they appeared usually as reactionary elements manipulated by powerful elites.

Jean Meyer outdid other revisionists by inverting the traditional populist portrayal of the Mexican revolution altogether. His impressive *La cristiada* (3 vols., 1973) stands out even today as the most authoritative treatment of the Cristero rebellion. Like the revisionist historians, an inherent skepticism regarding PRI power influenced Meyer's work. He portrayed the revolutionary government as the instrument of centralist, radical anticlericals intent on driving Catholicism out of national society and establishing an authoritarian state. The regime's secularizing, modernization impulse represented a perilous threat to anyone opposed to its power. The Church hierarchy, in Meyer's view, was nevertheless well on its way toward negotiating a peaceable status quo with the government so as to retain whatever power it could when the unanticipated Cristero erupted in 1926.

To Meyer, the Cristero belonged in the same category as every other nationalist popular insurgency in Mexican history dating to the independence era. Meyer notably drew parallels between Cristero militants and Emiliano Zapata's peasant revolutionaries, all of whom he saw as being forged of the social ingredients inherent in all authentic Mexicans. Like the Zapatistas, the Cristeros were poor, rural peones, generally at odds with the interests of large landholders and the state, whose religion formed the center of their community life and cultural outlook. Like John Womack's classic treatment of Zapatismo (1968), Meyer saw the Cristero uprising as the popular defense of a traditional way of life imperiled by the encroachment of the centralist government seeking to eradicate local sovereignty. The Cristeros had become loyal to the clergy via social Catholicism, but they were not simply manipulated to rebellion by power-driven landholders or Church officials. Instead, they followed their own logic in their decisions to rebel, and ultimately

represented an eroding outpost of popular democratic defiance to authoritarianism. In sum, Meyer's Cristeros defended religion rather than the Church.

Meyer's research was the first to pay genuine attention to the Cristeros themselves. He focused on the varied regional outgrowths of the rebellion, the social distinctions among participants, and the religious motivations that inspired Catholics to take up arms against the government. In the process, he followed the work of his mentor Luis González y González (1968) in recovering the nuances of traditional life among the disenfranchised rural poor in post-revolutionary Mexico. Ironically, Church officials ultimately sold out the rebellion via the Arreglos, which represented to Meyer a cynical accommodation among elites. Although clearly partisan toward the Cristero cause, Meyer's work avoided the usual tendency to portray the conflict as simply a political rivalry between Church and state by introducing a third element into the analysis, the outlook of its participants. In this sense, his work anticipated recent post-revisionist interpretations of the Cristiada. Meyer's version essentially pitted the Mexican people and their religion against a corrupt, overarching state with which the Church was ultimately complicit. The government's victory effectively overcame the last truly popular revolution in Mexican history.

A post-revisionist school has recently challenged and expanded Meyer's explanations of the Cristero. Like Meyer, these scholars have largely interpreted the uprising as the result of a popular impulse over which the Catholic hierarchy exercised limited control. Post-revisionists have eschewed undertaking national studies in favor of researching the intricacies of the rebellion at the local level, enabling them to add important nuances to the broader-based earlier approaches and to challenge commonly held assumptions about the conflict. These authors have also generally attempted to employ a post-structuralist methodology in their analyses. In effect, whereas populists and revisionists interpreted the rebellion as resulting from conflict inherent among members of different social classes or institutions, post-revisionists have not assumed that membership in any objectively identifiable group determines one's actions. Instead, their analyses have privileged lived experience, cultural and political negotiation, and identity as motivations for the rebellion.

Like Meyer, many post-revisionists have portrayed the Cristero as the result of local peasant resistance to the revolutionary state's national agenda. They have not supposed, as Meyer did, that campesinos supported the Church en masse based on their presumed religious, ethnic, or class loyalties. Neither have they seen the Church and state as monoliths. Instead, post-revisionists have understood partisanship in this dispute as the result of negotiation over key material, cultural, and social issues such as access to land, party affiliation, and religious preference. Historical interaction among citizens proved integral in the creation of the emerging state, which was not simply imposed from outside, as Meyer contended, but developed locally from the ground up. Jennie Purnell, for instance, dealt with an important paradox of the conflict by questioning why some members of a presumed social class, rural campesinos, supported the Cristeros while others backed the state (1999). This approach in itself enabled her to refute structural analyses based on class, and she also took on Meyer's thesis by arguing that religious devotion, per se, proved a less critical factor than he claimed (Purnell (1999) 7–8). In Michoacán, where several post-revisionists have based their studies, Purnell found that local historical conditions prevailed; communities retaining land and grassroots religious organizations supported the Cristero while those that did not usually supported the government. Divergent political identities thus developed over time among campesinos according to circumstance.

Like Purnell, Matthew Butler sought to understand divergent partisanship among populations in varying regions of Michoacán, but his analysis placed local religious, rather than political, identities at the center of the dispute (2004). His study contended that communities rooted in orthodox Catholicism championed the Cristero, whereas agraristas usually emerged from villages in which traditional piety was less prevalent. Butler's nuanced analysis balanced a variety of historical, material, and cultural factors leading to the revolt, and provided an impressive survey of religious identities among agraristas—many of whom were Christians themselves—and Cristeros. Butler has also undertaken an important analysis of Catholic anticlericalism affiliated with the controversial Mexican Catholic and Apostolic Church (2009). Whereas the Church had been dismissed as an effort to construct a state-sanctioned Mexican episcopate, Butler concluded (much like scholarship on social Catholicism) that revolutionary anticlericalism and Catholic reformism were not mutually exclusive (Butler (2009) 557). He argued that a Biblically based anticlericalism bridged the ideological gap between revolutionaries and Catholics, which explained the eventual accommodation reached between Church and state in post-revolutionary Mexico.

Still others have examined identity as a category of analysis. Christopher Boyer, for example, questioned whether a campesino identity even existed among the rural population prior to the rebellion (2003). Noting that the term campesino was rarely employed before the Cristero, Boyer argued that rural Mexicans adopted this identity—which was originally exclusive to militant agrarian revolutionaries—as a way to mitigate the effects of divisive state-sponsored policies in the countryside. Thus, adaptation of the campesino identity allowed rural Mexicans to purge disagreeable aspects of officially sanctioned political culture, particularly anticlericalism, while still enabling communities to benefit from revolutionary reforms. Likewise, Keith Brewster studied the Sierra Norte de Puebla, a region whose indigenous population should have been primed for Cristero militancy, yet did not support the uprising (2003). He found that long-term local loyalties outweighed ties to national institutions there. Importantly, Brewster concluded that no single identity encompassed the interests of indigenous people in the Sierra. Thus, his analysis questioned the extent to which social identities could help explain Sierra history at all (Brewster (2003) 165). Each of these studies has added to the growing historiography on post-revolutionary state formation, which post-revisionists have not portrayed as a presupposed given or as an imposition, but as a negotiated process indebted to the contributions of widely diverse historical actors.

3. Conclusion

The Cristero rebellion challenged the authority of the revolutionary government and the Catholic Church in post-revolutionary Mexico. The conflict existed on many levels, featuring a struggle between Church and state, the defense of local religious and political identities, and the negotiation of Mexicans across social boundaries to define the cultural, spiritual, and material parameters of national life. The uprising delimited the government's secularization campaigns and demonstrated the extent to which various expressions of Catholicism characterized national society during the era. It also showed the extent to which reform Catholicism influenced the modernization impulse of the revolutionary epoch and suggested that the agendas of revolutionaries and Social Catholics were not mutually exclusive. Rather, they represented roughly parallel efforts

to improve Mexicans' material (and spiritual) conditions. The conflict between these rival nationalist projects illustrated how local and national actors contributed to the formation of the emerging state. Nevertheless, the depth of one's commitment to a given community's traditions, religious heritage or civic organizations often superceded one's loyalties to national institutions, and the Cristeros' assertion of their local devotion also helped to define Mexico's revolutionary national identity. Although the conflict represented the final large-scale popular uprising in twentieth-century Mexico, it did not resolve the nation's considerable religious difficulties, which reemerged shortly thereafter.

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The Apogee of Revolution, 1934–1946

SUSIE PORTER

The scholarship on the period 1934–1946 is integral to the larger field of Mexican historical studies; questions of central importance to historians have played out during this period. Scholars have debated whether the Revolution (1910) was indeed a revolution by examining agrarian and education reforms, initiated prior to 1934 but realized to their fullest during the 1934–1940 *sexenio* (six-year presidential term) of Lázaro Cárdenas del Río. Scholars have questioned the degree to which the revolution was a popular uprising in which *campesinos* and workers exerted influence on the government by examining political practices that, while they may have initiated during the 1920s, became gradually solidified with *cardenismo*. The tacit understanding, though it has not been fully explored, has been that those reforms skidded to a halt in 1940. In turn, the post-1940 period has often been characterized as the beginning of a new era. As journalist Carlos Denegri is purported to have said, in 1940 the revolution got down off its horse and into a Cadillac, suggesting the shift in emphasis from rural to urban culture, from men on horseback (connoting a particular exercise of political power) to consumers (and the political practices that supported consumption), and from the apogee of revolution to the beginning of the Mexican miracle. The historiography has echoed these trends and, as this essay will trace, focused on the period prior to 1940 by focusing on the countryside, and on the city after 1940. Such an approach has carried with it certain assumptions, which could produce exciting results if we question them.

Until recently, scholars have often taken the years from 1934 to 1946 as two separate historical moments. The first, 1934–1940, has been identified with *cardenismo*, the apogee of the revolution. Lázaro Cárdenas solidified political institutions and implemented many of the social, cultural, and economic programs associated with the revolution. Nevertheless, as Ilan Semo wrote, 1934 was "the last stop" of the Revolution. The second, 1940–1946, has been associated with an increasingly consolidated economic or political or both elite that utilized gains made during the previous period to exert increasing control over popular mobilization, curtail reforms, and promote economic growth. When scholars correlate historical periods with presidential terms, they

note that Lázaro Cárdenas traveled over some 18,000 miles, often on seldom-trod back roads, to listen to *campesino* petitions, and that he made great efforts to promote socialist education. Meanwhile, scholars make short-hand reference to Manuel Ávila Camacho as the "gentleman" president, and note his response to questions about the church, "I am a believer," (*soy creyente*) as indicative of government détente with the Cristeros, the groups who mobilized in defense of Catholic practices. Similar distinctions between the two presidential terms are made with regard to foreign relations. Whereas Cárdenas promoted the Revolution throughout Latin America, welcomed Spanish Republican refugees in late 1930s, and lead the expropriation of foreign-owned oil companies in 1938, Ávila Camacho encouraged foreign business investments in Mexico and signed mutual defense agreements with the United States.

That scholars have divided these years reflects in part the historical moment during which they wrote and the intellectual trends of the time. Scholars working during the 1970s and early 1980s could see both the progressive nature of the Revolution as well as its authoritarian turn. Many of these scholars identified the former trend with the period 1934–1940, and the 1940–1946 era with the latter. In a series of influential essays, Alan Knight (1994; 199X) laid out ways to think about different generations of scholarship and approaches to *cardenismo*. According to Knight, the "orthodox" generation celebrated the popular uprisings associated with the Revolution; "revisionists," saw in the national regime the capacity of the ascendant political elite to shape both state and society. The government's role in the massacre at Tlatelolco on October 2, 1968 only solidified scholarly skepticism regarding the political legitimacy of the government. Revisionist scholarship portrayed *cardenismo* as politically progressive, while establishing the basis for the government to channel the mobilization associated with the revolution. The president and his associates encouraged the formation of the National Peasant Confederation (CNC), the Confederation of Mexican Workers (CTM), and other organizations that they tied to the official party, the Partido de la Revolución Mexicana (PRM, 1938), that eventually became the Partido Revolucionario Institucional (PRI, 1946).

Within the political climate after 1968, scholars put forth competing notions of both the government and party. Many viewed history through a Marxist-tinted lens that understands the state's function not as mediator between different interests in society, but as promoter of capitalist development and capital accumulation. While some scholars concerned themselves with questions of intention (what did those in power seek to achieve), others focused on outcomes (what did the actions of those in power accomplish). Those scholars that saw the state as a promoter of capitalism tended to emphasize continuity in state formation from the pre- to the post-revolutionary period (Knight, Juggernaut, 76). Others took the position that *cardenismo* was radical in content, transformative of society, and marked a break with the past. Scholars who took this latter perspective that emphasized discontinuity worked with the assumption that the Revolution was a genuinely radical movement that mobilized substantial popular support. They argued, on the other hand, that the support was channeled into practices and institutions not necessarily revolutionary (or, "democratic," for those concerned with this political form). Resistance to the "radicalism" of *cardenismo*, these scholars argued, placed limits on the practical accomplishments that could be achieved, which led to more moderate politics by 1940, perhaps as early as 1938 in the wake of the oil expropriation. These early studies relied heavily on newspaper accounts, Congressional records, government documents, and participant memoires.

A decade later, historians built upon these largely institutional and political histories and reconceptualized political history to include culture. Scholars asked how culture, be it religious faith, membership in an indigenous community, or educational culture, shape the relationships between the regime (the government and the party) and individuals or groups? The scholarship of the 1990s also characterized, perhaps unfairly, the previous generation as Mexico City-centered and drew on the growing interest in regional studies to ask how actors, informed by sub-national cultures, shaped official, national culture. This scholarship drew on regional archives, which researchers often found in varying stages of preservation and organization. Once armed with notes from files of dusty documents, scholars sought, in their analysis, to move away from antinomies of constraint and consensus to focus on cultural forms of rule. In the hands of these scholars, culture was associated more with those who were governed than with those who governed; nevertheless, that culture was, many scholars argued, produced in relation to dominant culture through a "dialectical cultural struggle." (Nugent & Alonso, 1994)

Appearing on the cover of a special issue of the *Hispanic American Historical Review* (79:2), a photograph of *lucha libre* wrestlers characterized the tussle over the meaning and value of cultural history to the field. Discussion ensued with regard to methods, definitions, and rigor, with most practitioners drawing from anthropology, post-colonial, and post-structural studies. Historians spilled a good amount of ink debating definitions of culture, by and large taking culture not as epiphenomenal, but rather as integral to the unfolding of social action; as integral to conditions and relations of production, political rule, and social interaction. For some, the benefits of this generation of scholarship had more to do with how new perspectives contributed to the continued "empirical harvest," rather than substantive engagement with epistemological discussions. The more skeptical saw cultural history as a product of a professional community of scholars who shared works they consider relevant to cite.

Much of the scholarship associated with the new cultural history was located within the field of rural and peasant studies. (Vaughan, 1997; Beezley, 2007) Indeed, to date a similar vein of scholarship has not, in as robust a fashion, emerged for urban studies. The three areas that have received the most scholarly attention have been: agrarian reform, education, and secular-religious conflict. With regard to the first, scholars built upon the institutional histories of the 1980s that identified the central programs, institutions, and political players involved in agrarian reform. And whereas earlier studies disputed the relative success of the redistribution of land and the proliferation of the *ejido*, the new cultural history looked to how the *ejido* fit within the campaign of populist revolutionary nationalism that served to legitimate the state. Thus, while the government indeed distributed land, officials also drew selectively from history to highlight the indigenous roots of the *ejido* and to co-opt popular struggles for land and resources. Local actors too gave meaning to institutions (such as the ejido), the land, and political identities (such as *campesino*). (Nugent and Alonso, 1994; Boyer, 2003) People with a wide variety of working relationships to the land mobilized around the identity of *campesino* because government officials recognized this group and provided it with resources including land and political rights. When *cardenistas* burned the image of La Purísima (a manifestation of the Virgin Mary), women took from the Catholic language of purity, damnation, and loss, to express their reaction to the burning and to *cardenista* land reform and educational policies (Becker, 1995).

President Cárdenas's implementation of "socialist" education has been examined by scholars who have highlighted education as a mechanism of state building, key to the

formation of citizens, and schooling as a zone of cultural encounter. Socialist education represented a significant departure from prior models of schooling and encouraged a skills-based education, used the rhetoric of class conflict, and celebrated collectivism. Writing on the 1920s, Patience Schell notes the similarities between Catholic and secular education, and the reliance of the revolutionary government on Catholic institutions to educate the populace; nevertheless, many Catholics took socialist education, and its secular emphasis, as a direct threat. (Schell, 2003) While some scholars saw the state as imposing its educational model, others have highlighted negotiation. Mary Kay Vaughan found that both models (imposition/resistance) and negotiation were useful in understanding educational encounters. Scholars' interests included not only the history of institutions and government decrees, but the social history of schooling as well. (Elsie Rockwell, 2007) Regional and comparative studies like that of Vaughan on Sonora and Puebla show how local practices, traditions, and institutions as well local histories, profoundly shaped educational encounters. Vaughan found that cacique politics countered the democratic practices engaged in by the Ministry of Education and its employees. (Vaughan, 1997) Indeed access to education gave some individuals in indigenous communities the very tools to garner resources and engage in cacique political practices. (Lewis, 2005) A recent study has raised the suggestion that while the ideological construction of the *maestro rural* in post-revolutionary Guerrero was as a reformist opponent of caciques, teachers themselves also engaged in "cacical" practices. (Gillingham, 2006) Attention to teachers as workers engaged in union politics during this time would greatly enrich this area of the nation's history.

Cárdenas' relationship with Catholic Mexico, often characterized by conflict over education, land, and culture, makes up the third significant area of scholarship. The Revolution's leaders drew on 19th century Liberal, secularizing, trends in religious practice, political philosophy, and institution building that took on new meaning. While the Cárdenas administration took a softer approach to Catholics than his predecessor Plutarco Elías Calles, he drew on those secularizing trends when implementing "socialist" educational reform. During the 1920s and 1930s the civically engaged religious citizens consisted of at least two generations, one linked to an old oligarchy that was more conservative, and the second a middle-class constituency. This latter generation emerged from among students and intellectuals, and became powerful in the Bajío. This younger generation found expression in various organizations, including the Unión Nacional Sinarquista (UNS). Founded in 1937 in León, Guanajuato, the UNS grew out of clandestine organizations, but was itself an openly engaged social movement that fought for civic and religious liberties, largely defined, Jean Meyer shows, against the Cárdenas government. The movement drew on Social Catholicism and intense nationalism that looked to the Hispanic more than indigenous past, and recruited from groups also claimed by *cardenistas*: workers, peasants, Indians. (Meyer, 2006; Newcomer, 2006)

The growing scholarship on Catholic culture and politics deepens our understanding that civically engaged Catholics were not a minority movement. Indeed, recent work has pointed to the intellectual thought (Sherman, 1997), cultural practices (Rubenstein, 1998), and political organizations (Torres Septien, 2009; Mizrahi, 2003) that gave voice to widely-held critiques of the revolution. Interest in conservative politics has increased within the context of the election of a PAN candidate to the presidency in 2000 and 2006. Formed in the wake of the Cristero rebellion (1926–1929), Acción Católica Mexicana (ACM) worked to sustain, strengthen, and extend Catholic culture as integral to every aspect of life, including politics and education. Manuel Gómez Morín, co-founder

of PAN, decried the model of capitalist development pursued by the revolutionary government, lamented the demise of the countryside and the mis-use of the land formed into *ejidos*, and celebrated Hispanic and imperial past. (Jaffray, Osowski, and Porter, 2009) In León, Guanajuato local actors came together despite such differences because of their shared interests in development and modernization. (Newcomer, 2006)

While in 1997 Eric Van Young described the "new cultural history" as political history sensitive to culture, rather than cultural history *per se*, the scholarship produced in the first decade of the 21st century has attempted to pin down what precisely constitutes culture and how it relates to other aspects of human experience; it has also focused on new facets of culture—the production, consumption, and circulation of film, magazines, mural art, radio, and comic books. Alongside a proliferation of cultural histories, scholars have written increasingly nuanced political histories that examine *caciquismo*, popular mobilization, and citizenship. By identifying these trends in the historiography, I seek to highlight certain issues, and by no means suggest that these trends are mutually exclusive, or even the only way of considering the field. It is worth noting, however, that these two threads of scholarship do not, for the most part, engage each other, though individuals publish in collections of both sorts of scholarship.

Caciquismo, which can be compared with, though not equated to, boss politics, had been integral to earlier generations of political history, regional studies, and even the new cultural history of rural Mexico (Falcón, 1984; Falcón, 1994). Caciques function within a clientelist system wherein actors are linked in bonds of reciprocity and patronage that, in hierarchical fashion often reach from the level of the *municipio*, through the state, regional, and national exercise of power. Engagement in patronage networks has been the means by which citizens have gained access to (or provided access to) public resources such as public works (roads, clinics, schools), land, cash, jobs, and political power. Such relationships were examined in the scholarship produced in Mexico in the 1980s, as they related to the particular importance of cacique-led mobilization of the vote, and in mediating workers relationship to the state (strikes, etc), and access to *ejido* lands. Many considered *caciquismo* as an impediment to the modernization of Mexico. (Knight, 30–32)

That *caciquismo* built upon control of resources—political, economic, bureacratic, and sometimes imagined (DeVries, 2005) regional variations of resources—gave shape to unique local political practices. Change over time in the balance of resources also shaped the success of a given cacique. (Lewis, 2005) Conversely, *caciquismo* has also altered regional resources, co-opting local, indigenous community authorities on behalf of the official party, and allowing for the penetration of official institutions into community life. Such has been the case in Chiapas, where traditional system of cargos at times facilitated the practice of *enganche* (debt peonage). Exploited indigenous labor served to enrich large landed interests tied to commercial agriculture and industries of extraction of natural resources. (Rus, 1994; París Pombo, 2009) The histories of individual *cacicazgos* do not always follow periodization frameworks based on presidential term; nevertheless, Alan Knight finds the 1940s a turning point in *caciquismo* characterized by a "transition from violent to pacific external threats…the decline of military and *agrarista* caciques and the rise of more civilian, entrepreneurial bosses; the growth in federal government authority and, later, federal spending." (Knight, 2005, 46)

While previous generations of scholarship on *caciquismo* identified men as powerbrokers, María Teresa Fernández Aceves and Heather Folwer-Salamini identify women's role in cacique politics, and in so doing contribute to how we understand the breadth and depth of this political culture—and, indeed, what constitutes political

culture. Fowler Salamini, in her study of coffee sorters in Veracruz, argues that in many ways women's exercise of cacical power did not differ from that of men. If the power of a cacique could be authoritarian and paternalist, women were less likely to actually use violence, and more likely to use the threat of violence as well as manipulation. Female labor leaders manipulated political power within a field of norms defined by coffee sorters' religious practices, gender norms, and social ties rooted in their work culture.

While women exercised power in ways that often differed from men, they did not all exercise power the same way. While one female labor leader wore men's pants and shoes, spoke coarsely, and carried a gun, another relied on a style of persuasion more in accordance with norms of femininity. Women in male-dominated labor organizations in Guadalajara also appropriated and refashioned official gendered discourses of Church and State in ways that gave them power, even in the absence of women's full right to vote (until 1953). (Fernandez Aceves, 2005) And, while some women drew on nineteenth-century anticlerical liberalism and growing opportunities for women's professional training, others exercised power within the rich Catholic culture of, for example, Guadalajara, the rise of the labor movement, and the incipient feminist movement. In Jalisco and in Veracruz, female leaders often married men active in labor organizing and politics, which tied the women to male power brokers. Fernandez-Aceves found that women did not enter into positions of political authority under the same circumstances as men because, according to the author, the public world of politics was considered a man's world. Women did, on the other hand, organize in cross-class alliances of teachers and workers.

The clientelism associated with cacique politics informs the exercise of citizenship. Jocelyn Olcott argues that citizenship in post-revolutionary Mexico was based on "liberal invocations of suffrage, traditional expectations of patronage, and revolutionary commitments to popular mobilization." The performance of revolutionary citizenship, she continues, derived from three traditionally masculine activities—military service, civic engagement, and men's work. Women, barred from military service, and required to "pass" as masculine in their labor, according to Olcott, were disadvantaged in their exercise of citizenship, despite their civic engagement. Women's status with regard to the military and labor remain unexplored in her book. Women did indeed participate in military mobilization, though the government denied recognition of women for their contributions. (Rocha, 2007) A full history of women's work during the 1930s and 1940s remains to be undertaken, but the studies that exist call into question the claim that women had to "pass" as masculine. (Goldsmith Connelly, 2009; Porter, 2003) Olcott shows women put aside objectives, expressed in the 1916 Feminist Congress in Yucatán, for sex education, birth control, and recognition of reproductive labor, in favor of *patria* and revolution, goals Olcott classifies as masculine. By 1940 women's organizations had become so complicit with clientelist networks tied to the government that they could not effectively push for suffrage; women activists compromised autonomy for the sake of voice. Thus, Olcott adopts a traditional periodization, grounded in studies that have emphasized the co-optive forces of government and party.

Further understanding of the changing political fortunes of women will need to attend to the sorts of cultural issues that shaped the context within which women organized to demand the vote. Cárdenas justified women's suffrage with equality-based arguments; it was not until women utilized difference-based arguments that women earned the vote in 1953. (Cano, 1999; Buck, 2007; Sanders, 2007; Lau, 2009)

One approach to citizenship that delves into culture draws on Pierre Nora's "les lieux de memoire," especially the idea of "national pedagogies" as practices that utilize the

past in order to direct individuals to a particular future. (Vaughan, 1997; Vaughan & Lewis, 2006, p. 6) The various essays in *The Eagle and the Virgin* examine the aesthetics of nation building in the popular arts, music, painting, and architecture; "utopian" state projects of behavioral transformation in health, anticlericalism, and education; the role of mass communications (roads, cinema, radio) in nation formation; and national identity formation at the regional level and among distinct groups (middle-class women, political Catholics, industrial workers, for example). Whereas early scholarship organized discussions of culture around the concept of Mexicanness (*mexicanidad* or *lo mexicano*), a phrase with which historical actors associated a web of traditions, values, and practices (O'Malley, 1986), often with the intent of drawing boundaries between those with or against the ruling party that claimed to represent the Revolution, this recent scholarship has jettisoned both the more institutional histories of culture (state-sponsored muralist movement) and the implied assumption that there is a singular "national" culture. Nevertheless, the concept of nation, albeit de-centered, remains relevant in this scholarship, and the essays explore national identity, memory, and utopia.

The texture and richness of the layers of history appear in much of the recent scholarship. National identity and memory construction were rooted in different locations across the republic and in its past. So, for example, for many female teachers identity was rooted in 19th century Liberalism, Benito Juárez, and filtered through the anarchism associated with revolutionary upheaval. Similar reappraisals of the layers of history are offered in studies on the inscription of narratives of the past in physical space. Government and the private sector built roads, renamed streets, built monuments, sponsored the painting of public buildings, and filled the airways in ways that layered the colonial, Liberal, anti-clerical, Catholic, and modernizing nation. (Torres Septien, 2009; Olsen, 2006; Bantjes, 2006; Waters, 2006) Secularizing and Catholic impulses played an important role in national identity formation. Attention to layers of history alters our conceptions of the nature of the Revolution and challenges stubborn forms of periodization rooted in presidential terms, which codify hackneyed assumptions that the Revolution of 1910 marked a rupture with the past.

Just as formal, legal citizenship has a history of exclusion, so too social citizenship implies acts of inclusion and exclusion. That exclusion has taken the form of political marginalization, sometimes based on religious affiliation, geographical location, and/or gender. (Cardenas & Guerra, 2009) Indigenous Mexicans were also marginalized in their exercise of citizenship. That marginalization still left room for negotiation that took place within prevailing rhetoric's regarding indigeneity. During the early 1930s government officials adopted the perspective of anthropologist Manuel Gamio, who argued for assimilation as the way to integrate indigenous Mexicans into the mainstream (and that this was indeed the goal). The failure of programs based on this premise, boarding schools for example, resulted in a change in government programs. Cardenas initially followed Moisés Sáenz's plurinationalism, a philosophy that shaped the Department of Indigenous Affairs, but then reverted back to an assimilationist approach. Government officials, social scientists, and indigenous leaders negotiated the place of native peoples within this changing context of rhetorics with regard to ethnicity and citizenship. (Dawson, 2004) Indigenous leaders mediated between state representatives and indigenous communities made demands based in the language of citizenship. Despite the capacity to make demands, many indigenous communities remained marginalized from federal initiatives and resources. Once again, the scholars claim, without fully exploring, that the course of history stopped when Ávila Camacho took the presidency in 1940, and

purged government offices of indigenistas and leftist bureaucrats, and reconfigured or cancelled projects. (Dawson, 2004)

Exclusion and marginalization from official reforms and narratives has not always been cause for lament. Recent scholarship has explored the sometimes significant disjuncture between individual constructions of memory and official narratives, with the result of unearthing the richness of the era of revolution. The rejection of the pro-Cardenas labor stance by some sectors of organized labor is but one example. (Snodgrass, 2006) And, it shaped the way women told their tales of professional and political work after decades had passed. (Fernandez Aceves, 2006) On the silver screen, the language of melodrama provided multiple, contradictory languages of *mexicanidad* that spoke to contradictions posed by urbanization and modernization. (Hershfield, 2006) This latter example raises the question of how did individuals process and take up such languages of representation? How did representation relate to subject formation? Future studies exploring these questions will need to take into account the growing literature on representation in the national cinema. In addition, it calls for a great deal more research into subject formation, some of which will come from a forthcoming ethnography by Mary Kay Vaughan. To pose the question as a distinction between national narrative and individual memory is to turn away from the approach introduced by literary studies that would argue that there are scripts, but no individuals. Perhaps the question could be posed not as one of the relationship between individuals and national narratives, but as one of genre and archive.

Post 1940 Cultural History; the State; and the Private Sector

Scholarship on the 1940–1946 *sexenio* has until recently been more modest in volume than that for the prior sexenio, though no less provocative intellectually. It echoes trends for the period 1934–1940, namely cultural studies, which for the period after 1940 have focused first on mass consumer culture and second on political histories of popular mobilization that, with some exception, have appeared mostly in Spanish, and which seek to counter official political position. Historians who take an interest in the 1940–46 *sexenio* often do so to understand subsequent historical moments and, more often than not, do so with an eye to the underbelly of the Mexican miracle. This episode dates roughly from 1940–1968, as a period of unprecedented economic growth (average rate of 6 per cent). The *defacto* protectionism of World War II (Mexico entered into the war in May, 1942) contributed to this economic growth, but, above all, it was government policies that by and large supported industrial and commercial expansion and increased commerce with the United States. (Niblo, 1998; 1999) The flow of ever-greater numbers of Mexicans to the United States served as a release valve to the inequities of growth during this time. Discontent with that inequity was contained, scholars have claimed, by the P*ax PRIista*, a purported political peace brought by means of the institutionalization of party politics dominated by the official party, the PRI. Historians of culture emphasize the commercial expansion and explore the growing role of consumer culture in shaping daily life.

Cultural histories of the period after 1940 argue that "popular culture [w]as the essential motor of transformation and of permanence" and examine the production, circulation, and consumption of culture. The introduction to one collection of essays claimed that the 1940s literature was different from that for prior periods because it focused on private industry. The extensive body of scholarship on hacienda production would, of course, indicate a significant interest in private industry, though the study of

consumer culture in rural regions is a largely unexplored field. Regardless of the era, both events in Los Pinos (the office and once-official residence of the President) and Congress, along with private industry, contribute to cultural production. The industries of tourism, print media, film, radio, and others relied on government support. (Saragoza, 2001; Mraz, 2003; Berger, 2006) The company Maseca spent heavily on advertising and benefited from government subsidies to promote purchase of *masa harina*; the government provided support to the tourist industry, which in turn reinforced the language of *mexicanidad* and modernity that accrued ideological support to the government; and, government subsidies and, to a lesser extent, commercial advertising, supported photo-journalism and illustrated magazines which, in turn, supported *presidencialismo* (the celebration of the man in the presidency and his authoritarian power). The construction of *presidencialismo* as a form of political power within visual culture echoed traditional, hierarchical gender norms that celebrated *pater familias.*

The circulation of culture, as represented in prior generations of scholarship, appeared as murals painted on the walls of public buildings, or was published in novels that celebrated the countryside; more recent scholarship takes the reader into the streets of the urban nation, or allows us to overhear gossip exchanged between neighbors. And whereas scholarship on indigenismo of the 1930s has focused on schooling and intellectual trends, for the period of the 1940s scholars have tended to examine representation of indigenous Mexicans in cultural forms such as media. Films like *María Candelaria* (1943) presented indigenous culture as unassimilable; photojournalism, which drew on Porfirian traditions of representation of indigenous peoples, exposes the importance of Indians (or their representation) to presidentialism during the 1940s. (Mraz, 2001) While histories of popular culture have revealed the importance of representation of indigenous culture, the relationship of individuals, self-identified as indigenous or not, to such representations remain histories to be explored. How did "Indians" participate as producers and consumers of folklore; how did representation shape their lives as workers and citizens?

Scholarly reappraisals of culture have challenged certain categories of thought such as "tradition" and "modernity" as dichotomous and have shown them to be mutually dependent. By the 1940s, material wealth, abundance, and an optimistic outlook on the nation's economic and industrial growth defined a nation that proudly celebrated its diverse heritage. Mexican and American government officials and business executives drew on the ethnic diversity, and nationalism and revolutionary traditions (in part founded on idealizations of indigenous culture), for commercial and diplomatic purposes, while implicitly suggesting that the country ought to welcome foreign investments and business practices in order to become competitive in a global setting. Such was the case in the advertising and film industries. (Moreno, 2003; Fein, 2001) The interplay of tradition and modernity also played out in the lives of everyday people as consumers of culture. Anne Rubenstein, in looking at the life and death of film celebrity Pedro Infante, finds that the way Infante's death played out as a public display precluded being able to speak of "tradition" and "modernity" in ways that made sense to his fans. President Manuel Ávila Camacho sought to distinguish himself from the "macho" identity, in a way that suggested that the Revolution was over, and a modern, orderly government— still heir to the legitimacy of the Revolution—was under his "modern" command. By the 1950s, United States citizens, as tourists, hippies, and beatniks, were attracted to the markers of the Mexican middle class as "modern," "cosmopolitan," and open to foreign investment and influence; and, at the same time, they were attracted to Mexico for its difference, as "exotic," or "folkloric." (Zolov, 2001)

The scholarship for the period after 1940 has been particularly attentive to the relationship between Mexico and the United Stated as the context for a range of cultural, economic, business, and artistic practices. (That scholarship has paid little attention to the relationship of Mexico to other nations, European, Latin American, or otherwise.) In addition to the obvious ways that the aforementioned conceptions of tradition and modernity played out, scholars' interests have ranged from the role of Mexicans who fought in World War II (Plasencia de la Parra, 2003) to representation of war heroes in Mexican cinematic production. The role of migration in such exchanges, that is, not just the movement of capital and cultural production, but the movement of people as well, remains open to many lines of inquiry. Richard Griswold del Castillo revisits the 1943 zoot suit riots in Los Angeles, California and the reaction of Mexicans and Latin Americans to race relations and racism in the United States. Taking into consideration the context of wartime alliance against Axis power, Griswold del Castillo shows that for upper-class educated Mexican elite the *pachucos* were an embarrassment.

Histories of mass consumer culture remain as yet fragments, without a sustained, integrated consideration of life cycle, the role of other institutions and practices, and of generational change. So, while we know that electrical wires extended their reach into villages, we know less about how urbanized forms of culture, such as radio shows and mariachi music, were received. What did this mean to inhabitants in those villages? And, what were the circumstances of the lives of those villagers? Were they migrants to Mexican cities or across the United States border? Where do these cultural activities take place, in public spaces such as cinemas; in spaces where the public convene, but which are in fact controlled by private interests; is it possible to know how these practices entered into private spaces such as the home? Promising work has been done in the area of audience response theory and ethnography that explore the reception of media representation. (Fein, 2001) In work in progress, Mary Kay Vaughan explores what representation of celebrities such as Dolores de Rio and María Félix has meant for the subject formation of a young male artist and his conceptions of self, gendered power dynamics, and sexuality. Such histories allow us to better understand how fragments of cultural expression figured into the mosaic of daily life and life cycles, and simultaneously provide insight into the workings of both electrical and political power in Mexico.

While some scholars have moved away from state-centered studies, more work on the role of the state remains needed. Indeed, there are crucial ways that government institutions have lent to economic and social processes that have been woefully under-explored. Nichole Sanders's work on the welfare state suggests important new directions. The government established the Ministry of Public Assistance (Secretaría de Asistencia Pública—SAP) in 1937, that was merged with the Mexico City Department of Health in 1943 to create the Ministry of Health and Welfare (Secretaría de Salubridad y Asistencia, SSA). Political stability during this period came in part because of state-labor relations (Middlebrook, 1995). Sanders explores the ways the state supplied social programs such as IMSS, housing, and food that contributed to social stability. (Sanders, forthcoming) Organized labor benefited from an agreement that was characteristic of the Manuel Ávila Camacho administration's cross-class coalition, originally designed by Cárdenas. Furthermore, the expansion of state welfare programs opened opportunity in the professions to women. (Sanders, 2008) Both the benefits proffered to labor, and to women entering into middle-class profession, beg the question of how such public programs contributed to social mobility. Generations attended schools, took jobs, gained access to

health benefits, and perhaps benefited from the subsidy programs of the 1940s. Study of social mobility of sectors or classes would also need to pay attention to households.

A fuller understanding of class and social mobility needs to be sensitive to the dynamics of household reproduction, which often relies on both private and public resources. We now know more about state reform of nutritional practices and related government policy that resulted in, for example, public dining halls, and how food practices gave meaning to identity. (Aguilar Rodíguez, 2007) What did this mean inside the home, for the reproduction of the household, the dynamics of labor, and class formation? The work done by Mary Francoise for the 18th century needs to be done for the 20th century. (Francoise, 2006)

Taking up the tone of oppositional writers, and to good effect, Tanalís Padilla rejects the focus on culture and places the state, institutions, and mechanisms of imposition at the center of her analysis. In her history of the Jaramillista movement in Morelos, Padilla shows how government repression and popular resistance engaged in an "escalating dialogue." (Padilla, 2009, 14) Jaramillistas, seeking realization of the Constitution of 1917, encountered state unresponsiveness and increasing repression. Frustrated by the lack of viable avenues within political system, by 1943 Jaramillo and 100 others went underground. Access to water and credit, and the transportation of sugar cane to the mill, all became dependent upon support for the PRI. And low prices for sugar not only made mill owners wealthy, but allowed for urban centers where a growing number of Mexicans sipped the cola advertised in magazines, and served in restaurants and corner shops. President Ávila Camacho implemented changes in land laws that encouraged the sale of *ejido* lands to Mexican and United States developers tied to the tourist, housing, and commercial agricultural industries. Ávila Camacho also eliminated "socialist" education, replaced the rhetoric of class struggle for calls for "unity at all costs," and refined the appearance of a natural concordance between the PRI, the constitution, the nation, and the government.

There is need for more studies of the post-1940 period in many regards: of labor of all kinds, ranging from work in the streets to inside factory walls, inside offices and behind counters; and on the relationship between state institutions and reforms. To what degree was 1934–1946 the apogee of revolution? More can be done to understand the development of commercial interests as they tightened the ties between rural and urban Mexico, both in terms of cultural representations in film, comics, and photojournalism, but also the transfer of wealth, and population, from rural to urban Mexico. The field needs the social histories and ethnographies that would contextualize much of the work that has been done to date. Those social histories would investigate changing behavioral patterns such as paternalism. One recent example is that of Mary Connelly Goldsmith on Tampico domestic workers, 1929–1944. Workers, in private homes, laundries, and hotels formed unions but they failed in their goals because the union efforts did not break the paternalist hold of employers over their employees. The state inserted itself in these relations between union and employer, and those representatives of the state's action were informed by cultural understandings of domestic work that reinforced the prerogatives of employers. Thus while the state granted to domestic workers *de jure* status as workers, those same workers experienced a *de facto* marginalization from the rights of other sectors of organized labor. Goldsmith's attention to the way cultural legacies of paternalism shaped new relations of production demonstrate how culture can function; how it can be challenged, and then be re-inscribed in modified form, as integral to relations of power in daily life. (Goldsmith, 2009)

And while there have been good reasons for evaluating Mexican history along the periodization defined by presidential terms, future studies will benefit from questioning this divide, and, indeed, from discussing methods, and perhaps more generally, the value of periodization. So for example, while much of the recent cultural histories date to the post-1940 era, the roots of mass, commercial cultural production—film, print journalism, comic books, and wrestling (not to mention the arrival of Piggly Wiggly grocery stores and Florsheim shoes to Mexico City, as noted by Salvador Novo)—trace back to the 1930s, and future research would do well to take this under consideration. Many scholars of cultural history seem not to put inordinate stock in questions of periodization. Perhaps this irreverence towards periodization is useful. Perhaps questions of periodization are warmed-up leftovers from a more empirical moment in historical studies, and their waning suggests the difficulty in putting dates to processes such as norms of masculinity or a turn in representation of bodies in post-revolutionary culture. However, if we cede that periodization is of relatively little value, then the practice of cultural historians of dating cultural phenomenon by pin pointing, say, the appearance of a postage stamp or a funeral seems misplaced and arbitrary. If periodization served as a means of legitimization for historians in the past, and more recently the necessary footnote citing Antonio Gramsci, Pierre Bourdieu, Sheldon Wolin, or a page full of other non-Mexican scholars, what would profitably legitimate future historical studies? Perhaps a productive approach would be to follow Elsie Rockewell, who distinguishes between different layers of periodization of political battles, educational encounters, and cultural forms. This sort of attention to different levels of movement of historical change might address concerns raised by scholars like William Beezley who have pointed out the implications of terms of loose periodization like "postrevolutionary", which seem to suggest that the revolution was over by 1934, if not earlier. (Beezley, 2007)

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The Revolution's Second Generation: The Miracle, 1946–1982 and Collapse of the PRI, 1982–2000

RODERIC AI CAMP

One of the interesting ways in which we can understand the historiography of the second half of the twentieth century is through the collective biography of Mexican leadership. Obviously, viewing Mexico's political development through the changing patterns of its national leaders provides only one vision of the changes which took place from 1946 through 2000. Nevertheless, the composition of Mexican leadership is both a reflection of broader societal changes as well as changes wrought by the very leadership which mentored each successive generation.

Most of the analysis in this chapter is based on an original data set which the author produced in 2009, a comprehensive revision of early biographical data of Mexican national leadership beginning from Porfirio Díaz's 1884 administration and culminating with the third year of Felipe Calderón's administration in 2009, part of a four-decade historical effort labeled the Mexican Political Biography Project. I will be citing information from the 2009 version of this project, which contains detailed background information ranging from date and place of birth, to extensive public and non-public career experiences, to family background variables such as parents' socio-economic condition, parents active involvement in public life, and kinship linkages with individuals prominent in military, economic, and intellectual circles. The 2009 data set contains information on cabinet secretaries, assistant secretaries, and *oficiales mayores* in the executive branch, repeating senators and deputies in the legislative branch, and supreme court justices in the judicial branch. It also includes all state governors. The data set includes 2,973 individuals from 1934 through 2009 who meet this institutional criteria, as well as other prominent figures who influenced Mexican politics, including guerrilla leaders and opposition presidential candidates from smaller, generally ephemeral parties. (Camp (2010)) We will be examining data beginning with the crucial administration of Miguel Alemán

(1946–1952), to the rise of a new generation of opposition party politicians from the National Action Party (PAN), the Democratic Revolutionary Party (PRD), and from dissenters within the traditional Institutional Revolutionary Party (PRI).

The Rise of the Civilian Politician

The most crucial political issue facing the direction of Mexican leadership in the 1945–1946 presidential succession was the question of civilian versus military leadership. (Camp, (2005) 25–26) It should be remembered that since 1920, which marks the institutionalization of Mexican post-revolutionary leadership, all presidents of Mexico were major or secondary figures in the combat phase of the Mexican Revolution. In other words, the victors of the 1914–1920 battles that occurred among the surviving revolutionary generals determined the institutionalization of Mexican politics and the structures which defined the Mexican state for decades to come, beginning with the 1920–1924 administration of General Alvaro Obregón, and his successor, General Plutarco Elias Calles, 1924–1928. When Obregón was assassinated in 1929, after being elected but before taking office as president, the revolutionary leadership faced a crisis. That important single event prompted Calles, and other prominent figures associated with Obregón and Calles, to develop an institutional solution to the political vacuum created by Obregón's unexpected death. Regardless of the differing motivations prompting this group to address this crisis, the most significant decision was to found a national political party organization, the National Revolutionary Party (PNR) in 1929, which provided an institutional vehicle from which this loose post-revolutionary leadership, then dominated by Calles, could determine its candidates for elective office and campaign for those individuals. (Dulles (1961))

With the exception of Emilio Portes Gil, the accidental interim president selected by the Congress (Mexico has no vice-president) to replace the murdered Obregón from 1928–1930, all of the successive presidents were generals who fought in the Revolution. Following the provisions spelled out in the Constitution of 1917, the government was required to hold a new presidential election in 1929. Thus, the first presidential candidate chosen by the newly formed party was General Pascual Ortiz Rubio, a little-known general who had served as governor of Michoacán, 1917–1920, and briefly as secretary of communications and public works in Obregón's administration. (Garrido (1982) 85ff) The decision of the post-revolutionary elites to offer Ortiz Rubio as the party's candidate was critical since it opened the door to the possibility of a better-known civilian who had also served in Obregón's administration, José Vasconcelos, and who had presided over the National University of Mexico in 1920–1921, and then became a renowned secretary of public education during the last three years of Obregon's presidency. Vasconcelos resigned his cabinet post in 1924 to run for governor of his home state, Oaxaca, but President Obregón declared his opponent the winner in the highly contentious election. This outcome prompted Vasconcelos to found the magazine *Antorcha* to oppose the regime of Calles in 1924. Given Vasconcelos' open opposition to Calles, he was forced to go into exile to Paris and then to the United States. Many individuals continued to support his publication and his role as an independent intellectual, including Miguel Gómez Morín, a key figure in the development of Mexico's financial legislation and institutions—including the Banco de México (Mexico's Federal Reserve Bank)—during the Calles presidency, who later founded the National Action Party in 1939, which produced the first successful opposition candidate to the presidency in modern Mexico in 2000. (Krauze (1976) 220ff)

Table 27.1   Educational Experiences of the Alemán Generation

Generations	Institution Attended (%)	
	National Preparatory School	National University
1921–1925	37	53
1926–1930	54	56
1931–1935	42	59

Source: Mexican Political Biographies Project, 2009, from the author's forthcoming book, *Mexico's Leadership, Does Democracy Make a Difference?*

Vasconcelos returned to Mexico in 1928, opposing the PNR's candidate for president in 1929. The election pitted a relatively unknown revolutionary against the national civilian figure. The critical difference between these two men is that Vasconcelos, who came from the revolutionary generation (born in the 1870s to 1890s), was viewed by educated and urban middle class Mexicans as representing the interests of civilians. Naturally, Vasconcelos appealed to many former students and professors from the National University; but his appeal more broadly was that of a cultured, well-educated civilian.

To an entire generation of Mexicans, most of whom were too young to have fought in the Revolution but were deeply affected by the revolutionary violence personally as children, or through relatives who were actual participants, Vasconcelos symbolized effective suffrage, a primary motto of Francisco I. Madero's original 1910 presidential campaign, and civilian supremacy. (Camp (1984) 134–35, 138–39) Those Mexicans born from 1900 through 1919 formed a new generation of public leadership, a generation formed largely through civilian institutional experiences, dominated by public educational systems, and mentored by civilian professors and teachers at these very same institutions.

Surviving members of Alemán's generation who served in his administration have repeatedly told the author in interviews or through correspondence that they were drawn to Alemán's candidacy because it represented civilian Mexican leadership. Many of these individuals are linked to this theme not just as an intellectual value, but because of their personal experiences in the 1929 campaign, during which a number of Vasconcelos's supporters—including a prominent student leader from their generation—were killed by Ortiz Rubio's supporters. As members of Alemán's generation have stated, after losing the election to Ortiz Rubio in a campaign marred by fraud, violence, and political suppression, they wanted to learn how to win an election, and therefore, instead of excluding themselves from public life, they sought positions in the government in order to achieve that end. (Camp (1977) 231–59)

To illustrate the linkage empirically between civilian leadership and civilian education institutions, we can cite some data from the Mexican Political Biographies Project. As the data in Table 27.1 suggest, those three school generations (analogous to graduating classes), which represent the professors and students who populated Aleman's presidency, came overwhelmingly from two public institutions: the National Preparatory School, an academic high school for students planning to enter a university, and the National Autonomous University of Mexico, both located in the capital. Over half of all the graduates from the 1926–1930 generation, including President Alemán, were alumni

Table 27.2 Career Military Officers Serving in the Alemán Administration

Administration	Civilians Versus Military Politicians (%)		
	Career Military	Percentage Change	Civilians
Alemán	10	53<	90
Avila Camacho	21	22<	79
Cárdenas	27	–	73

Source: Mexican Political Biographies Project, 2009.

of these two institutions. Another way of viewing this linkage is to examine the percentage of a president's collaborators who were from his same school generation. One fifth of all top politicians who served in the 1946–1952 administration came from Alemán's own generation (1926–1930), the highest level from 1946 to 2009, with the exception of President Ernesto Zedillo (19 percent).

To further confirm the view that Alemán and his generation were anti-military, we can also demonstrate the dramatic decline in military officers present in his administration in contrast to the two preceding administrations led by former revolutionary officers: General Manuel Avila Camacho (1940–1946) and General Lázaro Cárdenas (1946–1952). As the data in Table 27.2 suggest, although the percentage of military politicians in Avila Camacho's administration had declined from 27 percent in Cárdenas' administration to 21 percent, a 22 percent decline overall, the decline between Avila Camacho's administration to only 10 percent under Alemán, represented a whopping 53 percent shift in the presence of career officers in prominent political posts.

Two outstanding characteristics of politicians from Alemán's era were their civilian backgrounds and their high levels of college education from Mexico City schools. These two features alone produced several notable consequences for Mexico's political development, and especially on Mexican national leadership for decades to come. (Camp (1976) 295–321) Among the most important qualities we can point to is the increasing centralization of leadership from Mexico City. The dominance and disproportionate representation of Mexico City can be traced directly to those institutions which were most responsible for the recruitment, mentoring and socialization of future leading public officials, in this case the National Preparatory School and the professional schools of the National University. A huge percentage of Alemán's collaborators were lawyers, as was the president himself. Since most Mexican politicians in the second half of the twentieth century were mentored by other elite politicians, this produced another feature of Mexican leadership, the role of professors as recruiters, mentors and socializers of future Mexican public figures. (Camp (2002) 24)

While these and other variables were critical to the development of Mexican leadership, the switch from military to well-educated civilians did not lead to the democratic political system which many members of the Alemán generation had vigorously campaigned for in 1927–1928 and again in 1928–1929 elections. Thus, as far as the Alemán generation was concerned, internal political developments within the evolving one-party system dominated by PRI from 1929 to 2000 were significantly affected, but those developments, for the most part, were not transferred to the broader features of the political model, which would have affected the level of citizen participation or leadership accountability.

The Rise of the Technocratic Politician

The Alemán generation, in terms of numerous features characterizing public leadership, exerted an influence well into the 1960s and 1970s. (Brandenburg (1964)) But beginning with the administrations of José López Portillo (1976–1982) and Miguel de la Madrid (1982–1988), and especially symbolized by presidents Carlos Salinas de Gortari (1988–1994) and Ernesto Zedillo (1994–2000), we witness the rise of a different, civilian dominated generation, that of the political technocrat. (Camp (1985)) The Mexican version of a political technocrat, if examined carefully, builds on a number of features that were introduced four decades previously by the Alemán generation. (Camp (1998) 197) Indeed, I have made the argument in my most recent work on Mexican leadership that Mexico can be described as passing through three technocratic generations. This first is represented by the Alemán generation. The second is represented by the Salinas and Zedillo generation, and the third, currently under transition, is represented by Felipe Calderón's generation. (Camp (2010)

What are the linkages between the first and the second technocratic generations and what are their differences? Of the features we have analyzed briefly in the Alemán generation, three similarities stand out between the two groups. First, both generations share a high level of professional education. Second, both generations are well represented by graduates from the National University. Third, similar to Alemán, Salinas, who initiated the impact of the second technocratic wave, relied heavily on fellow students from the National University and on professors from the National University, similar to Miguel Alemán. (Camp (1995) 237–264) On the other hand, several crucial differences exist between these two leadership groups, differences which ultimately impact on political developments.

In the first place, the educational backgrounds shift significantly from law to economics. For example, 44 percent of the politicians born in the decade from 1900–1909, the dominant decade of the birth dates of the Alemán generation, were lawyers. The dominant generation representing Salinas and Zedillo, accounting for more than a third of their collaborators, consisted of politicians born in the 1940s. By the 1940s generation, lawyers accounted for only 29 percent of Mexico's prominent politicians, the lowest percentage of lawyers from 1889 through the 1970s with the exception of the 1950s generation. In contrast, economists, who accounted for a mere 2 percent of the 1900–1909 generation had risen to nearly one in five politicians by the 1940s. This pattern was also occurring among mid-level bureaucrats. (Centeno (1994) 105)

In the second place, a significantly increasing percentage of politicians begin claiming undergraduate degrees from private universities, typically from Mexico City and Monterrey, the most influential being the Autonomous Technological Institute of Mexico (ITAM), the Ibero-American University and the Monterrey Technological Institute of Higher Education (ITESM). Only 3 percent of politicians during the Alemán administration graduated from private institutions. Under Salinas, that figure grew to 15 percent, and by the end of the Zedillo administration private universities accounted for more than one out of five public figures (22 percent). Private universities, both in the composition of their students and the emphasis in their programs, especially in economics, differ significantly from public universities. (Babb (2001) 146–49)

In the third place, the 1940s generation represents a significant rise in the level of education beyond that of an undergraduate professional degree, regardless of discipline. As the data in Table 27.3 illustrate, 15 percent of Alemán's administration boasted post-graduate

Table 27.3   Graduate Education Among Two Technocratic Generations

	Percentages	
Administration	Graduate Level Education	Graduate Studies Abroad
Alemán	15	6
Salinas	46	30
Zedillo	46	31

Source: Mexican Political Biographies Project, 2009.

level work, and 6 percent of his collaborators had studied abroad, primarily in Europe and the United States. By Salinas' administration that figure had increased more than 200 percent to nearly half of all of his collaborators. Even more dramatic, however, is the percentage increase among his collaborators who studied abroad, by an extraordinary 400 percent. Under Zedillo, those figures were essentially replicated.

In the fourth place, the Salinas and Zedillo administrations were characterized by a high percentage of politicians who obtained their graduate education in the United States, mirroring the education of both of these presidents. Under Alemán, 3 percent studied in graduate programs in the United States, under Salinas and Zedillo the figures were 16 and 17 percent respectively.

Why are these experiences, which distinguish this political generation from the benchmark Alemán generation, so significant? The movement away from law, which can be viewed as a generalist education, contributed to altering the orientation and skills of this generation of politicians. Economists were needed because of the complexities of macroeconomic decision-making facing economically-challenged governments, and because of the rapidly developing linkages among economies globally. The shift favoring the importance of economically-trained politicians was represented by another shift away from the importance of federal political agencies in favor of economically-oriented agencies. Thus, Luis Echeverría (1970–1976) becomes the last PRI president to come from the leading political cabinet agency, that of government, which handled most of the significant political and internal security problems in Mexico. (Castaneda (2000) 3–23) In contrast, beginning with José López Portillo—his successor—the two critical economic agencies in the cabinet, treasury and budgeting and programming, produced the next four presidents, all of whom served in either or both of these agencies. López Portillo and De la Madrid were both lawyers, but they also obtained graduate training abroad, introducing that variable at the presidential level. De la Madrid further enhances these new features characterizing Mexican politicians by being the first president to have a graduate degree from the United States, specifically an M.A. from Harvard University.

The rise of graduate-trained political figures and their seeking such education in the United States produced a significant consequence on policy-making. Most of these graduates, led by the three successive presidents beginning with De la Madrid, obtained their education from Ivy League schools, notably Harvard, Yale and MIT. Most graduated in economics and were strongly influenced by American, not Mexican, mentors in graduate school, and therefore their economic ideologies and methodologies of teaching and learning economics were influenced significantly by the leading professors at a handful of institutions. (Camp (2002) 170–188) A number of them returned to Mexico and pursued academic careers, such as President Zedillo himself, and established or revamped

economics programs, including at such leading institutions as ITAM, thus producing a younger generation of Mexican trained economists relying on American curricular preferences. The impact of private institutions cannot be emphasized enough given the fact that these much smaller institutions account for a larger percentage of top public figures with economics backgrounds than does the National University. By the 1950s generation, for example, ITAM accounted for 26 economists compared to only 22 for UNAM, one of the largest universities in the world.

There is little question that the Salinas–Zedillo generation of economists, symbolized by Pedro Aspe, Salinas' treasury secretary, were strongly influenced by American economic models. But beyond the significant policy consequences of these experiences, the economist-technocratic generation believed their educational experiences and meritorious training prepared them to make objective decisions outside the realm of practical politics. Expressed differently, they did not see an immediate need for altering the Mexican political model, making both the model and their own party structure more democratic. Therefore, whereas the rest of Latin America, almost without exception, moved dramatically away from authoritarian regimes, most of which were far more repressive than Mexico's, Mexico dragged its feet to the very end of the twentieth century in making such a transition. (Domínguez and Lawson (2004)) Mexico's economist-technocrats, under the leadership of Carlos Salinas, sought to transform the country economically while placing participatory democracy on the back burner.

As the presidential election of 1994 approached, Salinas designated Luis Donaldo Colosio, his secretary of social development, as the party's candidate. The selection of Colosio by the incumbent president was a compromise choice which, for the first time in decades, shifted the career experiences of future presidential candidates away from the purely financial agencies to an agency which focused on social development and poverty and the political means to implement those programs. Colosio's most distinguished career quality, in spite of being trained as an economist at ITESM and at the University of Pennsylvania—which emphasized his deviation from recent PRI technocratic presidential candidates—was his extensive political experience as president of the PRI and as a member of the congress and the senate, as well as his regional origins and education from northern Mexico. But tragically Colosio was assassinated during the presidential campaign, producing a huge political vacuum and division within the PRI, and was replaced mid-campaign by Ernesto Zedillo, one of the few cabinet members eligible under the Constitution to run at such a late date.

Once again, a major political event, the assassination of a presidential candidate, combined with the uprising of an indigenous movement in Chiapas in January of 1994, opened the door for opponents of the regime from within and without to contest the election, similar to the unusual political circumstances in 1928. The 1994 election produced the largest turnout of Mexican voters before or since. Zedillo won the election, in what was considered by observers to be fair and honest balloting, but he began emphasizing, for the first time, underlying political changes which provided a supportive foundation for the opposition victory in 2000. Thus, unlike the Alemán generation and its disciples—who ignored, neglected and even suppressed the development of democratic principles—Zedillo reinforced a significant shift in that direction, providing credibility for opposition movements which had emerged from an early incision within the PRI in 1987–1988, led by Cuauhtémoc Cárdenas, the son of General Cárdenas. He formed the PRD in 1989 after contesting a fraudulent election against Salinas in 1988, and became

his party's candidate in 1994 and 2000. The PAN, which had run numerous presidential candidates since 1940, settled on an outsider, Vicente Fox, who became their contender in 2000.

The New Democratic Politician

In my recent research on Mexican leadership, which prompted the 2009 Mexican Political Biographies Project, I focused on the central question now characterizing Mexican politicians: has democracy made a difference in the composition of political leadership? The answer to the question is definitely yes. Unlike the leadership which characterized prominent Mexican politicians from 1946 to 2000, it is more difficult to predict future patterns after 2000, largely because of significant differences between the two post-2000 presidents, Vicente Fox and Felipe Calderón, even though they both come from PAN. Presidents since 2000, as has been the case since 1946, continue to determine the makeup of their closest and most influential collaborators, and in doing so, establish trends in the composition of political leadership generally, many of them long-term.

We do not have adequate space to develop many trends which appear to characterize the two democratic administrations, but several variables are worth developing, and can be linked to qualities we have analyzed for the two preceding, important political generations. There are four distinctive leadership qualities that characterized the two recent administrations and which deserve our attention. The first of these qualities is the rise of democratic politics in Mexico, which began at the local level in the 1980s, and achieved success for the first time at the state level in 1989 with a PAN victory for governor in the state of Baja California. The increasing competitiveness of elections, and the dramatic success of PAN and PRD on the local and state levels, led to a situation where the credentials of successful politicians began to change significantly in the 1980s. The single-most important alteration which can be directly attributed to participatory democracy is the increase in national politicians who held elective office at the local and state levels, especially as mayors and state legislators, as well as national politicians who served in the congress before obtaining influential positions in the executive branch. The equally significant and complementary quality which emerges in the backgrounds of post-2000 politicians is the percentage of individuals who were active militants of their respective parties.

It is important to note that, contrary to what we might believe, the majority of politicians during the PRI-dominated era from 1946 were not active party members, nor had they held any significant party positions at the local, state or national levels. In other words, experience in the world of party politics was not a prerequisite to achieving high office in Mexico during those decades. The opposition parties prior to 2000, especially the PAN, altered that pattern since most of their leading figures had actually begun their careers as active party members and leaders, and had run repeatedly for elective office. When PRI candidates began losing to their PAN and PRD opponents in the 1980s, most of whom had been designated from central party headquarters in Mexico City, they began to emulate the choices and credentials of their increasingly successful competition. Indeed, a number of prominent PRI members on the state level left their parties to run for office as members of PAN and PRD.

A second important characteristic of national political leadership since 2000 is that in spite of important shifts within certain regions in Mexico, for example an increase in

prominent figures from the West, resulting from PAN strongholds in this region, essentially little decline has taken place in the importance of the Federal District in producing a disproportionate percentage of Mexico's politicians, even though as late as the 1960s it accounted for only 14 percent of the population. Since the 1900s generation—which dominated the Alemán administration, when the percentage of politicians from the capital doubled from the preceding two generations—there has been an increase in politicians born in Mexico City for every generation except the 1950s, which declined slightly from the 1940s cohort, but rose to an all time high of 38 percent of all politicians in the 1960s generation, the generation likely to represent the next to presidencies. For the last four administrations, roughly one out of every three political leaders is a product of the capital, a distortion the Alemán generation first introduced in the second half of the twentieth century. Thus, while democracy has produced diversification in many ways, it has not altered this longstanding pattern among Mexican politicians.

One of the ways in which democracy has increased the diversity in the composition of Mexican leadership in recent years is through the increased presence of female national politicians. Women politicians have added to the diversity of leadership within all three leading parties because women also differ in many respects in their political backgrounds from men, and some of those differences are more strongly sought after in democratic political systems. (Camp (1998) 167–178) The most important of these background characteristics, which has added to the diversity of political leadership since 2000 and gives women advantages in the recruitment process, is their elective experience in local, state and national offices. In the past, women were often successful in the legislative branch because the more influential executive branch, and the highest policy-making levels, were closed to most women. In a democratic political context, however, as we suggested above, those very experiences made them more attractive to all three parties as the competition for electoral office increased dramatically. Furthermore, women, in many cases, were more likely than men to have had organizational experiences which would be valuable in the give and take of democratic politics, such as labor unions, women's organizations and non-governmental organizations. Without the presence of women in larger numbers in the post-2000 administrations, those career experiences would not be as widely distributed among all leading public figures.

Finally, a political experience which could be found more frequently in the past among leading members of the executive branch has revived in importance since 2000: that of governor. Governors, for the first time in decades, have dominated the presidential candidates of the three leading parties. Five of the six presidential candidates in 2000 and 2006 were governors, and Felipe Calderón, the sixth of those candidates, ran for governor of his home state. The importance of governors as leading candidates for the presidency, and increasingly as members of the cabinet, also contributes to specific qualities which differ from national politicians who never served as governors. For example, while rural backgrounds continued to decline among most national politicians, national politicians who were governors since 2000 were more likely to have come from smaller communities and villages than their non-governor peers. Governors in the democratic period also reinforced the importance of elective experiences at the state and local levels, since half have served as mayors and more than a third as state legislators. Finally, similar to Vicente Fox, who was governor of Guanajuato before becoming president, one out of five democratic governors has had significant business managerial experience in their backgrounds, thus increasing the impact and influence of the private sector in the careers of national politicians. (Camp (2008) 292–315)

In conclusion, political leadership from all three periods analyzed in this chapter has had an impact on the structure of the political system, and on leadership patterns in the successive presidential administrations from 1946 to 2000. They molded the characteristics of the political model, but the political model also produced significant consequences for the composition of the leadership. Despite the dramatic changes Mexican democracy introduced on the composition of leadership since 2000, some patterns can still be traced back to 1946 or even earlier. Political leadership is a continuously evolving phenomenon that is both incremental and innovative in Mexico.

Brief Historiography

One can generalize about the historiography of the Alemán administration by pointing to the severe dearth of serious works on his presidency and on Alemán personally. To my mind, Alemán—as I have argued for several decades—regardless of how one views the consequences of his presidency, is one of the most important figures in Mexican politics in the second half of the twentieth century. Yet, despite his impact on political leadership and on future policies after his administration, no serious biography in Spanish or English has appeared to date. This is a serious gap in the literature on Mexican politics generally and presidential politics specifically. To understand the broader importance of the Alemán generation on Mexican politics, especially on leadership, students can examine the author's earlier work on the importance of the Alemán generation on educational credentials of Mexican politicians (Camp (1976) 295–321) and my chapter "Political Institutionalization and Public Policy, the Impact of the Alemán Generation". (Camp, 2010) The importance of José Vasconcelos's campaign in Mexico in 1929 is developed fully by John Skirius, who has written a masterful account of the campaign. (Skirius (1978)) I have researched the linkage between the 1929 campaign and the collaborators of Miguel Alemán, based on extensive interviews and correspondence in the 1970s with the participants themselves, reported in my analysis of the importance of that campaign. (Camp (1977))

The economic and political failures of this and subsequent administrations have been analyzed by Stephen Niblo's account of the 1940s, where he presents evidence of the levels of corruption which characterized Alemán's administration. (Niblo (1999) 160ff) For the economic failures and successes of the period, see John W. Sherman's account of the Mexican Miracle of the 1950s and 1960s (Sherman (2000) 576). A broad account encompassing the 1940s, 1950s and early 1960s, providing the most sophisticated analysis of Mexican politics at the time, is Frank Brandenburg's interpretation, based on extensive field research, which placed the Alemán administration in the context of its immediate predecessors and successors. (Brandenburg (1965))

The second technocratic generation has received far more attention, largely from political scientists, than the Alemán generation. I have written extensively on this topic for several decades, beginning with a monograph based on the role of economists in policy-making in Mexico and the United States, anticipating the technocratic revolution in Mexico by a decade and a half. (Camp (1977b)) To understand the transition taking place in the twentieth century, economist Raymond Vernon's *The Dilemma of Mexico's Development* remains one of the most readable and prescient accounts of what would happen after the 1960s. (Vernon (1965)) To understand the importance of this phenomenon, beginning with the De la Madrid administration, see my essay (Camp (1985)) in the *Latin American Research Review*. For the significant differences in how the

technocrat was conceptualized in Mexico, and its consequences in Mexican politics, see mine and other chapters in Miguel Centeño's and Patricia Silva's excellent edited volume on Latin American experts. (Camp (1997)) For the broader implications of the technocratic generation one should read Miguel Centeño's insightful analysis of these bureaucratic technocrats' ideology in his highly readable monograph. (Centeño, 1994) Sarah Babb develops in detail how technocratic experiences in the United States affected the curriculum of Mexican private universities and the policies of public economists in her excellent book on *Managing Mexico, Economists from Nationalism to Neo-Liberalism*. (Babb (2001)).To understand how generations of leading political figures in economic decision-making actually made public policy, one should examine Jonathan Schefler's recent book, based on extensive interviews with all the surviving figures responsible for Mexico's macro-economic policies. (Schlefer (2008)) To obtain a general sense of Mexican politics and development from the 1950s to the 1970s, one should also examine Leon Padgett's interpretations in *The Mexican Political System*, one of the most widely used texts on Mexico prior to 1980 (Padgett (1966)), and Kenneth F. Johnson's *Mexican Democracy: A Critical View*, the most critical account, in many ways representing an opposition perspective of this era. (Johnson (1978)) For two perceptive Mexican viewpoints, see Nobel Prize winner Octavio Paz's *The Other Mexico*, an intellectual's incisive political analysis (Paz (1972), and Pablo González Casanova's, *Democracy in Mexico*, one of the few books then providing empirical political statistics. (González Casanova (1970))

Leadership in the post-democratic era has yet to receive extensive attention. The author's forthcoming work cited above will provide comprehensive evidence of the changes occurring among the pre-democratic, the democratic transition and the post-democratic administrations. For an initial attempt in understanding the trends in leadership introduced by Vicente Fox's victory and his administration, see my book on Mexican power elites from 1970 through 2000. (Camp (2002) I also contributed a chapter on Vicente Fox's collaborators to Peter Siavelis and Scott Morgenstern's outstanding effort to understand the entire impact of democracy on political recruitment in Latin America, incorporating a framework developed by the authors. (Camp (2008)) The best works for understanding how Mexico arrived at the point of the 2000 election are Francisco E. González's comparative study with Chile from 1970–2000 (González (2000)) and Daniel C. Levy and Kathleen Bruhn's *Mexico, The Struggle for Democratic Development* (Levy and Bruhn (2001)), which provides a political-economic perspective. The rise to power of the National Action Party is accurately captured in Yemille Mizrahi's work, again providing a scholarly but Mexican perspective. (Mizrahi (2002))

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Photographing Indian Peoples: Ethnography as Kaleidoscope

Deborah Dorotinsky

Part 1

Indian Peoples and Photography

The nineteenth century was the era of inventions, with photography among the most interesting and productive. Ever since its commercial surge that began in the 1860s, it has offered the curious onlooker different and varied views of the world. Photographic images in albums, postcards and magazines, even in museum displays and archives, have made the public aware of how other peoples around the globe looked and lived.[1]

This chapter deals with the photographic images of Mexico's indigenous peoples as seen through the practices of ethnography and anthropology from the last two decades of the nineteenth century until the 1940s. It traces how indigenous groups were imaged and imagined by anthropologists through photography. Although scientific in the intended use, photography of indigenous peoples often entailed romantic portraiture of ethnic types, anthropometry, and even art photography as it moved towards the twentieth century. Thus syntax, and even style in this case, can give an idea of the way these photographic discourses intertwined with anthropological theories—mainly evolutionism and latter versions of cultural relativism —ideas regarding race and political agendas particular to Nation-State construction.

In its early years, even during the time of the daguerrotype, photography took many of its compositional and formal systems from the practice of portrait painting, as can be read in portraiture manuals like *Sur le portrait photographique*, written by Eugéne Disderi in 1862. (Dorotinsky, 2007a) It was as important then, as it still is today, to be able to "strike a pose" if one wanted one's image to be read a certain way. Thus, far from just submitting a likeness—a mimetic one at that—photography also aided in constructing identities through lighting, pose, decor (*atrezzo*) and composition. Not only did the upper classes visit photographic studios beginning in the 1860s, especially since the offset of the French intervention and the arrival of Maximilian and his court, but the owners of photographic shops sometimes pulled people from the so called "populace" up

from the streets to pose for series of "types". This topic and trope of the "popular" or sometimes "National" type is not an invention of the photographers, it was a well established genre in lithography, and appeared in publications such as *Les Français peints par eux mêmes* (as of 1839) or *Los Españoles pintados por sí mismos* begun in 1842 and *Los mexicanos pintados por si mismos* (1854). (Pérez Salas, 2005) Images of this sort, created in the first part of the nineteenth century, fed the romantic imagination in Mexico and elsewhere, but also helped consolidate in the public eye and mind a vision that would define different population groups in the multiple processes of Nation-State formations in Europe, the Americas and in the Colonial world at large.

Imaging race

Historian Alan Knight has stated how difficult it is to measure the impact of certain ideas, like those pertaining to racial equality or inequality in Mexico, particularly when they are so embedded in social relations, not overtly expressed or "deliberately disguised or disingenuously denied". (Knight, 1990) Race was one of the main concepts plaguing anthropological as well as historical writing concerning the Indians. It was the concept used to underline physical and presumably biological differences between population groups, cultural traits and even class. Photography, in particular of indigenous groups in Mexico, can be read against the grain of bourgeois portraiture, and both as constitutive and evidential of epistemological frames where racial difference, inequality and discrimination were consolidated in the nineteenth century in anthropology, medicine, legal discourse and art. One of the main projects in which photography was involved during that century, in a large scale and as a practice, had to do with documenting populations. That is, people of the upper classes resorted to images of themselves because in their likeness they sought a way to legitimate their social and economic status—much in keeping with the traditional social function of the portrait since antiquity—or they sought to image the lower classes, using photography as a means of social control, thus fixing the appearance of the working poor and others considered dangerous like criminals, the destitute, the mentally ill, prostitutes and dark skinned peoples. (Sekula, 1989)

Countries with imperial interests abroad—England and France, to name just two—resorted to photography partly as a means of constructing a visual inventory of their colonial subjects. This index of images contributed to the fixing and stereotyping of populations according to traits such as skin color, nose width, hair and head shape or even use or kind of clothing. (Tagg, 1993; Lalvani, 1996; Dorotinsky, 2003) The photographic image helped shape "otherness" not only as ways of seeing or training our sight, thus teaching how to make difference visible, but also as a device for thinking and producing knowledge of peoples who were different from these upper class, mostly Caucasian males, that dominated the scientific field in the nineteenth century. Probably these racialist and racist discourses signaled by Knight as elusive are best spotted in the work of anthropologists, doctors and jurists writing on biological diversity, criminality and *the Indian problem.*

Historian Elisa Speckman has explained at length the way in which the basic tenants of positivism, by stressing the relations of cause and effect in social phenomena, (crime among them) paralleled those of the physical world. For example, the positivist obsession in determining the cause of criminality was passed on to discourses on racial mixing and intermarriages (hybridity), although not going as far as to adopt a deterministic position. (Speckman, 2002: 93) Taking a Foucaultian perspective, Suren Lalvani and John Tagg

have noted the relationship between medicine, criminology and anthropology in the study of populations (colonial or marginal or both) in the European and American contexts and the place of photography in population management (biopolitics). For the Mexican case, Speckman's study reveals just how deeply rooted Cesare Lombroso's criminal anthropological ideas were in Mexico. Spanish translations of his works arrived in Mexico soon after their publication in Italian, as well as other works by noted criminalists like Ferri. The first reproduction in Mexico of Lombroso's "La antropología y la criminalidad" (*Anthropology and Criminality*) appeared in 1884. Here Lombroso stresses that in comparison to other populations, criminals present fixed and differentiated physical traits thus constructing the concept of "criminal type", assuring us that "criminals of all races tend towards a uniform type, which is the result of a morbid degeneration".[2] Similar studies were undertaken in Mexico. For example, in 1882 Eduardo Corral stated that epileptics had perverse or criminal impulses. (Speckman, 2002: 95) Medical, psychiatric and criminological discourses regarding "type" were central in discussing the classification that would befall Mexican Indians. The stress was laid on racial mixing or miscegenation as either degeneration (*degeneracionismo*) or improvement of racial traits (*mestizaje*).

For example, in 1894 Francisco Martínez Baca and Manuel Vergara undertook a study of criminal types in Puebla's penitentiary anthropometric cabinet, following Lombroso's method. In the study they relate criminality to Indianness thus suggesting that there is a correlation between ethnicity (or race as it was understood then) and criminality.[3] The study was illustrated with photographic plates, each in a grid-like pattern showing 20 bust portraits of a specific crime category. For example, plate 2 in the book is dedicated to homicide cases. Following in Martínez Baca's steps, Carlos Roumagnac published a trilogy on the study of criminality still privileging physical and so called organic causes, regardless of the social factors considered.[4] Lombroso's criminal types entailed a reassessment of J. K. Lavater's seventeenth-century notions on physiognomy and typing as well as Franz Joseph Gall's eighteenth-century phrenological studies regarding brain mass and cranial capacity. This "racial hermeneutics", where anatomy and form were significant in decoding more moral or psychological traits, extended through nineteenth-century medicine, anthropology and criminal theory, and moved on to eugenics and biotypology in the twentieth century.[5]

Photography was pivotal in all this as a means of "data collecting" and evidence generation; in so doing it constructed the visual images of poverty, illness and Indianness. Giving syntactic neutrality to the photographic composition supposedly ensured objective registry; that is the fewer items that were added to the body, the less context information was provided, the closer the image would reflect the type's *true* nature. But it was not only the body of the Indian, the criminal or the mentally diseased that photographic images tried to make visible: the body of the Nation emerged from all of these either by opposition, elision or analogy.

During the second half of the nineteenth century, much of the anthropology in Mexico was done either by some of the members of the *Sociedad Mexicana de Geografía y Estadística*, by participants of the *Comission Scientifique* sponsored by Maximilian of Habsburg during the French intervention in México (1862–67) or, towards the end of the nineteenth century, by employees of the *Museo Nacional de Antropología, Historia y Etnografía* (known plainly as *Museo Nacional*). At its outset in Mexico, anthropology and the study of the human body entailed some archaeological practices as well as some borrowed from comparative anatomy, thus the measurement of excavated skulls and

bones and their comparison with those of living ethnic groups was common. At least two clear assumptions underlay these comparisons: one was that they helped establish a link between the pre-Hispanic peoples and contemporary Indian groups—by the 1860s already considered harbingers of the true national heritage—and two, they also placed living ethnic groups in the evolutionary perspective as closer to primitive rather than to modern mankind. Most studies dwelled on measurements of body parts as indicative (indexical) of brain functions and intellectual capacities, like those undertaken in anthropometric cabinets in jails. (Martínez Baca y Manuel Vergara, 1892; Stocking, 1990; Gould, 1981) Thus the literal "arrest" of the body within the photographic frame entailed a taxonomic enterprise while at the same time it involved what James Clifford as called the "salvage paradigm". (Clifford, 2002) Not only did the study of *races* imply a close and practical classification of difference, both cultural and supposedly phylogenetic, but it also entailed a conservation practice, a means of preservation by framing and posing. Thus, like a box containing field data, a photograph became in the anthropological cabinet, in universities, institutes and museums, a space for the preservation of information pertaining to the culture it came from. Many of the images generated by anthropological fieldwork were put to this use, until the materials started being viewed both with other eyes and from a post-colonial perspective. (Edwards, 1994)

The idea that indigenous populations were lower on the evolutionary scale dominated much anthropological thinking in the United States and Europe and as such was also the dominant paradigm to which most Mexican anthropologists subscribed until well into the twentieth century. It followed the lines traced by Morgan, Lombroso, Agazzis and Bulnes. Basking in this ambiance of scientifically articulated and promoted racism, Mexican anthropology developed under French and North American influences.

Travelers and Scientists

Since the end of the eighteenth century, the Spanish Crown had allowed for limited scientific travel in its American territories. Malaspina's and Humboldt's expeditions were probably the most prominent; visual documentation played an important role in both.[6] In some of the drawings made by Tomás de Suria and Juan Ravenet during Malaspina's expedition, the European explorers are included among the Indian subjects, thus acknowledging that both are contemporaries. This co-presence vanishes in the photographs until very late in the twentieth century.[7]

After Independence from Spain (1810–1821), the Mexican governments during the nineteenth century opened the country to exploration and several artist-explorers rendered images of the landscapes, cityscapes and peoples. Many of the archaeological expeditions also produced images of local Indian population. (Trabulse, 1996; Rosa Casanova, 2003; Debroise, 2001)

Toward the last decade of the century, systematic anthropological research began. Two anthropologists coming from North American Institutions traveled to Mexico during the 1890s; Carl Lumholtz, of Norwegian origin, hired for special projects by the American Museum of Natural History (AMNH), and Frederick Starr who worked for the University of Chicago. Both returned to the U.S. with different collections, among them photographs of the peoples they visited and lived with during their research travels. Their approaches were partly similar, although Lumholtz can be said to have held a more romantic outlook while Starr was a confirmed evolutionist. Carl Lumholtz took his own photographs, while Starr had photographers traveling with him during his trips. Both

men had permission of Porfirio Diaz's government for their expeditions and carried letters of presentation for local authorities.

Carl Lumholtz's trips (1892–1898) were prompted by his desire to encounter living remnants of the vanished peoples of the American Southwest.[8] He believed that *real* primitive peoples were growing fewer by the year and that the opportunity to document them in the American Continent was important. Thus, under the impression that the Tarahumara peoples were "untouched" by civilization, Lumholtz hoped to shed some light on the lives of other no longer existing American races. (Lumholtz, 1904) Leah Dilworth has rightfully called this "imperialist nostalgia" following anthropologist Renato Rosaldo's definition of it as a kind of *longing* for that which one is an accomplice in destroying. (Dilworth, 1996) Lumholtz was a trained photographer and established interesting processes of empathy with some of his photographic subjects, in particular two shamans amongst the Huichol and the Tarahumara peoples. (Plate 17) Moreover, he also submitted photographs of naked native women, sometimes with a measuring rod to the side, others displaying their genitalia. Since he traveled on his last trip with physical anthropologist Ales Hrdlicka, we may never know if these images were ordered by him. There had been some interest in nineteenth-century Mexican medical studies on the form of Indian women's uteruses, stressing that their form affected or favored pregnancy and labor. (Gorbach, 2008)[9]

Frederick Starr, a contemporary of Lumholtz, also arrived in Mexico during the last decade of the nineteenth century. He had the support of Díaz's government and was backed by the University of Chicago. He had a harsh perspective on native intelligence and contrary to Lumholtz was not a photographer but took with him Charles B. Lang of Bluff City, Utah and Bedros Tartarian. (Starr, 1899: 8) Photographs taken by them appear, inverted sideways, in an album known as *Indians of Southern Mexico* published in 1899 and dedicated to President Díaz and Manuel Fernández Leal, at the time secretary of Fomento. Starr's main interest on this trip was to document and illustrate "native tribes". He made his first trip into Mexican territory on horseback from the city of Oaxaca to Guatemala in 1896.[10] The images in Starr's album include mostly frontal and profile portraits, (Plate 18) the standard social control image at the time, and also full body images to display attire and garments, house façades, some work related activities and landscapes. Starr believed that Mexican Indians were "ignorant, timid and suspicious. Much time would be necessary, in each village, if one depended upon establishing friendly and personal relations with people." Nevertheless, with the assistance of the government everything would be done quickly and easily. (Starr, 1908: preface VI) He traveled in the southern part of the West Coast, and his approach differed greatly from Lumholtz's. While the latter mentions several times having trouble in gaining peoples cooperation with his expedition, in his book *In Indian Mexico*, Starr profusely narrates the many occasions in which he used public law enforcement to force Indians into submitting to measuring, photographing and casting (making cast molds for later use in the Museums). This was the case among the Zapotec in Mitla and among Zapotec women in Juchitán whom he had taken by force to be measured. (Starr, 1908: 142–145,162–165)

Not considered among these prominent and trained anthropologists, French industrial chemist Leon Diget first traveled to Mexico from 1889 to 1892, for the Rotschild firm out of Paris, to work in the *El Boleo* mine (close to Santa Rosalía, in Baja California del Norte), a place that became the foremost copper producer in the country. During this first stay he put together an interesting collection of zoological, mineral, botanical

and archaeological specimens from the state. The scientific and museographic importance of this collection earned him an official appointment from the *Ministère d'Instruction Publique* for a scientific expedition to Mexico. He made five subsequent trips to the country. His photographs are by far the simplest and have mostly to do with physical types for an index of native peoples.

What the images gathered by these researchers share is a common formality that differs from the studio photograph mostly because of the prevalent white sheets on the back, used to create a neutral environment that accentuates the typological or taxonomic characteristics of "specimen" and erases context. From all three, Starr was the most insistent on having subjects photographed in a manner emulating Alphonse Bertillon's police photographs. These images lacked the measuring rods or reticules used in other European and American anthropometric images. A few of the portraits, in all three cases but mostly in Lumholtz's, can compare in aesthetic effort and achievement to the photographs of the American Indians taken by Edward S. Curtis.

Part Two

Anthropological Studies in the *Museo Nacional*

Most historians of Mexican anthropology recognize that, for nineteenth century historiography, the country was divided in two: a hard working, forward going *mestizo* group, and a backward pulling Indigenous population (Francisco Pimentel, 1864; Francisco Bulnes, 1899; up to Andrés Molina, Henríquez 1909).[11] During the nineteenth century, fraught with differences between liberals and conservatives, the Indian question (*el problema indígena*) was not at the forefront of development issues until industrialization reached its peak during President Porfirio Díaz's long regime. If the question of consolidating a Nation made any sense, it implied a people sharing ideals, language, history, religion, hopes and aspirations. For many of the early twentieth-century thinkers it implied a more homogenous physicality. In the discourse on the Nation, the Indians were welcomed when they were "historical Indians", that is, dead Indians. Living Indian peoples would be incorporated into the rest of the *national* population through miscegenation.

Classification implied an exercise in the definition of what ought to be identified as "Indian". Note that at the beginning of the twentieth century, this term was rather generic; there was no systematic differentiation of ethnic groupings, although philological and incipient ethnographic studies had been undertaken on Indian languages and groups through the nineteenth century. Photography was instrumental for documenting, asserting and testifying to diversity, yet, much generalization about indianness prevailed in anthropological discourse.

In England as early as the 1860s, the founder of the Eugenic movement, Francis Galton, had used composite photography (images made of multiple overlaying exposures) in trying to come up with specific "ideal" types of the criminal and the sick, and also of family groups. The documentary trait of the photographic image was bent to construct imaginary types to allow visualization of concepts such as "jewishnness". Eugenics entailed establishing prophylactic means to avoid degeneration. This meant a particular conception of genetics with an emphasis on the power of the environment over organisms for acquired characteristics (a distortion of Lamarck's ideas or *Lamarckism*). As Nancy Lays Stepan has noted, "Genetics in the early twentieth century

was a new way of organizing people's understanding of how to think of variation in animal and plant populations, what the environment did to variation and how human agency could, as a consequence, manipulate aspects of human variation". (Stepan, 1991: 200) It is in this interstice of the malleable and the fixed that the idea of a love for hybridity—what Alexandra Minna Stern terms "mestizophilia"—appeared in Mexican biopolitics. (Stern, 1999)[12]

Population management lay at the heart of *indigenista* politics from the end of the Revolution. Like the Nation building projects promoted during the nineteenth century, those of the decades after the Revolution (1920–1950) aimed to consolidate a strong State that could bring about the much hoped for national unity.

Dr. Nicolás León argues that as early as 1889 there was already a well-rooted ethnographic, archaeological and anthropological perspective in the country. (Nicolás León, 1922) This perspective was developed mostly in the halls of the *Museo Nacional* (National Museum). The Anthropology and Ethnography program in the Museum was established in 1903, where Nicolás León organized at least two expeditions in 1904 and 1907 to visit different Indian tribes. Photographs as well as plaster casts were taken of different subjects and *huipiles*, bands, pants and hats were collected. A cast made of a Popoloca couple was exhibited at the Department of Ethnography in the Museum, probably from León's study of this ethnic group in 1904. But León contributed to physical anthropology also by producing a Guide for Anthropometric Measurements, although his research activities extended to history, ethnography and linguistics as well. (Plate 19)

By 1910, Francisco Belmar (secretary of the Sociedad Mexicana de Geografía y Eatadística) created the *Sociedad Indianista Mexicana* with the mission of carrying out the integral study of the Indian peoples with their *evolution* in mind through the teaching of Spanish and the defense of their traditions and ethnic characteristics. (Sierra Carrillo, 1994: 35) Two institutions also helped foster ethnography and anthropology in the first decades of the twentieth century: the *Escuela de Altos Estudios* where Jesús Galindo y Villa taught archaeology (also in the Museo Nacional), and the *Escuela Internacional de Arqueología y Etnología Americanas* (1911). Eduard Seler was its first director and Franz Boas succeeded him. Although the school precariously survived through the Revolution, it could not outlive the economic consequences brought about by the First World War and was finally closed down in 1920. (Sierra Carrillo, 1994: 43) Manuel Gamio, widely recognized as one of the founding fathers of modern Mexican anthropology, received his education partly there, in the Museo Nacional and with Boas in Columbia University. It was he who later took on the systematic study of indigenous groups.

Manuel Gamio was one of the main proponents of the cultural value of Indian peoples, their cultures and ways of life. It was he who fostered the study and knowledge of ethnic peoples in order to better government policies. In 1917 the Dirección de Antropología was created within the Secretaría de Agricultura, and Gamio directed it until 1925. He was in favor of cultural integration, but was more of an *indianista* than a mestizophiliac. For the publication of his study of the population of the Valley of Teotihuacán, using a holistic approach to regional research (he called it *método integral)*, Gamio included several photographs of Indians posed against a white cloth just like in Starr's album. His anthropological thought was still much tainted by evolutionist and positivist ideas. He used photography as an instrument for differentiating mestizos, Indians and whites: as a classificatory tool. Nevertheless, Gamio did believe that knowledge of the Indian population was necessary to make their living conditions better and that their development and integration to national culture would enrich it.[13] He

produced one of the first ethnographic films in México, the *Fiestas del señor de Chalma* (De los Reyes, 1991). It was Gamio's intention, while working at the Dirección de Antropología to compile a series of ethnographic files, among them photographs of each and every Indian group in México. He did not finish this project, but Carlos Basauri did complete a similar study in 1940.

Carlos Basauri was not surrounded by a professional anthropological milieu, but worked from within the Secretaría de Educación Pública (SEP), the main institution charged with the most important task of creating new citizens. The belief in the power of education as a means of lifting populations out of their backwardness was so strong, that the production of knowledge regarding *campesinos* and *indios* surged from the 1930s. Education, together with hygiene, proper exercise and a healthy diet were believed to help Indians and campesinos out of their cultural and economic backwardness. Integration was still the favored perspective, and photography became not only a means for the study of diversity, in the hope to overcome it, but also a new tool in the fixing of cultural traditions.

Basauri became a teacher from the *Normal de Maestros* in 1920. He benefited from President Calles's (1924–1928) emphasis on the need to make the countryside the axis of national economy.

When Calles was president, Moisés Sáenz became secretary of education and stressed what he called an "integral indigenist action" (*acción indigenista integral*). Sáenz promoted the opening of the *Escuelas al aire Libre* and the *Escuelas de talla directa*, as well as special programs aimed at rural and Indian education. Basauri was already part of the *Dirección de Escuelas Rurales* at SEP, and participated as observer in a study of Tarahumara runners. He was acquainted with the studies of ethnic peoples promoted by the *Instituto de Investigaciones Sociales* of the *Partido Nacional Revolucionario* published in 1928, and compiled by him in SEP as *La situación actual de la población indígena de México*. It was his first attempt at gathering contemporary information on indigenous populations in the country.

His approach was that of integrating the Indians into the National Culture. He was editor of the *Quetzalcoatl* magazine, the voice of the *Sociedad de Antropología y Etnografía de México* (1929–1931, only 5 issues). We can recognize an eugenic perspective in Basauri's work like "La redención del Indio desde un nuevo punto de vista" were he affirms that the Indian can be redeemed from all the *degeneracy* brought about by alcoholism, lack of hygiene, early marriages and faulty unions: "regardless of the stigmata of degeneration that they present, the Indians, are not irremediably lost, they are capable of reacting and coming to life, a new life, in order to occupy a worthy place in human society." (Basauri 1929: 10) Regardless of the SEP's efforts to resolve ethnic troubles through its *Departamento de Asuntos Indígenas*, it was closed down in 1937. (Plate 20) The secretary of education at the time, Gonzalo Vázquez Vela, entrusted Basauri with the job of researching and writing lengthy studies of each of the Indian groups in Mexican territory. In 1940 the final result was published as *La población indígena de México*, it was profusely illustrated with photographs which unfortunately have been lost in the Historical Archive of SEP.

A later edition uses photographs taken mostly by Raúl Estrada Discua, who worked for the Instituto de Investigaciones Sociales at the National University, UNAM. This institute was created in the 1930s and formally recognized until 1939. Its first director, a lawyer and later sociologist and one of the founders of the Facultad de Ciencias Políticas at UNAM, was Lucio Mendieta y Núñez. He had participated with a chapter in Gamio's

La Población del Valle de Teotihuacan, and was intent on bettering Basauri's work based mostly on questionnaires sent to rural teachers and missionaries and thus not neatly constructed out of real fieldwork experiences. Mendieta y Núñez started with a similar enterprise for the study of all Indian population in 1939, in recognition of President Lázaro Cardenas' indigenist actions. Indeed agrarian reform had been important during the general's mandate, but Mendieta y Núñez could not finish the job before Cardenas's presidency ended. He sent photographer Raúl Estrada Discua, an art student from *Escuela Nacional de Bellas Artes*, who had learnt photography with Agustín Jiménez in the early 1930s in the Academy. Estrada Discua was acquainted with *avant garde* photography but had to submit his work to Mendieta y Núñez who demanded as much "neutrality" in the poses and framing as possible. The format chosen by him followed Frederick Starr's album images: frontal and profile bust portraits, full body portraits displaying costume, houses seen from the outside stressing roofing and façades, trades and everyday life, (though images of Indians actually toiling the land are absent), landscapes and objects (which are presented in a modern "still life manner") (Plate 21). The archive was called "México Indígena" and it originally had an estimated 10,000 photographs. Estrada Discua was able to photograph all of the Indian peoples in México between 1939 and 1946. He arrived in the villages sometimes in the company of one of the anthropologists or sociologists working in the field and doing interviews, and sometimes he traveled alone, thus the images were compiled in a more independent fashion, especially towards the mid-1940s. (Plates 22 and 23) (Dorotinsky 2003) Formally speaking, the photographs follow *avant-garde* framing, cropping and points of view, much in keeping with Russian Constructivism and other Mexicans such as Manuel Alvarez Bravo. (Plate 24) Like photographers such as Rotchenko, and even most American Federal Security Administration photographers like Evans and Lange, Estrada Discua photographed his *campesino* and Indian subjects from a "worm's perspective", that is, a very low point of view, looking up, to make these figures monumental.

The job was first considered complete in 1946 and the Instituto de Investigaciones Sociales organized an impressive exhibit in *Bellas Artes* in October under the title "Exposición Etnográfica México Indígena". The aim of the exhibit was to make Lumholtz's "Unknown México" known to the rest of Mexicans, to bring the Indian worlds closer to the modern dwellers of the capital city so that they could recognize and love their brethren. The inauguration of this show, I believe, marks an important highlight in the use of anthropological and ethnographic photography. It can be considered both as closure of a period (that of more evolutionistic and deterministic perspectives) and the beginning of another where photographers like Walter Reuter, Nacho López and Armando Salas Portugal experimented with more dialogic forms of ethnographic photography.

Notes

1   I thank my colleagues Lucia Melgar and Danna Levin who read and commented on one of the drafts of this chapter.

2   Cesare Lombroso "La Antropología y la criminalidad", *El Foro*, 1884, quoted in Elisa Speckman, (2002) *Crimen y Castigo. Legislación penal, interpretaciones de la criminalidad y administración de justicia* (Ciudad de México, 1872–1910), México, El Colegio de México y Universidad Nacional Autónoma de México, p. 94. Recent studies in the history of medicine, anthropology and art suggest that developments of this relationship affected the production of medical, anthropological, criminalist and artistic discourses (texts and images) also well into

the twentieth century. See: Taller 32, *Utopía/No utopía. La enseñanza, la arquitectura, y la administración del deseo*, INBA-Museo Casa Estudio Diego Rivera y Frida Kahlo, diciembre 2005–febrero 2006.

3 Martínez Baca, Francisco and Manuel Vergara (1892) *Estudios de Antropología Criminal, Memoria que por disposición del superior gobierno del Estado de Puebla presentan para asistir a la Exposición Internacional de Chicago, México, Puebla, Imprenta litografía y encuadernación de Benjamín Lara*. In this text Martínez Baca has phrases such as "… pero fuera de la torpeza intelectual, común característica de la raza indígena …" or "entre nosotros se puede sentar como principio que los indios todos son ladrones …" pp. 22 and IX.

4 Carlos Roumagnac, (1904) *Los criminales en México. Ensayo de psicología criminal*, México, El Fenix. He notes there crime may take epidemic proportions and that we do not yet have hygienic means to prevent criminality like we can prevent other infectious diseases (p. 11–12). He justifies the study by stressing that "La sociedad tiene el derecho de escudarse contra aquellos de sus miembros que faltan á las leyes por ella establecida." In this study he tried to provide "varias figures típicas de ellos" (talking about criminals) for early detection and vigilance. Case studies are provided and illustrated with front and profile signaletic portraits of both man and women. See also, Julio Guerrero's (1901) (1996 reprint) *El origen del crímen en México; estudio de psiquiatría social*, México, Consejo Nacional para la Cultura y las Artes (modern prologue by Arnaldo Kraus).

5 Richard T. Gray has worked through these relations in (2004) *About Face. German Physiognomic Thought from Lavater to Auschwitz*, Detroit, Wayne State University Press.

6 Before there were photographs of Indian peoples from Mexico, the Spanish Crown, the Colonial Administration and most of non-Indian peoples in New Spain and abroad were able to imagine "indianness" through drawings and Casta Paintings. Alejandro Malaspina's expedition from 1789 to 1794, following the entire Pacific Coast of the American Continent, took a group of artists along: José del Pozo, José Guio, José Cardero, Tomás de Suria, Fernando Brambila, y Juan Ravenet. Carmen Sotos Serrano, (1982) *Los pintores de la expedición de Alejandro Malaspina*, Madrid, Real Academia de la Historia, 2 vols. See also Katsew, Ilona (curator) (1996) *New World Orders: Casta Painting and Colonial Latin America*, New York, Americas Society, Art Gallery.

7 Fabian Johannes (1983) *Time and The Other: How Anthropology Makes its Object*, New York, Columbia University. Anthropologist Johannes Fabian stressed that ethnographic writing most often implied that the cultural others existed in a time different from our own, in "the ethnographic present". This is what ethnographic images assert as well. When elements from national culture, like cars, or policemen, or radios or boom boxes, appear in the photograph that allow us to date and time these images as contemporary to those other non-Indian peoples or things, the ethnographic present timeline is broken. It is a way of contextualizing them and us together.

8 Lumholtz points out in his introduction: "Dentro del territorio de los Estados Unidos no quedaban, de seguro, supervivientes de la raza que alguna vez habitó aquellas moradas; pero se dice que cuando los españoles descubrieron y conquistaron aquel territorio, encontraron cuevas ocupadas aún. ¿No podría suceder que algunos descendientes de ese pueblo existiesen todavía en la parte N.O. de México, tan poco explorada hasta el presente?" Carl Lumholtz (reprint of 1970) *El México Desconocido; cinco años de exploración entre las tribus de la Sierra Madre Occidental, en la Tierra Caliente de Tepic y Jalisco y entre los Tarascos de Michoacán*, 2 vols. México, ed. Nacional. No page number. The version in English, *Unknown Mexico*, was published by Charles Scribner's Son in 1904 and translated into Spanish by anthropologist Balvino Dávalos on unknown date. Lumholtz had several visits to Mexico with different sized expeditions: 1892–1893 with Tarahumara sand Tepehuano groups; 1894–1897 Tarahumara, Huichol and Tepehuano peoples; 1898 last expedition to Mexico this time with physical anthropologist Ales Hrdlicka to the Tarahumara and Huichol and regions.

9 Lumholtz material is held at the American Museum of Natural History in N.Y. The gynaecological photographs I am alluding to were published in (1996) *Carl Lumholtz:montañas,*

duendes, adivinos ... México, Instituto Nacional Indigenista, p. 76. It is disturbing that historical images are reproduced without any critical commentary. It goes to show how even today gender issues elude editors!

10   Other researchers working and photographing in Mexico at the time, according to Ignacio Gutiérrez Ruvalcaba, were Karl Kaerger, a German agronomist who was traveling in Latin America between 1899–1900. Also in 1903 the American Museum of Natural History hired researchers Fortunato Hernández and Ricardo E. Cicero who took along photographer Rafael García to document their study of Mayo and Ocoroni Indians. Most images deal with everyday life and Holy week (Semana Santa) celebrations. Finally, Karl Preuss worked in the Nayar Sierra among the Cora and Huichol Indians. This collection of 1,230 plates is in the Berlin's Iberoamerican Library. Ignacio Gutiérrez Ruvalcaba, "Atropólogos y Agrónomos viajeros. Una aproximación", Alquimia año 2, núm. 5, enero-abril 1999, México, Sistema Nacional de Fototecas, INAH. pp.17–25. Other researchers, like Teobert Maler and Desiré Charnay, concentrated their work on archaeological findings but they also photographed the ethnic groups they encountered. Charnay, for example, was the first to photograph the Lacandon Indians. For early twentieth-century examples of expeditions and photographs produced by/for the Museo Nacional, see Dora Sierra Carrillo 1994.

11   Probably the most influential work regarding Indigenista thought has been Luis Villoro's 1950s *Los grandes momentos del Indigenismo en México*.

12   Laura Suárez has written at length on the origins, development and agenda of the *Sociedad Eugénica Mexicana para el mejoramiento de la raza* (1931, also known as SME). Alexandra Minna Stern has approached the problem in several places but suggests a more spiritual as well as biological origin of the mestizophilia approach, starting with José Vasconcelos' *Cosmic Race* as one example of this longing for a "better humanity" free of mental weakness, moral bankruptcy and debilitating diseases. The SME was occupied mostly with public health issues: hygiene, sex education, birth control, campaigns against drug addiction and alcoholism that affected Indian populations, but not exclusively. By 1940 Italian endocrinology studies and the concept of the "biotype" as defined by Jacinto Viola and Nicola Pende, were on the rise among social scientists working within UNAM and the Instituto de Investigaciones Sociales, amongst them doctor José Gómes Robleda and physical anthropologist Ada D'Aloja.

13   Manuel Gamio studied with Franz Boas in Columbia University in N.Y. It is possible that, like many of Boas' students, Gamio inherited from him his inclination for documentation.

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Challenges, Political Opposition, Economic Disaster, Natural Disaster and Democratization, 1968 to 2000

ARIEL RODRÍGUEZ KURI

Mexico, like many nations in the Americas, Europe and Asia, experienced a cultural revolution throughout the twentieth century, which accelerated after World War II. These cultural revolutions encompassed a series of fundamental changes in society, which came from the increase (or decrease) of the total number of inhabitants and percentage of those living in urban or rural areas; from the principal economic activity to the ideal and real number of children in a family; from the education levels to the changes in the intensity of religious practices. The implications of a cultural revolution for the political practices and habits of societies are enormous and long-lasting, and Mexico was no exception.

The sum of the socio-demographic and cultural phenomena are important by themselves, but they also have significance for their impact on the political and administrative tasks of national governments, as they influence directly the practices of political representation, in the tendencies of electoral behavior and the forms of civic participation. Closely related to these factors, between 1960 and 2000 was the rise of the mass media (radio, TV, cinema and the written press and, more recently the Internet) that constitute an indispensable historical dimension to understanding the richness and complexity of the contemporary world. Their significance related directly to the number of inhabitants, their education and their civic and political attitudes.

Politics: From Below and From Above

Between 1960 and 2000, three central phenomena characterized the national population: high levels of population growth until the mid-1980s, and then a dramatic reduction; a sustained increase in the number and proportion of people living in cities; and, at the same time, an absolute increase in rural population. In the second half of the twentieth century, Mexico grew from 25,000,000 to 97,500,000 million inhabitants; that is, within fifty years the country more than tripled its population. The annual average increases are convincing: 3.08 percent for the decade of 1950–1960 and 3.4 percent (the

highest in Mexican history) for 1960–1970. In the following decades the tendency began to reverse itself: 3.2 percent for 1970–1980; a more moderate increase of 2.02 percent for 1980–1990 and 1.82 percent for 1990–2000.

This population growth and its distribution, urbanization, migrations to the United States and changes in the general living conditions of the people (literacy, health and access to mass media) modified the perceptions, habits and political behavior of citizens. In the decade of the 1960s, the society was used to, although not resigned to, almost a one party official ruling system. The Institutional Revolutionary Party had not only political, but also cultural, domination. On the other hand, in 2000, the somewhat fair and competitive party struggles in the elections, sanctioned by an independent electoral agency, and the opposition victories in some state gubernatorial contests and in the presidential selection, obscured how solid the official party remained.

Democratization followed a long and, above all, twisted path. The history of that process, and the men and women who created it, requires consideration of topics that have characterized the history of politics. The most important of these has been the overestimation of presidentialism. The 1917 Constitution is presidentialist in its design and doctrine, to the extent that the administration of the nation is exercised from the presidency of the Republic, without being subordinate to the other powers of the government. Moreover, the political system was itself presidentialist given the meta-constitutional powers the federal executive enjoyed, all of them in force until the mid-1990s. This informal control included great influence over mass media communications, de facto leadership of the official party and control of the federal legislature, discretional use of judicial authority and uncontested arbitration in the distribution of favors and punishments to politicians and business leaders.

Nonetheless, presidentialism had limitations and weaknesses that have been ignored or forgotten. For example, the so-called factual powers (national and foreign business groups, the corporate and agrarian union leaders, the Catholic Church, the press, certain intellectual groups) and the society's threshold of intolerance and ideological and cultural resistance. Presidents have not achieved a type of omnipotence, although their behavior most of the time has been authoritarian. The history of post-World War II politics shows that the presidential saga encountered unsurpassable constitutional, political and cultural limitations, such as the prohibition of presidential reelection, the specific influence of the official party and the interest groups, and the anemic fiscal conditions.

Indeed, contemporary history offers another clue for its interpresentation: the perceptions, attitudes and political actions of the various groups that make up the society, which do not necessarily belong to the political or economic elite, have played a role that requires reevaluation to understand the reproduction and adjustment of the authoritative system. These groups appealed to formal participation in electoral politics (such in the 1988 case), or to the somewhat autonomous mobilizations that utilized resistance strategies, or resorted to the diverse modes of dissidence or rebellion against the political order or against the authority (as in the case of the students in 1968 or the indigenous in Chiapas in 1994). This leads to the conclusion that this opposition affected in one way or another how the elite went about making the politics and official policies represented by the PRI.

Political history is not that of one man (the president) or that of a few men (the powerful few), but a complex interaction from the center and from the margins of an authoritative system. The latter is essential to understanding the country's political history. It was not only simply matter of deciphering the codes of an authoritarian system, particu-

larly in the last 50 years, but also unraveling the reasons for its success that was theoretically democratic, although it had an official party and judicial system that made electoral competition illusory and limited the egalitarian achievements of public life.

The designation of Gustavo Díaz Ordaz (1964–1970) as the official candidate, and then his performance as president of the republic, illustrated the multiple socio-cultural decisions of the nation's politics. He was well aware of methods of political control and repression, as he had headed the Department of the Interior (Secretario de Gobernación) during the presidency of Adolfo López Mateos (1958–1970); moreover, he had additional political experience that encompassed positions as fiscal prosecutor, judge, congressman and senator of the republic. While Secretary of the Interior, he had to deal with the political and military crisis that followed the United States's discovery of Soviet missiles in Cuba. This resulted because President López Mateos was in tour in Asia, leaving Díaz Ordaz in charge of national security. He represented Mexico in the relations with the United States government during this enormous hemispheric crisis.

The six years of the Gustavo Díaz Ordaz's government appear floundering, with contradictory, often defensive rhetoric matched by tough threats, and policies marked by violent repression. He made decisions slowly, for example it took him almost two years to begin work of the organizing committee of the Olympic Games to be held in Mexico City in October of 1968. If it had been up to him, as he informed the congress, he would have declined holding the games for the sake of the country's financial and political tranquility.

The 1968 Olympic Games represented Mexico's most ambitious and cosmopolitan undertakings of the post-World War II period. The previous López Mateos government had applied to host the games competing against Detroit (United States), Lyon (France) and Buenos Aires (Argentina). The International Olympic Committee, meeting held in Baden-Baden (Germany) in October 1963, selected Mexico on the first voting round, a fact that surprised nearly everybody. This decision left the organizing and financing efforts to the Díaz Ordaz administration, whose actions as the first Spanish-speaking government and underdeveloped country chosen to host the Games were closely scrutinized by international public opinion.

Some international commentators remained doubtful of the Mexican ability to organize the Olympics. Both international and national observers agreed that the Mexican government had to maintain political order during the 1968 games. Like other cosmopolitan projects in the twentieth century (the 1910 Centennial of Independence celebrations and the coming into effect of the North America Free Trade Agreement in 1994) the international compromise brought about a national political crisis. About three months before the inauguration of the Olympic Games, planned for October 12, the police intervened in street fights among high school students in a popular neighborhood of Mexico City. Police intervention between July 22 and July 30, 1968, proved to be a political disaster as it provoked a student movement that it then repressed.

The 1968 student movement had three characteristics that resulted in enormous historical visibility. Two of them have been questioned by historians. The first was the capacity of high school and higher education students in Mexico City and their allies (teachers, intellectuals, small groups of the middle class and professional politicians, and a very limited sector of the press) to articulate politically the protest in the six-point list of demands and in the mass mobilizations that took over the major avenues and plazas of the city. In this sense the protest was a civic movement to defend public liberties (the freedoms of assembly, expression and petition, as well as the autonomy of high school

and higher education institutions) and denounce the national government's despotic use of police and military forces. The second dimension complements the first. The Governmental made a rigid response and applied force to avoid the militarization of the city without a declaration of state of emergency, and it used violence to occupy the physical spaces of the dissidents, such as the high schools (at the end of July), the National University buildings (on September 19) and of the Polytechnic Institute (on September 23). The Tlatelolco massacre of students on October 2, demonstrated the government's determination, obvious throughout September, to destroy the student movement at any cost. Given its immediate results, the government succeeded on October 2, when it arrested the principal leaders, reclaimed the streets from the students, limited protests to just a few, and arranged the inauguration of the Olympic Games only ten days later without major incident.

The third characteristic of the 1968 protest appears diffused in the accounts of the protagonists and witnesses and in the academic monographs. The spectacle of the barricades in the streets (usually burned buses) demonstrated, but does not exhaust the fact that the protest movement challenged and then took control in physical and symbolic spaces. This is a fundamental aspect of the 1968 protest: power does not exist without the control of territory, particularly in the national capital. Today we know that in some popular areas in the city (the Ciudadela, San Cosme, Tlatelolco) the neighbors behaved as allies of the nearby schools. Here street violence played a significant role. This expressed the anger and the fatigue of an important group of people towards the authoritarian and repressive practices of the national and local governments. In this sense, the street protest of students, neighbors and youths not linked to the schools expresses at the same time the crisis of a city in expansion and that of a demographic pyramid where the baby boomers of the post-World War II era—youths and young adults—earned enormous importance. In many ways, the repression of the 1968 dissidents was directed towards the most notable locations and social representatives of post-World War II Mexico itself—this is what magnified both the perplexity and the pain of Tlatelolco.

Gustavo Díaz Ordaz named his Minister of the Interior, Luis Echeverría Álvarez (1970–1976), his successor to the presidency. Echeverría was the first president of the official party who had not been an elected public official before becoming the PRI's presidential candidate. He made his career in the party, and then in the ministries of the Navy, Education and the Interior. During the 1968 crisis, he had stayed irreparably close to the president and recent investigations indicate that he was involved in the events of October 2 in Tlatelolco far beyond what he has recognized.

Díaz Ordaz designated Echeverría as his successor because the intensity of the social conflict and the consequences of the 1968 repression seemed to demand a man experienced with both political control and violent repression. Although he was invested with the PRI's candidacy, Echeverría sought ways to reconcile students and peasants. During his campaign travels, he often asked for a minute of silence for the students who had died in the 1968 governmental repression. Many analysts regard Echevaría as the founder of a new kind of populism. His critics say he was a demagogue: irresponsible in the economic management of the government, and a politician who offered nothing but words to the people.

The confusion results from the interpretation of the populist character of the Echeverría presidency. It was, in fact, pulled from below and from outside the official party by numerous actors (workers, peasants, students and businessmen). Above all, the official concern with espionage, and threats to national political stability were not, as it had been

in 1968, a paranoid insecurity on the part of the governing group. Rather a high population growth rate, with its correlative pressures on the education, health and employment systems, the decreasing capacity of the economic model, the unequal income distribution and the unbalanced regional development created the urgency, the priorities and the political obsessions for the government. Especially important was government finances and the need for economic development. Studies revealed that the government suffered from extremely low tax-collection. Echeverría twice tried to reform the treasury and failed because of the furious opposition of business groups. Nevertheless, in six years the economy grew significantly at an average of 6 percent annually. Without fiscal reform and in a dispute with businessmen, the government found a way to push the national gross product.

Echeverría was not a democrat and his reforms were deliberately limited. Since 1973, the confrontations between the government and the business sectors had escalated in public life, especially over questions of fiscal policies, at the same time that land reform and foreign affairs created business and land owner hostility. The assassination of Eugenio Garza Sada in Monterrey in 1973, during an attempted kidnapping by a guerrilla group, further divided the national business sector and the Echeverría government reached the point that it could not be resolved. Some business organizations began to search for other political and ideological allies. Public discussions took place between government representatives (or the president himself) and organizations such as the newly-created Business Coordinating Committee (a businessmen's political group established in 1975) or the Mexican Employers' Confederation [Confederación Patronal de la República Mexicana], without success. But the divisions in the 1970s were a lot broader—politically, socially and ideologically speaking—than those of the businessmen. Militant youth organizations appeared in different parts of the Republic and tried to overthrow the regime. Towards 1970 there were at least 15 guerilla groups that believed that armed struggle offered the only catalyst for social change. The social background of these insurgents was varied. In rural areas, the guerrillas came from peasant organizations, traditional parties and teacher unions (such as Arturo Gámiz and Pablo Gómez in Chihuahua or Lucio Cabañas and Genaro Vázquez in Guerrero). In the cities, urban guerrillas had more diverse origins university students with experience in radical student organizations, such the Juventudes Comunistas or the Liga Espartaco; other university students educated in private confessional schools such as those of the Jesuits; or youths from popular neighborhoods in big cities. The government's struggle against the guerrillas (relying on combined military units and policemen) created an abundance of of illegalities and human rights violations: forced disappearances, torture and assassinations.

Echeverría wanted to reconsider the relations between the national government, the official party and the worker unions and the national industry unions. It was no secret that the revision of the relations between the government and the workers was being defined by the abrupt dismissal or at least the marginalization of the great cacique of the Mexican Worker's Confederation, Fidel Velásquez. The union bureaucracy responded with renewed militancy from the official unions around topics such as the constitutional reforms to Article 123 that allowed the creation of the Worker's Housing National Institute (1972) and the reforms to the Federal Labor Law (1973) that authorized the annual revisions of salaries and the emergency salary adjustments (such as the one decreed on September 1973, in the midst of strong inflationary pressures). There were also demands introduced that centered on the general wellbeing of the working population, such as the demand for a 40 hours week, but pay for 48 hours.

Even though the unionization rate slightly decreased between 1970 and 1976, declining from 15.2 percent to 14.1% percent of the economically active population, the number of court petitions for strike action in the local and federal jurisdictions skyrocketed: in 1970 there were a few more than 9,900 summons, but in 1976 there were 38,300 registered. In other words, events seemed to come together to create an opening for organized workers in politics. Such was the case with workers who supported democracy within the electrician's union, who strongly disputed the control of the union by officials backed Minister of Labor, Fidel Velázquez, who had seized control in 1975 and 1976. Auto industry workers formed some of the most autonomous and combative company unions to be found in the history of Mexican unions. This occurred as the auto companies changed from being simple assembly plants to true manufacturers over a modern technological and sophisticated base, which resulted in strong pressures in the production lines.

Demographic pressure and economic stagnation converted the countryside into an arena of intense political and social unrest in the 1970s. Particularly after 1973, the Echeverría government faced militant official and non-official peasant organizations, who demanded land redistribution. The government had, since 1971, elaborated an Agrarian Reform Law, and in 1974 it raised the rank of the government office in charge of redistribution from a department to a ministry. Even further, the government significantly increased the resources for investment in hydraulic infrastructure and agricultural promotion. Given that, in 1975 and 1976, the federal government expropriated high quality irrigated lands in Sinaloa and Sonora, owned by prosperous agrarian elites, there is a tendency to interpret the period's peasant militancy as another phase of the conflict between the business sectors and the president. This was part of the story, but not all. The pressure from below was real and the number of land invasions can probably be counted in the thousands. After 1973 the mobilization for land redistribution became a national phenomenon, which, while it did not have a clear political articulation, acquired a threatening tone for the official control of the countryside. Access to land was not the only cause of unrest. The desire for guaranteed prices of some agricultural products and the salary and living conditions of the laborers also contributed to the rise in the commotion.

In the 1976 presidential elections, the democratic principle of competition between the different political and ideological entities of the official party was empty rhetoric. The high levels of political conflict in the society did not have a reflection in the design and functioning of the institutions created to settle it. The official candidate, José López Portillo, obtained almost 15,500,000 votes (which represented a little less than 88 percent of the casted votes), in an election where 60 percent of the registered voters cast their ballots. López Portillo ran against no one; the historical electoral opposition, the National Action Party (PAN), did not present a presidential candidate due to internal conflicts. The Communist Party, who did nominate one, was not registered with the Federal Election Commission, so the name of their candidate did not appear on the electoral ballot.

The government of López Portillo responded to the problems of the 1976 electorals with the most important electoral reform since 1945. The new law which regulated federal elections opened possibilities for registering political parties willing to compete and established a double representation in the chamber of deputies: of relative majority (the candidates who obtained the highest number of votes in each of the 300 electoral districts) and 100 representatives of proportional representation (according to the percentage of votes obtained by the party).

While in 1976 there were four parties registered with the Federal Election Commission, the number grew to seven parties in 1979 and nine in 1982. While in 1976 the party deputy formula granted 42 deputies to the opposition, the political reform allowed the opposition to add more than 100 deputies in 1979. Although the control of the chamber of deputies by the president and his party was not threatened (the PRI obtained 295 deputies that year and 299 in the 1982 elections)—a broader political electoral system took hold. The political reform of José López Portillo and Jesús Reyes Heroles (his minister of the interior) allowed two longstanding, opposition parties, the communist and the sinarchist parties, to participate in the constitutional elections after decades of being almost outlawed.

The electoral campaign of López Portillo defined a strategy to recover the confidence of the most important business sectors. He named it "Alliance for Production" and it was a proposal that took advantage of the regime's corporate approach to lessen the conflict and redefine the relations between government officials and businessmen with the goal of reorganizing the economy after 1976. It had success. At least until the mid–1981, the government of López Portillo went far beyond the expectations of the national businessmen and foreign investors: in 1978 the economy grew 9 percent; 9.7 percent in 1979, 9.2 percent in 1980, and 8.8 percent in 1981. The years of 1977 (3.4 percent) and naturally 1982 (- 0.6 percent) were the only "bad" years.

In some ways the level of oil reserves, the price of the oil barrel, the international advertising and the availability of outside credits fed the illusion of a presidency superimposed over the conflict, and of a society with a bright future. It is rarely recognized that this illusion was broadly shared by the Mexicans, with the notable exception of the intellectuals Heberto Castillo and Gabriel Zaid, at least between 1977 and 1981 and it generated an important moment of collective euphoria in the country's contemporary history.

Once again the Mexican countryside expressed the reach and limits of presidential will. The renewed social and political conflict in agriculture was important, at least from 1973. Between 1977 and 1978, López Portillo probably tried to moderate Echeverría's agrarian turn by, repressing or trying to moderate the demands for land. But the pressure was so strong enough that, beginning in the second half of 1978, the government had to make concessions to land seekers. On top of these demands for land, there was a clear decrease in food self-sufficiency as Mexico was becoming in a net importer of food (basic grains, milk). López Portillo decided to inject extraordinary resources into the countryside, as Echeverría had previously done, and he also set out to achieve food self-sufficiency by promoting a complex model of support and subsidies called the Mexican Food System (Sistema Alimentario Mexicano). The result of which was onerous and inefficient, and which had only one year of glory in 1981.

When the barrel price of oil began its descent in mid-1981 and when the valve of relatively abundant and cheap foreign financing began to close (and even more when the repayment deadlines of the debt began to accumulate in a short period), balance between income and outflow no longer existed. The president had to face decisions that, without the cushioning of these resources, had obvious and important political costs. To restrict government spending and devalue the peso seemed the only solution during the second half of 1981. Both measures placed pressure on all government offices and generated public debate and even resistance of varying nature within sectors of the official party. Nevertheless, the president and his advisers believed they could manage to handle these responses.

The crucial year, 1982, in the long run proved to be a turning point in the nation's recent history. The economic crisis drove José López Portillo to decree the expropriation of the private national banks and the control of monetary exchanges on September 1. This surely was one of the most successful undercover operations of Mexican governments in the twentieth century. Almost all historical interpretations of this action considered it to be either an almost personal settling of scores by a paranoid president with former allies (the bankers), or an inefficient and last minute effort to vindicate the principles the Revolution. Even within the government, leaders in the financial bureaucracy, Miguel de la Madrid among them, backed away from the measure, and aligned themselves with the opposition. This resulted in expanding the governments's authoritarian habits to achieve the administration's goals.

Miguel de la Madrid Hurtado, president of the Republic from 1982 to 1988, obtained a little over 16,000,000 votes, about 68 percent of those cast; such a percentage represented a drop of 20 percent points next to the results from the PRI candidates in the 1970 and 1976 elections. Not such a strange phenomenon given that this was the first election after the 1978 political reform and it took place just as the storm clouds of the 1982 economic and fiscal hurricane appeared in the horizon. That the opposition had taken more than 30 percent of the vote (the National Action Party obtained 15 percent) was the natural by-product of the opening of the rules of the political-electoral competition.

With a comfortable majority in the legislative branch (298 out of the 400 deputies and the 64 senators of the upper house), De la Madrid proposed a series of 19 constitutional reforms. Although not all of the changes were in the same vein, one of the De la Madrid's priorities, and a fundamental concern since the campaign, was what he called the "moral renovation" of society. This aimed at a response to the widespread perception of corruption in the previous administration. Nonetheless, De la Madrid was more cautious in modifying the rules of the political-electoral competition; in the final settlement, his reform was insufficient in regards to electoral mechanisms and creation of a efficient tribunal; and he made little progress toward judicial control of the elections; the minister of the interior continued to preside over the Federal Election Commission. Although popular representation in the Federal District (the assembly of representatives) was first created in 1929, it had only administrative, not legislative, functions. This represented a failure that needed resolution.

If the constitutional reforms proposed by De la Madrid and if all his plans for desirable economic development are compared to the net results of social development and the economic recovery, we find a dismal performance. This must be placed in context: between 1983 and 1988 the economy only grew 0.1 percent annual average and the gross domestic product per capita climbed a mere 2.5 percent per year. Nevertheless, not even the dramatic consequences of the 1985 earthquakes persuaded the president to undertake more aggressive negotiation to manage the foreign debt.

In order to understand the administration's timidity in the debt crisis, it is necessary to recognize that the international stage had been modified in a dramatic way at the turn of the 1980s with the arrival of Ronald Reagan in the United States presidency, with a neo-conservative regimes in other countries of great strategic importance, and with the over-heating of the Cold War. Indeed, De la Madrid had to keep the country's interests in Central America safe when the so-called Grupo Contadora (to which it belonged, along with Colombia, Panamá and Venezuela) exercised an efficient counter-weight to the U.S. policy opposed to the Sandinista government of Nicaragua and the leftist faction in the Salvadoran civil war that could have resulted in direct military intervention.

The foreign policy of Miguel de la Madrid strengthened the inherited idea of his predecessors that Mexico should take a more active role in the areas where it had direct strategic interests. Nevertheless, the Mexican international position remained a commitment to the principle of non intervention in the internal affairs of other countries. This placed Mexico at odds with the United States.

The September 1985 earthquakes changed the political environment, especially in Mexico City. The failure of the national government to respond to the crisis created tremendous frustration. Local communities had to organize on their own to rescue victims and to rebuild or find new housing. These community groups took to the street, first in Mexico City and then in other cities, to express their dismay with the administration and to use it as a place for political negotiation between the growing and non-disciplined margins of society on one side, and the government on the other. In this sense, even before the most important electoral reforms, a new era in mass politics had begun.

At the same time, the representative of the most radical and least republican faction of the national political class arrived in the presidency. Carlos Salinas de Gortari, who had acted as the minister of planning and budget in the De la Madrid government, officially won the July 1988 elections. Although the official numbers show that he obtained a couple of tenths more than 50 percent of the total votes, the great surprise was the performance of Cuauhtémoc Cárdenas. The son of General Lázaro Cárdenas, he had unsuccessfully proposed democratic reforms within the PRI. For his efforts, he was practically expelled from the party. He found political shelter first in some minor parties who backed him for president. His candidacy received a boost with the support of the Unified Socialist Party of Mexico (PSUM)—the most important Mexican leftist organization. Officially, he received 31 percent of the national votes, the highest percentage for any opposition candidate in the post-World War II period, and many believed he had received many more votes.

Nonetheless, the big problem was not the absolute number of votes or the percentages, but suspicion of fraud. Both the marked asymmetries of resources available in the campaign of Salinas de Gortari in comparison to the other candidates, as well as the delay in the release of the official numbers and the atypical behavior, statistically speaking, of many polling-stations and electoral regions contributed to this suspicion. Throughout the first period of the Salinas de Gortari government there was an effort to escape the ghost of the 1988 elections with flashy new programs.

This presidency began with spectacular measures, conveniently broadcast by the press in an uncritical way that aligned them with the new president. The abrupt dismissal of the leaders of the oil workers union (who had flirted with Cárdenas) and of the teachers union, opened important spaces for the new government, in terms of its public image as well as its implied power. But two other matters, never discussed during the campaign, in the long-run characterized the Salinas de Gortari government: the re-privatization of the nationalized banks in 1982 and the negotiation and signing of a free trade agreement with the United States and Canada.

Between 1989 and 1994 economic growth recovered somewhat, above all as a result of the expectations generated by the North America Free Trade Agreement (NAFTA) and the modernization rhetoric: the economy's annual growth rate was 3.9 percent, still below that experienced in the 1960s and 1970s, and the gross national product per capita increased less than in the golden years of the economy with only 1.9 percent annually. Political change marched even slower. In spite of the controversial results of his own election, Salinas de Gortari did not want to accelerate the political reforms that would

give autonomy to the national electoral committee and transparency to party financing, especially of official party candidates. His government continued cultivating special and mutually-convenient relations with a segment of the mass media—especially with the television monopoly exercised by Televisa. As a result the official party had a spectacular recovery in 1991 mid-presidential legislative and gubernatorial elections.

As 1994 approached, it seemed that what began with difficulty would end in success. The appointment of the official candidate, Luis Donaldo Colosio, was closing a circle of luck of presidential infallibility, in which Salinas de Gortari seemed to believe blindly, in the Luis Echeverría style. Colosio was the man of Salinas de Gortari's confidence: he had been the president of the official party, the PRI, and at the time of his nomination he was the minister in charge of assistance policies and the government's fight against poverty; the only question was if he had any political ideas of his own beyond the official party statements. This seemed to be a perfect succession, in accord with the practices and superstitions of the political system.

On January 1 1994, a group called the Zapatista National Liberation Army revolted in some Chiapas. There were intense combat in some localities (the most bloody in Ocosingo) and the capture of towns of great symbolic importance (such as San Cristóbal de las Casas). The national army, which had previous information about the uprising and its plans, nevertheless was surprised: its reaction was prompt and efficient and it quickly recovered the occupied towns. The Zapatistas delivered an extraordinary political and propagandist blow. NAFTA came into effect on January 1 and the same day the Zapatistas initiated an insurrection that continued for 12 days of combat between the army and the insurgents. In the midst of strong national and international pressures, the national government decreed a ceasefire and began the negotiations. In their first public documents the Zapatistas declared war against the government, but what was more persuasive was their demands. They made an emphatic complaint about the economic and political marginalization of the indigenous groups and warned that they would not remain silent or passive in the new phase of the economic integration.

Then came the assassination of the PRI Presidential candidate Luis Donaldo Colosio in Tijuana, in March 1994. National politics went from a phase of official party control to what many observers regarded as vendettas among political clans. Nonetheless, the available evidence shows that the assassination of Colosio was the work of an individual and not an organized conspiracy. At any rate the crime unhinged the system. Pedro Aspe, minister of the Treasury, was the president's favorite to replace the assassinated candidate. Aspe, nonetheless, he could not meet the constitutional requirements of the period of separation from a previous public post. Of the few trusted supporters available, the president chose Ernesto Zedillo Ponce de León, a former minister of Education.

Zedillo comfortably won the 1994 presidential elections (with a little bit more than 48 percent of the cast ballots), which was surely contributed to by society's fear in the face of insurrection and assassination of the recent months. But the months ahead would bring more surprises. Following the assassination of Luis Donaldo Colosio, the dollar reserves of the central bank had decreased markedly. The elections and the assassination of a close collaborator of the president-elect in September, contributed to an increase in dollar demand. In the first days of the new government, in December of 1994, a financial crisis exploded that resulted in a spectacular devaluation of the peso against the dollar. The economy fell into a deep recession the following year, with a fall in the gross national product of close to 6 percent.

Paradoxically the economic earthquake, which unleashed a wave of business and family bankruptcies, benefited the new president and buried the public reputation of Carlos Salinas de Gortari. Whether it was through conviction or as a response in the midst of the emergency, Ernesto Zedillo allowed the judicial process to proceed against the brother of the former president, accused of homicide and, above all, he negotiated with the opposition the most important electoral reform since that of López Portillo, 20 years before. The reform granted broad autonomy to the electoral commission and opened the government of Mexico City to electoral competition for mayor. In the intermediate congressional elections of 1997, the president and his party lost their absolute majority in the house of deputies and some state governorships and mayorships of the national capital.

The economic recovery was fast, because of the influence of the US economy that was having one of its best ever decades. A line of credit given by the government of President Bill Clinton for 50 billion dollars (out of which, in the long run, only 20 billion were used) contributed decisevely to save the situation. Nonetheless, the national economic performance would not be enough, given the immediate effects of the 1995 disaster and the inertias dating to the 1980s; between 1995 and 2000, the gross domestic product grew 3.3 percent annually and the per capita a meager 1.7 percent. The paradox illustrates Mexican underdevelopment: in the 1960s and 1970s the gross domestic product per capita behaved at the level of the circumstances, even with the high levels of population growth. But in the following 20 years, when population growth decreased in intensity, the economic performance was so weak that there was a net fall of the wealth available per inhabitant.

With the results of the intermediate 1997 elections came the announcement that Vicente Fox Quesada, governor of Guanajuato, was a candidate for president. He gradually obtained the support of his party (National Action), so that he had no problem in November of 1999 in securing the nomination. Eventually, with other parties in support, his candidacy was called the Alliance for Change. The PRI, on the other hand, had to undergo an exhausting internal competition, out of which Francisco Labastida Ochoa emerged victorious. The left put forward the candidate of the last two presidential elections: Cuauhtémoc Cárdenas. Fox managed to capture popular views with the slogan "kick the PRI out of Pinos" (the name of the presidential home).

The results overwhelmed the nation. Vicente Fox received a little bit more than 42 percent of the national votes (almost 17,000,000) against 36 percent for the PRI candidate and 16 percent for Cárdenas. The difference was enough to prevent any electoral maneuvers in the style of 1988. Fox thus won the first victory of the opposition in a presidential election since the creation of the official party in 1929. His victory seemed to offer proof that democracy had been created, even though additional political reform remained pending. Nevertheless, a new phase national political history had begun. Mexicans celebrated the Fox victory as a change they thought they would never see.

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Fighting Bacteria, the Bible, and the Bottle: Projects to Create New Men, Women, and Children, 1910–1940

GRETCHEN PIERCE

The song "The Shame of Alcohol," written by students at an Hermosillo, Sonora school, informed classmates, and all those who attended the 1929 anti-alcohol parade at which it was performed, that "what Mexico wants is manly men," and it defined these men as sober, reliable fathers.[1] In 1930, Luis G. Franco, director of the Dirección Antialcohólica, or the Anti-Alcohol Bureau, (DAA), spoke to women over the radio, reminding them that as good wives and mothers they ought to protect the sanctity of the home and, by extension, the nation. They could do this by persuading their loved ones not to imbibe.[2] At the 1936 Primera Asamblea Infantil Antialcohólica, or the First Children's Anti-Alcohol Assembly, the young delegates had the opportunity to attend panels that encouraged them to be responsible and politically active. The themes of two such panels were "Alcoholism as an enemy of economic and social progress in our country" and "The role of the child as a propaganda agent in the anti-alcohol crusade."[3]

These examples—a song written by public school children, a speech given by a federal bureaucrat, and panels organized by that bureaucrat's department—all indicate Mexican revolutionary governments' concern with creating sober citizens between 1910 and 1940. Not only did these leaders fight the bottle, they also fought bacteria and the Bible, for public health, anti-clerical, and anti-alcohol campaigns were all part of the larger goal of molding New Men, Women, and even Children. Employing cultural and educational strategies, political officials and other reformers strove to forge healthy and secular workers and citizens who actively aided them in creating a revolutionary society. Although they envisioned these New Men, Women, and Children as being more modern than their predecessors, the gender roles of these supposedly new peoples had not been significantly re-imagined from the models established in the eighteenth and nineteenth centuries. Additionally, the class and race biases imbedded in these programs seem to contradict their purported revolutionary nature and instead served to strengthen the paternalistic nature of the government.

1. Revolutionary Cultural Campaigns

Revolutionary presidents between 1910 and 1940 had a variety of goals for their administrations. While leaders in the 1910s envisioned a weak central government that allowed for local autonomy, those of the 1920s and 1930s worked to create a strong State that directed socio-economic reforms on a national scale. They also promoted a government with autonomy from the manipulation of dominant social classes, foreign countries and their investors, and the powerful Catholic Church (Wilkie 1967; Hamilton 1982). Revolutionaries hoped to strengthen the country's economy by reasserting the government's right to control resources beneath the soil, building infrastructure like roads and dams, and nationalizing key industries. Social goals included the creation of a national cultural patrimony, redistribution of land, and labor legislation that guaranteed workers the right to strike, a minimum wage, and accident compensation (Neimeyer 1974; Vaughan 1997; Fallaw 2001a).

The long-term success of any of these projects also required the creation of a modern citizenry. Ordinary people would need to learn to be active participants in, and avid supporters of, the new revolutionary regimes. They would have to adopt the values of hardwork and thrift. They should think of themselves as Mexicans, as opposed to Yaquis (native peoples from the state of Sonora who strongly resisted the central government and assimilation into Mexican society) or even Sonorans. They ought to be free of disease and sober. Above all, these New Men, Women, and Children would be educated, secular, and rational (Knight 1994; Palacios 1999; Vaughan and Lewis 2006; Pierce 2008). Of course, none of these projects were particularly new: the late-eighteenth century Bourbons, the mid-nineteenth century Liberals, and the late-nineteenth century Porfirians had carried out similar modernizing and moralizing projects (Piccato 1995; Viqueira Albán 1999; Bliss 2001; Toxqui 2008).

Like their predecessors, revolutionary political leaders and experts in the fields of education and public health claimed that their constituents were anything but modern. These reformers reported alarming rates of tuberculosis, venereal disease, and alcohol consumption. These problems supposedly led to lower production rates in the workplace, crime, and the eventual degeneration of the entire race. Nor could sickly and drunken men and women contribute to the political process, economic development, or the repopulation of the nation (Urías Horcasitas 2001; Bliss 2006; Pierce 2008).

As in the past, the Catholic Church was blamed for many of these perceived deficiencies. Public health experts noted that Catholic morality made sexuality a taboo topic, and young people entered into physical relationships without knowing the potential health hazards. Revolutionaries asserted that adherence to religious doctrine discouraged the adoption of Western medicine that might prevent diseases like tuberculosis and yellow fever from spreading. Temperance advocates also claimed that frequent religious festivals provided people with the excuse to imbibe on a regular basis. In general, anti-clerical leaders accused the Church hierarchy of collaborating with landed elites, industrialists, and foreign interests to exploit the nations' urban and rural workers (Bliss 2001; Bliss 2006; Pierce 2008).

It is difficult to know how extensive these problems actually were. Although reformers frequently cited statistics to argue that the nation had an excessive number of sickly and inebriated citizens, the figures they used were often outdated—in some cases they were decades old. Many experts relied on studies from Mexico City to draw conclusions about the country as a whole. Additionally, terms like diseased, alcoholic, and religious fanatic are subjective and can be defined differently according to one's values. Bureaucrats often came

from an urban, upper-middle class, and white or *mestizo* background (people of mixed heritage that comprised the majority of the Mexican population). They valued cleanliness and equated a dirty home with moral laxity. They either did not realize or ignored the fact that the ability to keep a disease-free house often depended on whether one lived in an urban or rural locale, as well as his or her socio-economic status. Similarly, reformers and their social peers valued moderation and order, so they labeled frequent public drunkenness as evidence of alcoholism. Other cultural groups, like urban workers or peasants of either indigenous or mixed heritage, defined acceptable alcohol use in different ways. Poor city-dwellers found taverns to be ideal places to relax and socialize. Ironically, regulations that limited the hours of these dispensaries forced people to drink as quickly as they could. Native peoples often valued alcohol for its transcendental qualities in religious ceremonies and, in this situation, they imbibed precisely to become intoxicated. Rural people in central Mexico frequently drank *pulque*, a fermented beverage made from the maguey plant, to replace a lack of potable water, a steady supply of food, or medicine. These people would certainly not have labeled themselves as drunkards (Mitchell 2004; Pierce 2008). Nor is it at all clear that the Catholic Church ought to be blamed for encouraging the spread of disease, superstition, and vice. Although religion certainly made it difficult to have discussions about sexuality and venereal disease, Catholic schools across the country taught lessons about hygiene using the latest scientific knowledge, the Unión de Damas Católicas Mexicanas—or the Union of Mexican Catholic Ladies—wanted to reform and rehabilitate prostitutes, and religious leaders discouraged drinking and gambling (Schell 2003; Bliss 2007; Pierce 2008). For these reasons, it makes more sense to simply work with the notion that political officials and other reformers believed that bacteria, the Bible, and the bottle plagued the nation, whether that belief was justified or not.

To create healthy citizens, programs were designed not only to stop disease from spreading, but also to teach people how it spread, in the hopes that new illnesses would not be acquired. For instance, public health experts, at times allied with the Rockefeller Foundation, an American philanthropic organization, strived to eradicate diseases such as tuberculosis and yellow fever by killing mosquitoes, vaccinating people, and inspecting homes for clean water supplies (Solorzano 1994). These doctors and researchers also worked with teachers to educate children about hygiene through lectures, games, and other projects. The students, in turn, would pass on their knowledge to their parents. Sexual education for adults was seen as a vital step in reducing the rates of syphilis. To this end, the Department of Public Health distributed descriptive pamphlets, screened informational films, and gave talks in public locations. Those already infected could visit clinics that specialized in treating venereal diseases, while prostitutes were subject to increased regulation of their business as well as government attempts to cure their ailments and reform their supposed vices (Bliss 2001; Bliss 2006).

National and state governments employed even greater resources to mold constituents into non-religious beings. The Constitution of 1917 declared that education not only be obligatory and free, but also secular. To this end, President Álvaro Obregón created a federal Department of Public Education in 1921. Public teachers across the country taught students that priests had long exploited their people and that religion threatened the success of the Revolution. State and local politicians and branches of the official political party (the Partido Nacional Revolucionario—PNR—from 1929–1939 and the Partido de la Revolución Mexicana from 1939–1946), as well as private organizations like Masonic lodges and anti-clerical clubs, furthered teachers' work by distributing propaganda. To pass this message along to their parents, children performed plays that depicted religious figures as

drunk and abusive. Teachers also led expeditions to local churches to smash and burn statues of saints. In many states across the country, governors sponsored Cultural Sundays or Red Sundays that usually consisted of anti-clerical speeches, temperance plays, or sporting events. Leaders hoped that these events would encourage people to replace sacred time with secular and healthy pursuits (Becker 1995; Bantjes 2006).

The methods used in the national anti-alcohol campaign varied over time, and in large part depended on the type of government in power. Presidents Francisco Madero and Venustiano Carranza, from 1911 to 1913 and 1914 to 1920 respectively, expressed a concern with alcoholism, but their passive outlooks on the role of the presidency (they did not believe it was the executive branch's job to engage in socio-economic reform) and the economically and politically weak nature of their administrations prevented them from accomplishing much. Furthermore, the Constitution of 1917 barred Carranza and his successors from mandating a prohibition of alcohol, and instead authorized the Department of Public Health, as well as national and state legislatures, to deal with the issue (Pierce 2008). Indeed, Madero and Carranza encouraged governors, mayors, legislators, and bureaucrats to combat alcohol abuse. Two governors, in particular, presided over states with restrictive legislation. In Sonora from 1915 to 1919, Plutarco Elías Calles banned all types of intoxicating beverages, even beer, in an effort to improve morality and work ethic. Governor Salvador Alvarado of Yucatán restricted drinks with over 5 percent alcohol content from 1917 to 1919. Indeed, these governors combated alcoholism in a more direct manner than presidents did (Fallaw 2001b; Pierce 2008; Pierce 2009).

Between 1920 and 1932, Presidents Obregón, Calles, Emilio Portes Gil, and Pascual Ortiz Rubio achieved more in the battle against alcohol abuse. These presidents led active administrative programs, but they were limited by administrative and financial weaknesses, so they often relied on fairly indirect methods in this battle. For most of the 1920s, presidents and bureaucrats strengthened tax codes that made intoxicants more expensive, passed regulations requiring beverages like *pulque* to adhere to sanitary standards, and began propaganda and educational campaigns in schools (Pierce 2008; Pierce 2009). Several governors across the nation, including Portes Gil of Tamaulipas from 1925 to 1928, Lázaro Cárdenas of Michoacán from 1928 to 1932, and Tomás Garrido Canabal of Tabasco from 1928 to 1934, assisted the president by passing restrictive legislation or working with teachers to promote the benefits of sobriety (Martínez Assad 1979; Boyer 2003; Pierce 2008). In spite of the growing strength of the federal government, other governors, mayors, and policemen continued to ignore or openly thwart presidents' calls for the restriction of alcohol, often because they benefited economically from promoting vice (Pierce 2008; Marak 2009).

The most significant step in this era was taken in 1929, with Portes Gil's creation of the DAA.[4] This body combined delegates from the Departments of Industry, Commerce, and Labor, Public Health, Education, and many others. The DAA, which was led for most of its history by Luis Franco, used mostly cultural methods to convince the public that chronic intoxication posed a grave threat to its health. Teachers lectured on the subject, had students produce temperance-themed plays, songs, and art works which were then redistributed and displayed around the nation, and organized anti-alcohol leagues for mothers and children to join. An anti-alcohol parade was held many years, beginning in 1929, on November 20, the anniversary of the Revolution. These parades were meant to impress on student participants, as well as observers, that the achievement of sobriety was as revolutionary a goal as the equitable division of land (Pierce 2008).

The anti-alcohol campaign accelerated from 1932 to 1940 under Presidents Abelardo Rodríguez and Cárdenas, as their governments had achieved enough strength to begin to carry out their visions of an active State. The DAA and the Department of Public Education continued to use cultural techniques, like parades, educational programs, radio lectures, and films to reach people (Lewis 2005; Pierce 2008; Pierce 2009). Three major events were the First and Second Children's Anti-Alcohol Assemblies of 1936 and 1940, respectively, and the Primer Congreso Nacional Antialcohólico, or the First National Anti-Alcohol Congress, of 1936. These conferences brought together hundreds of children, intellectuals, businessmen, and international diplomats who supported the cause of temperance. Panels covered dozens of different political, economic, and social topics, and representatives put together lists of suggestions that were presented to the governing body of the DAA. These presidents also began to supplement such cultural methods with more direct strategies. For instance, Cárdenas himself passed presidential decrees that limited the sale of alcohol on weekends and festival days in working-class and some indigenous communities in 1937 and 1939. Nor did Rodríguez, Cárdenas, and DAA officials simply hope that people would follow national and state-level legislation. They created corps of inspectors beginning in 1935 that monitored alcohol dispensaries in Mexico City and surrounding villages, ensuring that they had the proper license and that the drinks they sold were sanitary (Pierce 2008; Pierce 2009). These presidents and bureaucrats also followed up on letters written by concerned citizens who complained about cantinas in their neighborhoods or about corrupt officials that allowed alcohol to be sold clandestinely. In fact, when Cárdenas visited individual governors, such as Florencio Palomo Valencia of Yucatán and Román Yocupicio of Sonora, to deal with issues of land reform and political cooperation, he also talked to them about alcohol policies, insisted that they obey the law, and sponsored healthy, sober festivals in the towns he visited (Fallaw 2001a; Pierce 2008).

Assessing the success of the public health, anti-clerical, and anti-alcohol campaigns is a difficult task. Historian Alan Knight has argued that these cultural revolutionary projects were abject failures rejected by a "recalcitrant people" (Knight 1990; Knight 1994). Certainly, enthusiastic reformers and political leaders were challenged by state and municipal figures, even Public Health inspectors, who broke prostitution and alcohol laws with impunity and benefited from them economically (Fallaw 2001b; Lewis 2005; Pierce 2008; Marak 2009). Ordinary people, of all social classes, also resisted laws that regulated their private lives and they forced revolutionary leaders to focus their attentions elsewhere. The best example of this is the Cristero War of 1926 to 1929, where citizens took up arms against the government to resist restrictions on the Church and religious practice. The result was a relaxation in anti-clerical policies (Bliss 2006; Meyer 2006; Pierce 2008). But not everyone saw vaccinations, secularism, or sobriety as impositions. Some families willingly opened up their houses to Public Health officials and demanded yellow fever eradication campaigns in areas where they had not yet been implemented. Thousands of men and women across the country formed anti-clerical and temperance leagues, both at the behest of the State and for independent reasons. They gave lectures, distributed informative flyers, and destroyed images of saints, much as federal officials did. Members of labor unions, Masonic lodges, and agricultural cooperatives also strove to eradicate alcohol abuse in their communities by writing letters to newspapers and their leaders, demanding that cantinas be closed or moved away from their children's schools (Solorzano 1994; Olcott 2005; Bantjes 2006; Mitchell 2007; Pierce 2008). In other words, it seems more accurate to assert that although the cultural

campaigns did not succeed in eradicating bacteria, the Bible, and the bottle, neither should we see a Leviathan State imposing its will upon a hapless population that resisted all attempts to alter their sanitary, religious, and drinking habits.

2.   New Men, Women, and Children

The anti-alcohol campaign helps to illustrate leaders' understandings of gender, class, and race, and questions how revolutionary these notions were. The temperance-related propaganda distributed and the legislation passed between 1910 and 1940 were not intended for the entire nation. Indeed, although reformers recognized that people of all backgrounds had the potential to abuse intoxicating substances, they targeted lower-class and indigenous men as the nation's problem drinkers. The vast majority of images, songs, plays, and other materials generated by the anti-alcohol campaign depicted male urban and rural workers as drunk and in need of help. For instance, in 1929 President Portes Gil suggested using the following slogan to advertise the new official temperance movement: "Worker: spend in books what you would otherwise spend on alcohol. The books will teach and educate you and alcohol will only make you a brute and kill you."[5] Laws reinforced the notion that it was working-class and indigenous men who ought to be reformed. Cárdenas's 1937 and 1939 decrees were aimed specifically at keeping intoxicating beverages out of the hands of workers and natives (Pierce 2008).

Reformers truly believed that male *obreros* (urban workers), *campesinos* (peasants), and *indios* (Indians) drank more than women, *mestizos*, and the upper and middle classes. Experts claimed that male identity was intimately connected to alcohol consumption and as they mistakenly believed men were more active in the public sphere than women, they were also more likely to be lured into a life of vice. Similarly, a 1930 study by Dr. José Mesa Gutiérrez of the Pathological Institute at the Hospital of San Andrés, found that 76 percent of the 3000 lower-class cadavers he autopsied had perished from an alcohol-related cause. (He does not explain how he determined the socio-economic status of these bodies.) A few other temperance advocates throughout the 1920s and 30s, including the teacher Antonio Gutiérrez y Olivares of the Casa del Estudiante Indígena, Secretary of Public Education Ignacio García Téllez, and Ambassador Moisés Sáenz, an influential anthropologist concerned with indigenous policies, also argued that this disease was a serious threat to the health and well-being of native peoples. In their studies and assertions, these men either implied or claimed that alcoholism was more prevalent in male workers and natives than other people (Dawson 2004; Pierce 2008).

Temperance advocates did occasionally accuse urban and rural poor women of being problem drinkers. They believed that peasant women, thanks to their supposed lack of hygienic education, drank *pulque* or other intoxicants while pregnant and gave babies the same substance. They begged these women to abandon their bad habits, lest they condemn their offspring to a life of addiction and incarceration. Reformers also noted that urban working-class women frequently earned a living as waitresses in bars, restaurants, and brothels. They accused these women of drinking and using their sexuality to ensnare men in a life of vice. Thus, regulations throughout the revolutionary period were aimed at keeping women from working in or even entering any establishments that served intoxicating beverages. For the most part, though, these examples were perceived to be merely exceptions to the "rule" of male drunkenness (Bliss 2001; Pierce 2008).

Targeting these groups as problem drinkers was not new in the 1910s, '20s, and '30s. Reformers in the eighteenth and nineteenth centuries had also blamed poor and

indigenous men for a variety of social problems. One thing that set the revolutionaries apart from their predecessors, though, was their insistence that the temperance movement (along with the public health and anti-clerical campaigns) was not an element of social control, but rather an altruistic program designed to help the masses resist exploitation. As Portes Gil explained in 1929, alcohol had been the most effective tool of employers and other "exploiters" to keep the poor subjugated.[6] In order to reverse this process, leaders of the PNR insisted in their Six-Year Plan, published in 1934, that they would combat alcoholism even more fiercely than they had in the past.[7] In the utopia that revolutionaries envisioned, sobriety would aid in social mobility (Piccato 1995; Viqueira Albán 1999; Pierce 2008).

Indeed, if men were to be the subject of reform, leaders solicited the help of (most) women and children in achieving this transformation. Females were constantly barraged with messages in magazine and newspaper articles, radio programs, and festivals asking them to actively participate in the anti-alcohol campaign. Portes Gil in 1929 exhorted "Women: for your husbands and your sons, for your brothers and for your fathers, combat alcoholism."[8] Children were taught through lessons, images, plays, and parades, many of which they created in class, that they ought not to imbibe, now or in the future, and that they ought to convince their fathers to adopt a sober lifestyle as well. Teachers and school inspectors, *ejidatarias* (women who lived on communal land granted by the revolutionary government), and federal employees were asked to organize themselves, and other women and children they came into contact with, into temperance leagues that would influence their male relatives to choose sobriety, plan festivals, and convince local politicians to close cantinas (Albarrán 2008; Pierce 2008).

Political leaders and bureaucrats targeted women and children because they believed that they were those most affected by alcohol abuse. Countless images showed mothers and their offspring cowering in a corner, while their drunken husbands and fathers leered over them wielding a chair, bottle, or knife. Plays depicted men spending their entire paycheck at a cantina, while their family was at home, starving. Studies asserted that alcoholic fathers begat children and grandchildren who also became problem drinkers, or were infertile, disease-ridden, unintelligent, sexually promiscuous, or violent. Truly, as these sources claimed, women and children were the victims of chronic intoxication (Pierce 2008).

In the process of creating New Men, Women, and Children who were healthy, secular, and sober workers and citizens, revolutionaries also started to rethink the rights and responsibilities of these groups. They began by re-envisioning male gender roles. For instance, temperance reformers claimed that men should no longer demonstrate their masculinity through intoxication, violence, or unfettered sexuality. The song mentioned in the introduction, "The Shame of Alcohol," advised listeners that "He who yells the most is not brave, so I assure you, alcohol advises you poorly."[9] President Portes Gil in 1929 further claimed that drunkards could not live up to their manly duties: "The alcoholic will never be: a good son, a good father, a good husband, nor a good citizen."[10] Rather, "true" men were characterized as sober, socially responsible, and caring husbands and fathers, as an image from a 1929 booklet in part illustrated. It features one youth who is choking another, labeled "vices." The caption explains, "Young man: do you want to be a very manly man? Have you thought about what it means to be a man? It is not to be a murderer, nor to know how to use guns. Nor is it to defeat an army. Nor is it to be a strong brute. [A man] is he that defeats his vices and passions. He that does not permit his low nature to cloud his life nor the life of his fellow men. That is a man."[11]

Only pacifistic, sober patriarchs could earn the designation of an honorable citizen (Vaughan 2006; Pierce 2008).

Reformers also wanted to modify female gender roles. They erroneously believed that in the past, women had been relegated to the domestic sphere with no input into the world beyond their hearths. Revolutionary women would use their authority in the home to help forge the new nation. As educational opportunities had expanded, they would apply their knowledge of the domestic sciences to cook healthy food, keep their houses sanitary, and save family resources. Their supposedly superior morality would not be dedicated to the Church, but rather to convincing their loved ones not to imbibe. As mothers, they would strive to raise educated, modern children who would grow up to be the future leaders of the nation. In many ways, women were empowered to be agents of the State (López 2000; Vaughan 2006; Pierce 2008).

Children's roles were re-envisioned, as well. No longer were young people conceived of as merely half-grown adults with little say in the world around them. Rather, they were to be active participants in the Revolution, just like their parents. Classroom lectures, radio programs, and magazine articles taught them about the horrors of an alcoholic and disease-ridden life and exhorted them to remain sober and healthy as adults if they wanted to achieve their goals. Children were also asked to convince their fathers not to drink and to remind these men that every cup of alcohol represented one fewer piece of bread, pair of shoes, or set of school books that their offspring could have. But these youth were to get involved in even more significant ways: by marching in choreographed anti-alcohol parades and performing anti-clerical plays for the larger community, joining temperance leagues that would advocate for the closure of bars, and attending conferences where they could discuss with their peers the problems of the nation (Vaughan 2006; Albarrán 2008; Pierce 2008). These activities helped many children to develop identities as political actors. In doing so, leaders hoped, these young people would grow up to be New Men and Women themselves.

Contrary to revolutionaries' assertions, the reason for these updated roles was not merely altruistic; it had much to do with the State-building project which aimed to strengthen the government's authority and weaken that of elites, the Church, and foreign powers. As alcohol consumption supposedly provoked violence, leaders hoped that sober men, and especially soldiers, would be less prone to express potential frustrations with the revolutionaries through armed insurrection. If alcohol were prohibited on election days, as it often was, then these new citizens could better participate in the fragile political system. Reformers believed that temperate and disease-free men and women would be more productive workers and would aid economic development. By encouraging women to join hygiene, anti-clerical, and anti-alcohol leagues connected to the government, officials also hoped that they would be separated from the influence of the Church. Active children would learn these same values, ensuring that the goals of the Revolution would continue to be achieved for generations (Knight 1994; Palacios 1999; Pierce 2008).

One has to wonder how truly new these New Men, Women, and Children were supposed to be. Although reformers advised men to adopt the traits of sobriety, responsibility, and nonviolence, they were still to be patriarchs with a great deal of authority over their wives and children. Women were to aid the government in reconstruction, but they were still to be wives and mothers first. Furthermore, there was little legislation that reflected the supposedly re-imagined gender roles. While President Carranza helped to pass a law allowing for divorce in 1917, men could remarry sooner than their ex-spouses

could. Nor were women extended suffrage until 1952, more than a decade after the Revolution ended (Deutsch 1991; López 2000; Buck 2007; Swedberg 2009). Indeed, these discrepancies were mirrored in the overall structure of the anti-alcohol campaign. Although the DAA called for so-called victimized women to lead the crusade to create a sober nation, the organization was headed by a man—Franco. Very few women even sat on the advisory board of the group. It seems clear that officials and bureaucrats reformed traditional notions of gender, but they did not revolutionize them. The bourgeois ideal of domesticity had not been erased (Pierce 2008).

Nor did revolutionaries' class and racial biases seem all that revolutionary. Images and other forms of propaganda depicted lower-class and indigenous men as contributing to the nation's decline, while the country's saviors were frequently shown to be middle-class whites or *mestizos*.[12] One 1937 photograph shows an alcohol inspector in Mexico City, surrounded by interested onlookers, watching a man pour out a barrel of *pulque*. The inspector—tall, fair-skinned, and dressed in a suit—appears to come from an urban, middle-class, and *mestizo* or white background. The other man that the inspector literally looks down upon has a darker complexion and wears the sandals and plain white breeches typical of *campesinos* and some *indios*. Similarly, although native and poor individuals were encouraged to join temperance leagues, they do not seem to have been incorporated into governing bodies. Indeed, the Chief of the Department of Public Health, Dr. José Siurob y Ramírez, in 1936 suggested that anti-alcohol lecturers ought to be trained in indigenous languages to ensure that more isolated groups would be able to understand the DAA's message. Although Siurob's idea indicated an interest in reaching out to minority populations and not just ignoring them as eighteenth and nineteenth-century leaders had done, it also overlooked the fact that Yaqui, Maya, and Tarahumara people, among others, who already knew their own languages, could have joined the DAA as lecturers. It is likely that these men and women would have had more success than *mestizos* in promoting sobriety in their communities. In matters of race and class, as in matters of gender, the urban, middle-class, white and *mestizo* reformers set up their own culture and ideals to be imitated, and allowed for little input by the people they sought to change (Dawson 2004; Pierce 2008).

In fact, in the campaigns to create New Men, Women, and Children, the revolutionary government acted in a paternalistic manner. Leaders extended the power of the State to regulate even citizens' private lives. Officials sought to tell men how to treat their wives and women how to raise their children. They sought to redirect leisure time from the Church and the cantina to the library and the sports field. They tried to change lower-class and indigenous culture to fit a middle-class *mestizo* mold that emphasized domesticity, thrift, and morality and they did these things without much popular input. Although regular people resisted these measures in a variety of ways and perhaps precipitated their failure, federal officials certainly attempted to completely remake their constituents (Bliss 2006; Sanders 2007; Pierce 2008).

The 1938 booklet, *¡Hermana Campesina!* (*Sister Peasant!*), written by Dr. Celia A. De Reyes del Campillo, was distributed to peasant women to teach them how to be better mothers and wives. The reader is told that "you … as mother that you are or surely will be, need to guide your children down the road of health."[13] The pamphlet provides information about how to keep their homes and children clean and free of disease. Reyes del Campillo advised women to follow these scientific precepts and reject superstitions about pregnancy and illnesses. She also recommends that they never marry an alcoholic man, "for the man that is drunk always has his nerves altered, his character is sour and

insupportable; the smallest thing offends him … he becomes stupid, rude by the smallest word that is said. He always loses his shame and mistreats his family."[14] By keeping their homes clean and avoiding superstitious and drunken men, they could fulfill their obligations "to procure the physical and moral well being of [their] children, so that the Mexican race will be great and blessed."[15]

¡Hermana Campesina! was typical of revolutionary propaganda. Thousands of other pamphlets, images, and plays issued by the government between 1910 and 1940 reminded working-class and indigenous Mexicans of the importance of rejecting bacteria, the Bible, and the bottle. These sources were intended to create New Men, Women, and Children. They urged men to stop visiting prostitutes, drinking, and otherwise mistreating their families, and instead be pacifistic and hard-working fathers. Children were invited to help construct the revolutionary present and instructed how to be happy, well-adjusted adults in the future. Women were told to redirect their morality from the Church, and in conjunction with a new-found knowledge of health and hygiene, guide their husbands, children, and the entire Mexican race in fulfillment of these goals. However, in spite of revolutionaries' assertions to the contrary, these seem to be only slightly updated versions of eighteenth and nineteenth-century, bourgeois notions of gender: men were still to be fathers with a great deal of authority and women remained wives and mothers whose lives centered around the home. Revolutionaries' notions of race and class seemed fairly outdated, too, for they blamed the nation's supposed problems of venereal disease, religiosity, and alcoholism on working-class and indigenous peoples. In each of their cultural campaigns, the revolutionary government worked in a decidedly paternalistic way that resisted input from the citizens it was trying to create.

3.   Notes

1   "La vergüenza del alcohol," 20 November 1929, Archivo General de la Nación, Fondo Archivo Particular, Emilio Portes Gil, Caja 34, Expediente 80/54.

2   "La lucha de la mujer contra el vicio del alcohol," 25 April 1930, Archivo Histórico de la Secretaría de Salubridad y Asistencia, Fondo Salubridad Pública I, Sección Servicio Jurídica, Caja 18, Expediente 10.

3   Program, Primera Asamblea Infantil Antialcohólica, 28 September-3 October 1936, Archivo General de la Nación, Fondo Administración Pública, Lázaro Cárdenas del Rio, Expediente 553/11.

4   In 1929, the name of the body that was created was the Comité Nacional de Lucha contra el Alcoholismo, or the National Committee for the Struggle against Alcoholism. This group changed names several times throughout its history; for simplicity's sake, I will refer to it by its final acronym, the DAA. For more information on the name changes, see: Pierce 2008, Chapters 1 and 2.

5   Circular, 22 April 1929, Archivo General de la Nación, Fondo Administración Pública, Emilio Portes Gil, Expediente 3/669, Legajo 2.

6   Ibid.

7   Partido Nacional Revolucionario, *Plan Sexenal del P.N.R.* (Mexico: n.p., 1934).

8   Circular, 22 April 1929, AGN-FAP-EPG, Exp. 3/669, Leg. 2.

9   "La vergüenza del alcohol," 20 November 1929, Archivo General de la Nación, Fondo Archivo Particular, Emilio Portes Gil, Caja 34, Expediente 80/54.

10   Circular, 22 April 1929, AGN-FAP-EPG, Exp. 3/669, Leg. 2; "Decálogo antialcohólico," *El Maestro Rural* 11, no. 9 (September 1938): 34.

11   A. Gutiérrez y Oliveras (1929), *El sepulturero de la raza latinoamericana o el cantinero y la conquista pacifica* (Casa Unida de Publicaciones), 61.

12   Photograph, Department of Public Health memorandum to Cárdenas, 7 January 1937, Archivo General de la Nación, Fondo Administración Pública, Lázaro Cárdenas del Río, Expediente 553/11.

13   C.A. De Reyes del Campillo (1938), *¡Hermana Campesina!* (Departamento Autónomo de.Prensa y Publicidad), 1.

14   Ibid., 18.

15   Ibid., 1.

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Environment and Environmentalism

EMILY WAKILD

Historians and chroniclers of the Mexican experience have long noticed the intermingling of nature and humanity at critical junctions in the region's past. The island city of Tenochtitlan enthralled Bernal Díaz who described the floating gardens and intricate causeways that meandered through the lacustrine setting.[1] On the eve of independence, Alexander von Humboldt heaped praise on the wealth of extant natural resources, especially the mines of Guanajuato and the vanilla in Veracruz.[2] In the later nineteenth century in Chiapas and the Yucatán, ancient Mayan temples were identified under such dense vegetation that they had to be "unearthed," and such excavations led to recurrent (and overly rigid) explanations for the collapse of the Maya civilization marking the decline as a parable of environmental catastrophe.[3] Even the famed United States conservationist, Aldo Leopold, remarked on the integrity of Chihuahua's high montane ecosystems that supported large predators, including wolves and bears, in the 1940s.[4] Observers of the Mexican environment repeatedly found themselves overwhelmed by the nature they encountered and their remarks remind us of the constraints the natural world places on humanity.

Yet descriptions of natural attributes alone hardly constitute environmental history. Rather than an austere catalog of waterways or plant species, environmental history poses social and cultural questions and is distinct from its predecessor, natural history. An environmental approach to history adds a consideration of the power that resides outside human control and interrogates the interactions between social and natural systems over the long term. Such an approach to the past allows recognition of how humanity depends on and relates to natural systems. In doing so, environmental history helps account for contingencies that remain beyond the scope of traditional histories. This chapter points to some fruitful arenas for understanding the relationships among the realms of political, economic, social, and cultural history and the natural world that hosts these contestations.

The history of the Mexican environment has been one of use and conservation in various combinations. Although the subjects of many environmental histories—from

soils to salamanders—pay little or no attention to the national or political boundaries that frame historical writing, social boundaries shape landscapes and map human identity. Major areas for investigation include the topics of energy, transportation, agricultural commodities, industrial production (and waste), urban environments, forests, waterways, climate change, popular culture, and environmental organization. Some of the most fruitful arenas for refreshing interpretations of the past through an environmental lens involve the dynamic interactions among these discrete topics.

In addition to highlighting topical and thematic areas, this chapter narrates the passage of time. The environment has played a subdued but significant role in each of the region's eras. Changing social, economic, and political attitudes towards the environment have connected and divided various social groups at different junctures. In the nineteenth century, challenges associated with the tendency to both emulate and denounce European influence reshaped the nation's urban geography and rural landscape. In the early twentieth century (1910–1940), revolutionary aspirations built a consciousness of conservation into the aims to rebuild society, in part by remaking the countryside into a productive and rational landscape. Alongside federal attention to rural communities, reformers fostered an adoration of the natural world that intertwined with artistic representations of the revolution. In the middle of the twentieth century (1940–1980), the dire realities of increasingly rapid modernization caused previous restrictions to be set aside for newly prioritized urban industrialization. The ways in which these shifts sowed and uprooted natural ecosystems demonstrate how fleeting protections can be and how large a footprint social and economic changes can create. In the neoliberal period (1980–present) attempts to balance the inadequacies of prior development policies with the constraints—of the market and of the natural world—produced a set of dilemmas yet to be reconciled.

Nineteenth-Century Challenges

The early nineteenth century presented a set of formidable political and socioeconomic challenges that related to the environment. Foremost among these was the newly independent country's inability to create the conditions necessary for stable political rule or economic certainty. The difficult transition to self-governance resulted in repeated interruptions of rule from revolutionary mobilizations (starting with Hidalgo's revolution in 1810), internal strife (especially the clash of ideological visions between liberal and conservative interests that reached its apogee in the Reforma wars 1855–1861), and foreign intervention (especially by the United States 1846–1848 and France 1862–1867). These national events had environmental consequences and shaped the use of resources in the decades that followed. John Tutino argues that the capacity of a community to mobilize for revolution was grounded in their ecological autonomy. That is to say communities who could generate their sustenance independently retained the ability to organize a force to promote their agenda.[5]Crude environmental determinism has no place in this explanation as Tutino notes that the more ecological security a community preserved, the less likely they were to revolt. Such a perspective nevertheless broadens the causal factors and context of political events in important ways. Foreign interventions likewise had environmental consequences, none more stinging for Mexico than the immediate loss of land in the north, first by Texas's declaration of independence and then through the 1848 treaty of Guadalupe Hidalgo signed after defeat in the U.S. war. The vast cession of land included the present-day U.S. states of California, Nevada, and Utah, as well as parts of Colorado,

Arizona, New Mexico, and Wyoming. The loss deprived Mexico of more than 500,000 square miles or more than half of its territory (two thirds if Texas is included) and a variety of resources that might have been used to get the economic house in order. With that loss, Mexico also ceded geographical features that would become emblematic U.S. National Parks several decades later (including Yosemite, the Sequoias, Grand Canyon) and, more devastating for the depleted treasury, the gold mines of California discovered just days before the transfer. Instead, the transfer drew the modern border line and created a political divide where no natural boundary existed.[6] This chasm would continue to expand and tug at the seams of the two countries while deepening the complexity of the lives of residents. If war was the midwife of Mexico's modernity, nature was its mother, bearing the burden and providing energy for growth.

The inability to cohere after independence remained a persistent feature of nineteenth-century governments. A frequently cited impediment to unity was the lack of communication channels available to merchants, politicians, and ordinary people. The geographical obstacles (especially precipitous mountains, gaping canyons, and impenetrable forests) discouraged commerce and communication. The lack of navigable rivers to serve as conduits of travel, trade, and triumph stunted many development projects and impeded rapid transit.[7] The land itself relegated trade to the backs of sturdy Indian porters or steady mules, thus limiting the large scale extraction of heavy and fibrous natural goods.

The three decades after independence saw fifty presidents, but the last three decades of the century had one president (with a four year gap). The magnitude of environmental change unleashed by such stability altered the land as never before. Stability foremost proved conducive to laying the foundations for national transportation systems. Extractive industries had to wait for the accomplishment of these programs' forging of railroads and crafting of roads; as historian John Coatsworth has explained, "Mexico is a country where geography conspires against economy."[8] The railroads came with a fury once the politics stabilized, and came to eclipse spending and upkeep on highways, which peaked in their extension for a half century in 1877. In the 1880s, investors funded nearly 20,000 kilometers of federal railway and perhaps half as much in commuter and feeder lines under state and local jurisdiction.[9] Rails begat new roads, and both amplified mining, cotton, sisal, rubber, livestock and other types of production which could more efficiently build large scale operations and reach markets from one side of the country to the other.[10] During the 1870s and 1880s American railroad financiers supported the Mexican National Railroad and provided the investment necessary to crisscross the nation in iron. In its totality, Díaz oversaw the construction of a network of roads and railroad concessions that exceeded 8,200,000 acres of right-of-way lands.[11] It is no surprise then that railroad construction between 1877 and 1884 was closely linked to the usurpation of Indian village property and the public domain, a reality that reverberated into later demands for social justice and decrials of foreign economic domination.

During the late nineteenth century, the capacity and economic incentive to cut trees outpaced nature's ability to reproduce them. Railroads required *durmientes*, or ties, as well as clearing forests to cut through topography and construct flat roadbeds. The rapid clearing and regular need to replace ties caused one forester to remark that mahogany—a hard wood particularly resistant to decay—should be used instead of pine trunks, as the latter were becoming scarce.[12] While much land remained forested and clearance was not unilateral, cut-over hillsides shrouded the capital city and parts of southern Mexico. Tropical forestry policies proved an extension of liberal reforms in that they turned forested lands over to the state and then privatized them. This amplified the exploitation of

tropical woods.[13] As Jan de Vos eloquently demonstrates, the Selva Lancandona in Chiapas came under new exploitation in 1822 when upon independence, provincial administrators requested authorization to extract lumber and produce tar on behalf of the nation. He argues that the defenseless victims of this modern conquest were the trees, rather than indigenous communities, especially mahogany and cedar. The exploitation began at the hands of a dozen capitalized and competent loggers from the neighboring state of Tabasco, whose work after 1880 turned them into powerful logging companies propelled by the liberal regime of Díaz.[14] The internal colonialism Vos points to, and the social and environmental dynamics of this extractive enterprise, present an important early chapter in the destruction of tropical forests.

As the forests were dismembered, many of the felled trees became railroad ties stitching together cities, and stretching through the countryside as conduits for trains. Other branches and logs became the backbone of urban construction, the framework for furniture, altars, and providers of heat and cooking fuel for women charged with domestic duties.[15] The flow of fuel into the cities marked another trend of environmental consequence: the renewal of urban spaces in a modern fashion. Urban renewal by the liberal regimes pointed to a tortured relationship with Europe. On the one hand, they sought revitalization of the cities, especially the capital, to create distance from the colonial past as a subjugated space of Spanish rule. On the other hand, new designs drew explicitly on the modern cities of Paris and London for redesigned boulevards, statue gardens, and city parks.[16] Elites subscribed to what has been called the "Porfirian persuasion," or the fondness for European culture and consumables.[17] Such proclivities spilled over into the landscape, especially of the capital city. The scientific rationale for promoting hygiene and green space in the city drew upon the works of Europeans like Louis Pasteur and it filtered into these schemes through Porfirian *científicos*. Baron Haussmann's boulevards in Paris both segregated nature and regimented the lives of human residents, and Mexico City's Paseo de la Reforma sought to follow this example. Furthermore, Haussmann's persona, as the bureaucrat, the expert, and the urban planner, set an enviable standard for Porfirians.[18] Officials created more manicured gardens, tree-lined avenues, and public parks during the Porfiriato than at any other time in the capital's history, and these green spaces reflected a technical solution to deteriorating health in the city.[19] Another technocratic solution to the persistent urban problem of flooding involved intense investment in drainage works.[20]

The Porfirian focus on Mexico City's built environment spilled over into other landscape features. Water itself was not necessarily detrimental to a city nor was water inherently insalubrious; flooding or "disorderly" water became the problem. Attempts to control and manage the waters around the capital persisted through time—from the early Aztec dikes that divided Lake Texcoco to the Spaniard Enrico Martinez's open canal through the mountains in 1697. But no comparable project shared the ambitions and aspirations of the Grand Drainage Project that started in 1886. Hygienist Gustavo Ruiz y Sandoval's 1873 description of Lake Texcoco explained that the lake served only to accumulate waste, from fecal matter transported to the lake on carts to the organic leftovers sluiced in from tanneries.[21] Waste for a growing city proved a perplexing and constant environmental issue. The Porfirian plan proposed to rid the city of the waste by draining the water once and for all. This plan involved erecting a system of dikes and holding tanks for excess water, constructing barriers for overflow, and providing for general drainage. The plan resulted in tremendous landscape changes throughout the valley.[22] The momentous undertaking included a thirty-mile canal with four aqueducts and

bridges, a six-mile tunnel coated with brick and Portland cement, and a mile and a half cut through the mountainous terrain.[23] Rerouting infectious streams and conserving precious clean water required a firm state commitment and a significant financial investment. By completion, in 1901, the project's footprint extended well beyond its symbolic importance: the canal used 22 million bricks, 25,000 cubic meters of mortar, 1.5 million meters of lumber, and untold numbers of laborers lives.[24]

Environmental change did not progress with a mind of its own. Both use and conservation were deeply tied to intellectual currents that often swept rapidly, leaving ripples of destruction and sometimes waves of conservation. Elite concerns with getting the economic and political system on track coincided with growing scientific understanding of the natural world. This is certainly the case with social phenomena like racial theories, but it was also true of understandings of the flora, fauna, and even the climate of the country. A number of societies, dedicated to the study and understanding of different aspects of the natural world developed expertise and used this to shape state policies. Important examples include the *Sociedad Científica de José Antonio Alzate*, *Sociedad Mexicana de Historia Natural*, and the *Sociedad Forestal Mexicana*. These elite social clubs rapidly gave way to academies of science and even bureaucratic departments. The private and independent origins were undoubtedly exclusive, but important work remains to be done on how these societies influenced and sculpted policy. Academies and private groups proved catalysts for social change in that they signified the accumulation of knowledge that allowed the emergence of a new world view. In addition, the journals, libraries, and materials collected by these organizations became a secular repository of patrimony, in that they sought and protected the accumulation of measurements, data, and narratives about the changing natural world.

Engineering feats were not reserved to the cities. Economic, particularly agricultural, production expanded exponentially in the Porfiriato. The overall gross national product expanded by 8 percent and, in just one example, henequen fiber exports rose from 40,000 bales in 1875 to 600,000 in 1910.[25] This expansion belies the environmental paradoxes of the sustainability of export agriculture. Jaime Rodríguez notes that the entire national territory contains little land suitable for agriculture, with total arable soil encompassing an area less than the size of Kansas, and expansion rapidly depleted what was available.[26] In this era, land ownership became more highly concentrated, although exactly how this transpired is not clear.[27] The production of high value export agriculture expanded into formerly impenetrable frontiers, particularly Chihuahua, Veracruz, and the Yucatán, that held specialized commodities that were able to fetch prices on the world market that offset the natural obstacles to their harvest and production. At the same time, staple food production at the national level declined to a level that caused severe shortages every few years from 1892–1910.[28] Foreigners expanded holdings in tropical exports (including rubber, hardwoods, cottonseed, coconut oil, vanilla, and bananas), made possible by overlapping investments in transport infrastructure. This is not to say that Mexicans remained subservient or passive in this process, these market structures were shaped not only by national policies but also by local demands and abilities (which often played more dramatic roles in their collapse). Paul Hart has shown that transformation of industry and agriculture in the state of Morelos—the heart of sugar production—reflected a pattern unfolding elsewhere in the country. Emilio Kourí argues that the emergence of a vanilla economy in Papantla, Veracruz, reveals the complex interplay among changing geographies of production, land privatization, and export markets structures.[29] The expansion of single product export economies resulted in an

uneven landscape, one marked by tenure inequality, stripped of its diversity (both biological and in terms of support for human communities), and characterized by its subservience to a larger global economy. Nevertheless, many individuals profited spectacularly and perpetuated a system of political exclusion to prop up their positions.

Land privatization, foreign economic colonization, rapid cultural change, elite political concentration, and serious economic contraction combined to create the conditions for revolution. Into this festering wound stepped several charismatic leaders who rose through their military prowess, political promise, and echoing claims of justice to raise sympathies and mobilize followers across the nation. Elections triggered assassinations, betrayal sparked counterinsurgency, and revolts became civil war. The armed phase, from 1910–1920, gave way to a period of protracted conflict before the realization of many social aims in the 1930s. The environmental facets of this destruction—in human deaths, infrastructure destroyed, agriculture disrupted, landscapes eroded of vegetation, fields littered with bullets, and towns or villages razed—have yet to be fully accounted for by environmental historians.

Revolutionary Aspirations

In most histories, the revolution marks a turning point in social organization and commitment to an idea of justice. From an environmental perspective, much continuity persisted, even if its intentionality and willingness to spread the benefits changed. Engineers, medics, architects, businessmen, bureaucrats, politicians, and citizens in both eras dreamed of a modern nation with a vibrant economic and cultural life respected on an international level for its dedication to scientific improvements and secure governance. Yet, another strain of revolutionary thought attempted to restore what had been destroyed, or at least desecrated, before.

Revolutionaries inherited an industrializing environment, one that had scoured the landscape around Mexico City of trees (or so the foresters claimed), overplanted the most arable soils, and depleted accessible minerals. Revolutionaries then sought to correct these ills through a system of landholding that they hoped would be more just and also more productive. Calls for land reform and the resurrection (if haphazardly) of the pre-Columbian system of communal land tenure known as the *ejido*, helped to pause industrialization and agricultural expansion and then reorient it. This never signaled an end to a commitment towards the use of natural resources. Instead the revolution triggered a rising complimentary strand of thought that imagined how the systematic conservation of resources (and increased control of these, including forests, agricultural lands, waterways, fisheries, and minerals by the government) would promote their rational use. These changes appeared most forcefully during the social phase of the revolution under the leadership of President Lázaro Cárdenas (1934–1940) when he and his team of administrators demanded that use for use alone was not enough: revolutionary industrialization had to be geared towards the benefits of rural people, the accumulation of wealth in the national treasury (rather than foreign coffers), and the development of proud industries that drew on the unique endowments of the nation's patrimony.

The most dramatic template for this change came throughout the national landscape and aimed to connect forests, fields, and pastures with villages, schools, and cooperatives. To do this, revolutionary bureaucrats created a system of land reform that in important ways mirrored natural ecological systems and attempted to at least reach for a parity of natural and human systems.[30] In practice, this proved harder to construct, as

communities wrangled over land, ecological surveys of forests or water sources were slow to be completed, and obstacles such as access to credit eroded support for small scale farmers. Yet, the most successful land reform project in Latin America, one that provided stable land tenure to 800,000 campesinos, also dramatically reshaped the physical landscape by ensuring their residence on this land, if only for a generation or two. While the literature on land reform is extensive, an environmental history of ejidos might explain the results on a national scale for preventing land conversion, maintaining ecological niches, or promoting native plant cultivation.

Water and its use proved another environmental issue that could not be separated out from agriculture. In the north, the constant attempts to provision water for agriculture flummoxed planners and interested engineers. The rains proved less than cooperative and the issues that sprung from irrigating the desert—from pinkworm infestations to salinized soils—impeded the best intentions of experts intent on making land reform work.[31]

Just as water management proved intimately tied to agricultural work, the revolutionary management of forests formed an important story of human environment interaction that is just beginning to be told. Because of the revolution, forests were put in the hands of communities on a grand scale, although this is much less widely known than the reform of agricultural lands. The result was an enormous resource transfer of woods that persists today—about two-thirds of forests remain in community management hands. Cooperatives, organized nationwide by the administration of President Lázaro Cárdenas, provided incentives for campesinos, indigenous, and rural peoples to stay in the woods and seek profitable—and often sustainable—mechanisms for doing so. The story of how local for-profit use of forests, from the Sierra Tarahumara in Chihuahua to the interior of Michoacan in the 1930s, shifted to corporate control by the late 1950s is one of response to changing federal policy.[32]

The work of managing the forests was connected to larger economic and social reforms brought by the revolution, but it was also linked to intellectual currents within scientific societies that reflected a changing relationship between the social and physical worlds. Many intellectuals who rose to prominence in the Porfiriato came to hold positions of power during the social reform period of the revolution and thus inserted a dose of scientific rationality into plans for a landscape replete with social justice. This unique interplay between scientific management and social justice set the revolution's environmental policies well apart from changes in Stalinist Russia or Maoist China, for example.[33] No individual better exemplifies this contradiction than Miguel Ángel de Quevedo, a Porfirian engineer who became head of Cárdenas's newly autonomous Department of Forestry, Fish, and Game. While he displayed paternalistic and authoritarian tendencies, Quevedo also guided into place a series of forest conservation measures—from tree nurseries and national parks to a permit system for logging—that radicalized forest protection in tandem with the revolution.[34] The creation of the autonomous forestry department allowed for new legislation and a boom in protection in the 1930s that set Mexico at the forefront of conservation policies worldwide. By 1940, Mexico had more national parks than any other country in the world and was recognized by the nascent international conservation community as a leader in environmental education.[35] Mexicans also participated in numerous international conferences on wildlife, forestry, and conservation during this period.

Environmental history can provide a useful lens for reinterpreting the cultural facets of the past. Volcanoes, forests, fields, and other natural features have a prominent place in

popular culture and art. Agrarian pastorals, like those of José María Velasco in the late nineteenth century, demarcated and emphasized the contours of the central plateau, helping to create a unified template for the nation's past.[36] Diego Rivera's murals often took the volcanic peaks as recognizable landmarks and thus built on the widespread recognition of, and affinity for, these features. Dr. Atl (Gerardo Murillo) took his infatuation with the volcanoes to a personal and artistic height—he lived on the flanks of Popocatépetl for an entire season and carefully followed the emergence of the volcano Paracutín in a Michoacan field. Foreign intellectuals also came to Mexico to observe the revolution and helped cross-fertilize cultural artifacts that drew on the era's many themes. Some, like B. Traven, wrote of their experiences in novels and journalistic accounts that help reconstruct the flavor, if not the reality, of environmental changes. The popularity of Traven's novels, nine in total between 1925 and 1940, explored the parallel exploitation of indigenous peoples and the landscape in logging camps. They became as popular as Jack London's novels and were translated into fifteen languages. They also led to the classic film, *Treasures of the Sierra Madre*, staring Humphrey Bogart.[37]

Nevertheless, environmental realities cluttered these artistic views with rapidly increasing problems. The gradual accumulation of expertise in engineering that began in the Porfiriato facilitated an important transition in the nation's energy regime. Railroads were at first pulled by mules, then powered by steam (stoked by coal or wood).[38] In 1921 enough oil spurted from the tropical rainforest of the Huasteca of northern Veracruz to make it the world's third largest producer.[39] As Myrna Santiago has shown, this first site of oil extraction in a tropical rainforest—for Mexico and the world—experienced a set of overlapping changes to accommodate oil which included shifts in land tenure patterns and use and alterations of social organization. This transformation rendered the rain forest a different landscape because, "fossil fuel extraction entailed the creation of an entirely new ecology."[40] The history of oil bridges the Porfiriato and revolutionary periods because, until oil workers and political expediency forced the expropriation of the oil fields at the hand of President Cárdenas in 1938, foreign ownership linked the eras and calls into question the clean break claimed by revolutionaries. As much as there is continuity, the history of oil also signals an entirely new period for other reasons. Mexicans, like their global peers, moved into a new biological regime, one dominated not by energy from the sun but instead energy from beneath the soil.[41] This created seemingly limitless possibilities for energy use—from electricity to automobiles, industrial agriculture to processing plants—that conflated prior social and economic divisions, creating more opportunities for more people while delaying indefinitely the true costs of this energy. The extraction and consumption of petroleum and its products in this new biological regime meant the amplification of hidden externalities (carbon, sludge, smoke, landscape conversion) into the atmosphere and biosphere in ways and with results that made them problems for everyone, and therefore for no one in particular.

Modernizing Realities

Well-intentioned administrators became mesmerized by the chimera of modernity as the violence of revolutionary fighting faded into popular memory. Manuel Ávila Camacho embraced the technology of national radio during the 1940s, and Miguel Alemán did the same with domestic television that gained popularity and independence during the 1950s. Citizens could transport their minds through these media and they could now transport themselves at a greater pace than ever before. Highways doubled in length, and

the number of transport trucks went from 41,932 to 105,162 over the decade.[42] When the Metro opened in Mexico City in 1969, it was a symbol of the economic miracle, but once again technical solutions did not meet the desires of the masses. Chava Flores's song, "*Voy en el metro*" poked fun at technocrats who forgot to include restrooms, representing a broader neglect for popular demands.[43]

Bureaucrats and engineers continued to harness natural resources to meet the growing population's energy demands. Two hydroelectric dams, on the Papaloapan in 1947 and the Grijalva River in 1951, displayed the increases in governmental investment for brute force technologies that tried to control waters and forests.[44] Additionally, Mexico developed a nuclear power program in 1965, which in turn provoked criticism and protest in the late 1980s from women and children and a scattered environmental movement.[45] Industries did not hesitate to take advantage of gains in energy production. General Motors convinced authorities and workers that an auto industry would bring progress and modernity. Both the mines of the 1880s and the factories of the 1950s looked to create a class of efficient, reliable, technically skilled workers.[46] Their more lasting results were an altered landscape and accumulated waste products.

The pull of modern techniques offered greater technology for agriculturalists. In 1939, the Swiss scientist Paul Mueller invented the synthetic pesticide known as DDT, and pesticides rapidly became tools to reshape rural society. Under Ávila Camacho, agriculture emphasized production, not social change or equality. New seed varieties developed by the U.S. Department of Agriculture and the Rockefeller Foundation made their way into Mexico as part of the Green Revolution.[47] This technology relied on a series of high modernist assumptions, namely that traditional techniques created obstacles and that nature was controllable. Coupled with an economy that was oriented towards industrial production these assumptions led to another series of food crises. Importantly, food production took on a state-controlled element during the economic boom of the mid-twentieth century because economic planners believed that rapid industrialization relied upon cheap food production.[48] The shift from the agrarian revolution to the Green Revolution also had a cultural component, as wealthy northern wheat growers received government preference over poor southern corn farmers.[49]

If B. Traven popularized life in the logging camps, anthropologist Oscar Lewis chronicled for the reading public the shift of millions of Mexicans from life in small villages like Tepoztlán, into the impoverished urban communities of Mexico City. Lewis, an anthropologist from the University of Illinois, came up with a controversial thesis: that there was a "culture of poverty" that characterized poor people, mainly urban slum dwellers, that made people raised in poverty unable to escape it. Lewis's work shifted the discipline of anthropology towards a more rigorous understanding of the urban poor and invited a good deal of controversy. His books on modernization in Mexico City were initially banned by the federal government, although many Mexicans rose to his defense.[50] For historians, Lewis's work provides ample observational data as he chronicled the pressures, choices, and dilemmas facing migrants, as well as shifts in land tenure, economic subsistence, and interpersonal relationships. The father in Lewis's *Children of Sánchez*, for instance, wins the lottery and moves to the new neighborhoods being constructed on the newly dessicated Lake Texcoco, that are plagued with dust storms and have no access to clean drinking water.

While millions of Mexicans moved to urban areas for work and as a response to land pressures, thousands of tourists came to get away from those very things at home. Climbers, in particular German mountaineers, had long been drawn to the volcanoes,

and gringo adventurers headed south for the economic opportunities, but the modernizing period and direct government initiatives cultivated a stable and growing tourist demand for the landscape—from its pyramids to its nightlife.[51] Nature, with modern trappings, proved a lucrative enterprise and Acapulco became a leisure icon with strategic new roads, resorts, and popularity among the blossoming movie industry. The national parks created in the 1930s sustained local interest, but international tourists began to seek out the more exotic locales for their vacations. Mexico became a hippie retreat in the late 1960s and 1970s, popularized by Carl Franz's *People's Guide to Mexico*, which has remained in print since 1972. Mexicans themselves have demonstrated their own preferences with their purchasing power—and they selected Sears over the Sierra Club. A culture of camping or nature exploration held little resonance for the masses that spent much of their lives sleeping on the ground and walking the land, "camping" in a different sense. Nor did wilderness call to the rising middle and upper classes who much preferred shopping to schlepping backpacks. Federal plans for tourism later shifted to the development of additional beach resorts, like Cancun, and attempts to take advantage of the blossoming demand for eco-tourism by the 1990s. Thus a contradictory tension developed as Mexicans sought to leave their rural landscape behind, while foreigners sought the romance and rawness that remained, in particular in the peripheral regions with coral reefs, gray whales, and tropical forests.

Neoliberal Dilemmas

Environmental concerns in the neoliberal years, too often ignored, seem both urgent and severe. As the total population increased, water proved a crucial paradox for national development; too much dropped in hurricanes in the south and too little fell across the deserts of the north. The problem of drugs tempted youth with its siren song of participation in an activity destructive to human and non-human life (especially as political pressures sought to eliminate it) but lucrative enough to recuse the possibility of extermination. Environmentalists, in the conventional interpretation put forth by nongovernmental organizations in the United States and Northern Europe, came on to the scene with much force in the neoliberal period but they also faced the most dire set of environmental problems, from filthy air to toxic waste.

Tropical stimulants and hallucinogenic cacti played important functions in native rituals but the taste for intoxicants has long shaped U.S.–Mexico relations and the border environment in more insidious ways. U.S. citizens turned to Mexico during the years of Prohibition, leading to expanded border city saloons and increased illegal drug use that encouraged nascent poppy and marijuana cultivation. By the 1980s, the drug trade came to have a large environmental footprint, one that often left violence in its wake. Based at first in Sinaloa on the Pacific coast, by the 1990s marijuana cultivation had expanded into the Sierra Madre of Chihuahua where it continues to threaten the lifeways of the Tarahumara Indians and the exceptional labyrinthine canyon system.[52] Lucrative to market, and popular to the imagination, drug cultivation has even spawned an entire musical genre, the narco-corrido.[53] Yet, despite the scale of destruction in forests cleared for the plants, the cost of lives ruined by its transport, and the creation of international linkages, an environmental history of drug growing has yet to be fully understood.

Often, recent efforts to create modernity did not end in revolution, instead they imploded. Claudio Lomnitz argues that after the debt crisis of 1982, fissures in the national fabric revealed a "dis-modernity" that replaced a universal faith in the

combination of Import Substitution Industrialization and the ideals of the revolu-
tion. According to Lomnitz, the post-1982 populace gauged modernity by
consumption habits rather than nationalism, and Mexicans either believed in the
possibilities of modernity through neoliberal policies or they insisted on the
superiority of local goods and viewed neoliberalism as a sell-out to multinational
corporations.[54] While certainly applications of technology appeared in later years,
widespread faith in the PRI (Institutional Revolutionary Party), the state, and the
promise of modernity was shaken in 1982 and collapsed along with the rumbling
earth by 1985.[55]

The earthquake that brought the capital to its knees presented a natural commentary
on what had become an unnatural urban conglomeration. The earthquake did not create
a disaster—instead it exposed one. From below the ground up past the rooftops, the
tangle of humanity and lifeless construction that had become the neoliberal city evoked
sublime chaos—a topography at once drawing in and repulsing observers. The basic
infrastructure of roads, pipes, and bridges shifted and tore with the sagging earth below
causing potholes, leaks, and explosions. In a dynamic process of collapse and renewal,
the urban landscape stripped down weakened edifices and that have since been built up
anew, like a forest floor. The city's ecosystem is not organic by any stretch of the imagina-
tion, yet it pulses with life and cycles through opportunity and catastrophe. The lessons
of so-called natural disasters, from earthquakes, to volcanic eruptions, to hurricanes,
floods, and droughts—ranging from the city to the countryside—and a comparative
examination of their effects would greatly enhance our knowledge of the changing cli-
mate and also the changing social responses to seemingly natural events.

Just as the Mexico City earthquake of 1985 gave rise to important new social groups
and networks of responsibility, environmental groups that drew upon collective strength
to pressure for changes in national policy and public culture came onto the floor in the
neoliberal period. The organization of El Grupo de los Cien (The Group of One
Hundred) may be the first urban grassroots environmental movement to respond to the
aggregate pressures wrought by neoliberal change. Shaped by poet Homero Arijidis and
artist Betty Ferber, the group helped pressure for tighter pollution controls in Mexico
City, the protection of gray whale habitat in Baja California, and the upkeep of climbing
huts on central volcanoes.

Transportation proved an organizing point for neoliberal environmental concerns
and found a governmental policy with the implementation of the *Hoy no Circula* cam-
paign in Mexico City. Officials designed the program, which bans most drivers from
using their vehicles once a week, to reduce the notoriously noxious air pollution in the
city. When imposed in 1989, the program applied to 2.3 million vehicles, or 460,000 a
day. Widely hailed as a policy success, longitudinal studies demonstrate that the restric-
tions led to an increase in purchases of used vehicles (to get around the one day restric-
tion) and an overall increase in emissions during evenings and weekends. There is no
evidence (either of decreased gasoline sales or increased ridership of public transporta-
tion) that the program improved air quality.[56] But while drivers were adjusting their
habits to avoid restrictions, flows elsewhere slowed. The Río Bravo (Rio Grande), a
legendary force of nature set in motion high in the San Juan Mountains of southern
Colorado on the cusp of the Continental Divide, snakes its way out of the United States
and becomes a stark boundary marker at the twin cities of El Paso and Ciudad Juárez.
Picking up industrial effluvia here, and agricultural toxins along the way, the river passes
through the incongruously named La Amistad dam before picking up additional pesti-

cides from the grapefruit and orange orchards and the scattered factories of deep-South Texas. When it reaches the gulf—something it stopped doing in 2000 due to the overgrowth of hydrilla, an invasive species—the river is little more than a symbolic mover of sludge.[57] The sinews and veins of modern connectivity continue to be laced with contradictions of an environmental turn.

While some programs, such as the *Hoy no Circula*, showed the neoliberal government's attention to environmental issues, other events demonstrated the contrary. The murder of human rights lawyer Digna Ochoa in 2001 illustrated this. Ochoa, internationally regarded for her work with the Miguel Agustín Pro Juárez Human Rights Center, had taken up the defense of two peasant ecologists, Teodoro Cabrera and Rodolofo Montiel, both imprisoned for their roadblock campaign attempting to cut off wide-scale logging enterprises in the mountains of Guerrero. The murder of Ochoa in her office in central Mexico City and the disorganized investigation resulting in immunity for her assassins belied more insidious forces aligned against both human rights and local campaigns to protect the environment.[58] The larger issues await resolution.

Movements for environmental protection and justice coincided with a new found voice for environmental issues during the neoliberal period. While environmental justice is a framework more applicable to the separate strands of environmental thought that emerged in the United States, cases like that of Digna Ochoa's deepened the coincidence of claims for environmental protection and social justice. Another instance of this is the Met-Mex Peñoles case involving hundreds of children in Torreón, Coahuila who were poisoned by the release of lead from an ore smelter. The smelter, with a heritage stretching back to 1887 and nationalized in 1971 by President Luis Echeverría, expanded after nationalization. Complaints about pollution led to several studies of lead levels in children's blood and IQ tests, and based on these studies local groups demanded action to curtail the poisoning. A federal environmental audit in 1995 led to various changes, although not enough to satisfy residents. In 1999 a group of mothers spawned a movement that insisted on the smelter's closure and in then filed a civil lawsuit for damages, which they won.[59]

Beyond movements and policies, popular culture conveyed the struggles of the neoliberal period just as it did the transformation of the woods and the expansion of the cities. Carlos Fuentes' biting critiques and social commentary resonate deeply. His first novel, *La región más transparente*, (translated as the now ironic *Where the Air is Clear*) created the Mexico City character Manuel Zamacona who offered, "One does not explain Mexico. One believes in Mexico, with fury, with passion."[60] Such belief shaped the longing and sense of belonging that Fuentes later captured as a contradictory embrace when he claimed, "Mexico is the heart of the battle in which the beautiful and the steadfast—art, sculpture, cities, and temples, things built for all eternity—fight the toxic progression of the ugly—garbage, the chaos of the city, the desolation of the countryside…." A landscape of such contradiction captured Fuentes attention as a continual theme of place and displacement and one also of use and conservation.

Conclusion

Mexico's modern environmental history pulls threads from its colonial past and weaves designs from its natural surroundings. Spanish colonists, delighted with the nature in New Spain, took note of the minerals to be pulled from the ground, the plants to be tended, and the pastures to be grazed. Creoles also bore witness to the ecological roulette

game that controlled their harvests, particularly through the staggering droughts that helped precipitate independence. Republican Mexicans lurched forward, harnessing all the energy they could to build a stable industrial system, clearing forests, laying railroad tracks, and reorienting land tenure patterns along the way. By the twentieth century then, revolutionaries fought to inherit an unevenly but securely industrialized environment, one that had scoured the central landscape of its abundant woodlands, exhausted the most arable soils, and depleted accessible minerals. While some of this bounty laid the scaffolding for national development, many individuals and corporations squandered the wealth wantonly, assuming that the fertility of nature held no limit. Not surprisingly, as extraction and industrial use reached new extremes, people began to notice the undesirable side effects. Floods in the city mounted, in some years rendering streets unusable for months on end. Cut-over woodlands exacerbated these floods so that when the rains came, they took precious top soil down the steep ravines and hillsides and into the towns and cities. Dust storms, especially in the newly dessicated Laguna Texcoco, threatened to extinguish the last breaths of residents. Rapacious extraction on a modern scale quickly reoriented the workings of natural systems and exacerbated environmental problems that had long plagued densely settled areas, especially Mexico City. Environmental history then is at once the resurrection of long held observations and ideas and also the application of new interpretations about the interdependence of human and non-human nature. Exploring these paradoxes, contradictions, and resonances allows us to create a more complete picture of the ways in which power is distributed, culture produced, economies built, and social relationships configured. The use and conservation of resources is always intimately tied to social trends.

Notes

1   Bernal Díaz del Castillo, *The Conquest of New Spain*, J. M. Cohen, trans. (New York: Penguin Classics, 1963).
2   Alexander von Humboldt, *Political Essay on the Kingdom of New Spain*, John Black trans. (New York: Kessinger Publishing, 2009 [1814]).
3   Patricia A. McAnany and Norman Yoffee, eds. *Questioning Collapse: Human Resilience, Ecological Vulnerability, and the Aftermath of Empire*, (Cambridge: Cambridge University Press, 2010).
4   Aldo Leopold, "Conservationist in Mexico," *American Forests* (March 1937), 118–120; 146.
5   John Tutino, "The Revolutionary Capacity of Rural Communities: Ecological Autonomy and Its Demise," 211–268, in *Cycles of Conflict, Centuries of Change: Crisis, Reform, and Revolution in Mexico*, Elisa Servín, Leticia Reina, and John Tutino, eds. (Durham and London: Duke University Press, 2007), 214.
6   Environmental studies of the border have come of age, although they remain divided between east and west and more concerned with the twentieth century. An environmental history of the entire political divide is still missing. See, Evan Ward, *Border Oasis: Water and the Political Ecology of the Colorado River Delta 1940–1975*, (Tucson: University of Arizona Press, 2003); Emily Wakild, "Border Chasm: International Boundary Parks and Mexican Conservation 1935–1945" *Environmental History* 14: 3 (2009).
7   Jaime E. Rodríguez O., *Down from Colonialism: Mexico's Nineteenth Century Crisis* (Los Angeles: University of California Los Angeles, 1983).
8   John H. Coatsworth, "Railroads, Landholding, and Agrarian Protest" in *Mexico From Independence to Revolution 1810–1910*, ed. W. Dirk Raat, 260–272 (Lincoln: University of Nebraska Press, 1982), 262.

9   John H. Coatsworth, *Growth against Development: The Economic Impact of Railroads in Porfirian Mexico,* (DeKalb: Northern Illinois Press, 1981), 21; 40.

10 Coatsworth, *Growth,* 4, 12.

11 John Mason Hart, *Empire and Revolution: The Americans in Mexico since the Civil War* (Berkeley: University of California Press, 2002), 107.

12 Carlos Sevilla Serdán, "El consumo de durmientes por los ferrocarriles nacionales de México." *México Forestal* XI, no. 1 (1933): 10–17.

13 Herman Konrad "Porfirian Forest Policy" in *Changing Tropical Forests: Historical Perspectives on Today's Challenges in Central and South America*, Harold K. Steen and Richard P. Tucker eds., (Durham, NC: Forest History Society, 1992).

14 Jan de Vos, *Oro Verde: La conquista de la Selva Lacandona por los madereros tabasqueños, 1822–1949,* (México: Fondo de cultura económica, 1996[1988]), 9–12.

15 For eighteenth century discussion of preparing cooking fires, see Matilde Souto Mantecón, "De la cocina a la mesa" pp. 15–49 in *Historia de la vida cotidiana en México: IV Bienes y vivencias. El siglo XIX*, Anne Staples, ed. (Mexico: Fondo de Cultura Económica, 2005), 35.

16 Claudia Agostoni, *Monuments of Progress: Modernization and Public Health in Mexico City, 1876–1910.* Calgary: University of Calgary Press, 2003); Mauricio Tenorio-Trillo, "1910 Mexico City: Space and Nation in the City of the Centenario" *Journal of Latin American Studies* 28 (1996): 71–104.

17 William H. Beezley, *Judas at the Jockey Club and Other Episodes of Porfirian Mexico.* 2d. ed. ([1989] Lincoln: University of Nebraska Press, 2004).

18 David P. Jordan, *Transforming Paris: The Life and Labors of Baron Haussmann*, (Chicago: University of Chicago Press, 1996), xix, 11, and 188.

19 Ramona Isabel Pérez Bertruy, "Parques y jardines públicos de la Ciudad de México, 1881–1911" PhD diss., Colegio de México, 2003), 3. Miguel Ángel de Quevedo, *Espacios libres y reserves forestales de las ciudades: su adaptación a jardines, parques, y lugares de juego: Aplicación a la Ciudad de México.* (México: Gomar y Busson, 1911). Quevedo played an important role in the Department of Forestry, Fish, and Game under Cárdenas, representing a technocratic link between the Porfiriato and the revolution.

20 Jonathan Kandell, *La Capital: The Biography of Mexico City* (New York: Random House, 1988), Manuel Perló Cohen *El paradigma Porfiriano: Historia del Desague del Valle de Mexico* (México: Instituto de Investigaciones Sociales, Miguel Ángel Porrua, 1999). Joel Simon discusses how the drainage canals of the nineteenth century were expanded in the 1950s, 1960s, and 1970s as population in the city nearly tripled. Joel Simon, *Endangered Mexico: An Environment on the Edge* (San Francisco: Sierra Club Books, 1997).

21 Description from *Gaceta médica de México* cited and translated in, *Epidemic Disease in Mexico City, 1761–1813: An Administrative, Social, and Medical Study*, Donald B. Cooper, (Austin: Instituted of Latin American Studies and University of Texas Press, 1965), 7.

22 Alejandro Tortolero Villaseñor, "Los usos del agua en la región de Chalco 1893–1913: del Antigua Régimen a la gran hidráulica," in *Tierra, Agua y bosques: historia y medio ambiente en el México central,* Alejandro Tortolero Villaseñor ed., (Mexico: CEMCA, Instituto Mora, Universidad de Guadalajara, 1996) 218–251.

23 On the desague, see Perló Cohen, *Paradigma Porfiriano,* the description by Kandell in *La Capital*, and *Breve Reseña de las obras ejecutadas para el Desagüe de la Ciudad de México Escrita Expresamente para los Delegados al Congreso Pan-Americano.* (México: Francisco Díaz de León, 1901).

24 *Drainage Works in the Valley of Mexico: Information Written for the Members of the Society of American Civil Engineers,* (Mexico: Tipografía de la Dirección General de Telégrafos, 1907), 14.

25 Robert M. Buffington and William E. French, "The Culture of Modernity" in *Oxford History of Mexico*, Michael C. Meyer and William H. Beezley, eds., (New York: Oxford University Press, 2000), 400, 418.

26 Rodríguez, *Down from Colonialism*, 16. How he determined "arable soil" is not clear. One needs only to think about desert-grown Pima Cotton to question if prosperous agriculture requires naturally arable soil.

27 Emilio Kourí, "Interpreting the Expropriation of Indian Pueblo Lands in Porfiran Mexico: The Unexamined Legacies of Andres Molina Enriquez" *Hispanic American Historical Review* 82:1 (Feb. 2002) 69–117.

28 Colin M. MacLachlan and William H. Beezley, *El Gran Pueblo: A History of Greater Mexico*, 3d ed. (Wilmington DE: Scholarly Resources, 2004), 187.

29 Emilio Kourí, *A Pueblo Divided: Business, Property, and Community in Papantla, Mexico*, (Stanford: Stanford University Press, 2004).

30 Joseph Cotter, *Troubled Harvest: Agronomy and Revolution in Mexico, 1880–2002,* (Westport, Conn.: Praeger Publishers, 2003); Dana Markiewicz, *The Mexican Revolution and the Limits of Agrarian Reform, 1915–1946,* (Boulder, Colo.: Lynne Reiner Publishers, 1993); John J. Dwyer, *The Agrarian Dispute: The Expropriation of American-Owned Rural Land in Postrevolutionary Mexico*, (Durham: Duke University Press, 2008).

31 Luis Aboites, *El agua de la nación. Una historia política de México (1888–1946)*, (México: Centro de Investigaciones y Estudios Superiories en Antropología Social, 1998); Sterling Evans, "Yaqui vs. Yanquis: An Environmental and Historical Comparison of Coping with Aridity in Southern Sonora," *Journal of the Southwest* 40: 3 (1998), 363–396; Mikael Wolfe, "The Revolutionary Emblem of a Nation: Narrative, Ecology, Technology and politics in the Making of 'La Laguna,' Mexico, 1850–1992," Ph.D. diss., The University of Chicago, 2009.

32 The literature on forests is growing with Chris Boyer's forthcoming book undertaking the most expansive view. See also Christopher R. Boyer, "Contested Terrain: Forestry Regimes and Community Responses in Northeastern Michoacán, 1940–2000," in *Community Forests of Mexico: Managing for Sustainable Landscapes*, David B. Bray, Leticia Merino-Pérez, Deborah Barry, eds. (Austin: University of Texas Press, 2005); David B. Bray and Peter Klepeis, "Deforestation, Forest Transitions, and Institutions for Sustainability in Southeastern Mexico, 1900–2000," *Environment and History* 11(2005): 195–223; Andrew S. Mathews, "Unlikely Alliances: Encounters between State Science, Nature Spirits, and Indigenous Industrial Forestry in Mexico, 1926–2008," *Current Anthropology* 50: 1(2009), 75–101.

33 Christopher R. Boyer and Emily Wakild, "Social Landscaping in the Forests of Mexico: An Environmental Interpretation of Cardenismo, 1934–1940" *Hispanic American Historical Review*, forthcoming.

34 Lane Simonian, *Defending the Land of the Jaguar: A History of Conservation in Mexico*, (Austin: University of Texas Press, 1995); Christopher R. Boyer, "Revolución y paternalismo ecológico: Miguel Ángel de Quevedo y la política forestal, 1926–1940," *Historia Mexicana* 57:1 (July–Sept., 2007), 91–138; Emily Wakild, "'It Is to Preserve life, to Work for the Trees:' The Steward of Mexico's Forests, Miguel Ángel de Quevedo, 1826–1946," *Forest History Today* (Spring-Fall, 2006), 4–14.

35 Emily Wakild, *An Unexpected Environment: National Park Creation, Resource Custodianship, and the Mexican Revolution*, forthcoming, University of Arizona Press.

36 María Elena Altamirano Piolle, *José María Velasco: Paisajes de luz, horizontes de modernidad*, (Mexico: DGE-Equilibrista, 2006). Raymond B. Craib, *Cartographic Mexico: A History of State Fixations and Fugitive Landscapes*, (Durham: Duke University Press, 2004).

37 For the pull of Mexico see Helen Delpar, *The Enormous Vogue of Things Mexican: Cultural Relations between the United States and Mexico, 1920–1935*, (Tuscaloosa: University of Alabama Press, 1995). Perhaps the best known are Carleton Beals, John Reed, and B. Traven. See the fantastic study of the latter by Heidi Zogbaum, *B: Traven: A Vision of Mexico*, (Wilmington, DE: Scholarly Resources, 1992).

38 Coatsworth, *Growth*, 37.

39 Myrna Santiago, *Ecology of Oil: Environment, Labor, and the Mexican Revolution, 1900–1938*, (Cambridge: Cambridge University Press, 2006), 1.

40 Santiago, *Ecology of Oil*, 4.

41 On the consequences of this shift see Richard Marks, *The Origins of the Modern World: A Global and Ecological Narrative from the Fifteenth to the Twenty-First Century*, 2d ed.(New York: Rowman and Littlefield, 2007) and J.R. McNeill, *Something New Under the Sun: An Environmental History of the Twentieth Century World*, (New York: W.W. Norton, 2001).

42 Steven Niblo, *Mexico in the 1940s: Modernity Politics, and Corruption* (Wilmington, DE: Scholarly Resources, 1999), 343, 22.

43 Jeffrey Pilcher, ed. *The Human Tradition in Mexico*, Introduction (Wilmington DE: Scholarly Resources, 2003), xx, xxii.

44 Luis Aboites Aguilar, "El último tramo, 1929–2000" in *Nueva historia mínima de México* (México: El Colegio de México, 2004), 272.

45 Velma García-Gorena, *Mothers and the Mexican Antinuclear Power Movement* (Tucson: University of Arizona Press, 1999), 3, 17.

46 Steven J. Bachelor, "Toiling for the "New Invaders": Autoworkers, Transnational Corporations, and Working-Class Culture in Mexico City, 1955–1968." in *Fragments of a Golden Age: The Politics of Culture in Mexico Since 1940* Gilbert Joseph, Anne Rubenstein, and Eric Zolov eds., 273–326, (Durham: Duke University Press, 2001), 274–276.

47 Angus Wright, *The Death of Ramón González: The Modern Agricultural Dilemma* (Austin: University of Texas Press, 1990), 140, 172, 182.

48 Enrique C. Ochoa, *Feeding Mexico: The Political Uses of Food since 1910* (Wilmington DE: Scholarly Resources, 2000), 9.

49 Jeffrey M. Pilcher, *Que Vivan Los Tamales! Food and the Making of the Mexican National Identity*, (Albuquerque: University of New Mexico Press, 1998), 113.

50 Oscar Lewis, *Life in a Mexican Village: Tepoztlán Revisited*, (Urbana: University of Illinois Press, 1963) *Five Families: Mexican Case Studies in the Culture of Poverty*, (New York: Basic Books, 1959); *Children of Sánchez: Autobiography of a Mexican Family* (New York: Vintage, 1963). See also, Rachel Villarreal, "Gladiolas for the Children of Sánchez" Ph.D. Dissertation University of Arizona, 2009; and Karin Rosemblatt, "Other Americas: Transnationalism, Scholarship, and the Culture of Poverty in Mexico and the United States," *Hispanic American Historical Review*, 89: 4 (2009), 603–641.

51 Dina Berger, *The Development of Mexico's Tourism Industry: Pyramids by Day, Martinis by Night*, (New York: Palgrave Macmillan, 2006).

52 Alan Weisman, "The Deadly Harvest of the Sierra Madre" in *The Late Great Mexican Border: Reports from a Disappearing Line*, Bobby Byrd and Susannah Mississippi Byrd, eds., 170–185 (El Paso: Cinco Puntos Press, 1996).

53 Elijah Wald, *Narcocorrido: A Journey into the Music of Drugs, Guns, and Guerrillas*, (New York: Rayo Harper Collins, 2001).

54 Claudio Lomnitz Adler, *Deep Mexico, Silent Mexico: An Anthropology of Nationalism*, (Minneapolis, University of Minnesota Press, 2001), 121.

55 The two most notable events were the dismantling of Article 27 of the constitution in 1992 to enter the economy into the North American Free Trade Agreement, and the election of an opposition party candidate and former Coca-Cola executive Vicente Fox as president in 2000. Both events represent a retreat from state oriented technologies that promoted modernization and a shift towards reducing government authority over the economy and society. For the environment, deregulation often meant re-regulation.

56 Lucas W. Davis, "The Effect of Driving Restrictions on Air Quality in Mexico City" *Journal of Political Economy* 116: 1 (2008), 38–81.

57 Robert Lee Maril, *Patrolling Chaos: The U.S. Border Patrol in Deep South Texas*, (Lubbock: Texas Tech University Press, 2004), 6–8.

58   Linda Diebel, *Betrayed: The Assassination of Digna Ochoa*, (New York: Carroll & Graf Publishers, 2005).

59   Jordi Díez and Reyes Rodríguez, "Environmental Justice in Mexico: The Peñoles Case", in *Environmental Justice in Latin America: Problems, Promise, and Practice*, David V. Carruthers, ed., 161–181 (Cambridge, Mass.: Massachusetts Institute of Technology, 2008).

60   Fuentes discusses this in *This I Believe: An A to Z of a Life*, trans. Kristina Cordero, (New York: Random House, 2005), 174.

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Peculiarities of Mexican Diplomacy

MONICA RANKIN AND DINA BERGER

Mexican diplomatic history embraces a rich field with a substantial scholarship and much room for further study. The literature dealing with the history of Mexico's foreign relations tends to fit within two broad categories. First, scholars of U.S.–Latin American relations have produced works that examine Mexican diplomacy broadly as well as more narrowly-focused studies of issues specific to Mexico (Langley, 1991; McPherson, 2006). Many of those studies rely heavily on U.S. sources and tend to consider Mexico within larger models of U.S. relations with all of Latin America. Both these broad paradigms, namely U.S. domination or unequal interdependence, do not necessarily apply to Mexico. Likewise, traditional studies that characterize the history of U.S. policies in Latin America—particularly in the late nineteenth and twentieth centuries—in terms of national security, economic expansion, or cultural hegemony often consider Mexico to be an exceptional case. Compared to the small, mono-agricultural states of Central America and the Caribbean, the United States did not control elections or overthrow elected leaders (although it sometimes tried), did not form and train a federal army or take over customs houses, and it did not send armed forces to fight the Cold War directly in Mexico. In contrast to the larger, faraway nations of South America, the United States did intervene militarily in Mexico in the nineteenth century for the purpose of territorial acquisition. The above peculiarities of the relationship between the United States and Mexico have helped to create a unique diplomatic setting that often defies comparison with the rest of the region.

A second source of literature on Mexican diplomacy comes from works produced by scholars specializing in Mexican history. Those studies include Mexican sources and they consider the nation's diplomatic history in both a global and a national context. One of the most useful and insightful sources for U.S.–Mexican relations is *The United States and Mexico* by Josefina Zoraida Vázquez and Lorenzo Meyer (the English-language edition remains unrevised, while the Spanish-language editions have gone through regular updating). It offers a cohesive narrative of diplomatic relations between the two countries throughout the nineteenth and twentieth centuries. Other excellent sources cited

throughout this chapter examine more isolated diplomatic episodes, but offer an analysis that considers the national and global context. Taken together, Mexican historiography and that of U.S. foreign relations offer insightful perspectives on the development of diplomatic trends in twentieth century Mexico. Despite a long history of what scholars describe as one of conflict (1840s–1920s) and neglect (1940s–1970s), Mexico and the United States—two large, distinct nations that share one of the world's longest borders—today enjoy a partnership of economic, political, and social cooperation as compared to the rest of Latin America (Domínguez and Fernández de Castro, 2001: 1–15). A unique relationship has emerged between the United States and Mexico and that relationship has helped to shape the role that Mexico plays in the world. These peculiarities and the way they have influenced the course of Mexico–U.S. relations result primarily from geographical proximity and the nature and timing of Mexico's Revolution. Lorenzo Meyer has taken these peculiarities one step further by arguing that after the Revolution of 1910 Mexico was able to maintain "relative independence" in its foreign policy precisely because of its proximity to the United States. Specifically, he asserts that throughout the twentieth century U.S. leaders have pursued diplomatic relations in the interest of maintaining the internal legitimacy of a political system within Mexico that was acceptable to U.S. politicians and businesses (Thelen, 1999).

Geographical proximity to the United States has been and will always be a factor with which Mexico contends. In the nineteenth century, the ambiguous shared border meant that United States expansionists set their sights on Mexico. The exceptionalism and outright bigotry of the U.S. provided reasons to expand not just west but south, as the campaign for frontier domestication included the eventual absorption of Mexico's northern half in 1848. Mexico has also been a pawn in the imperial hopes of others. To be sure, Napoleon III's invasion and occupation of Mexico during the American Civil War was not accidental; it was meant to counterbalance U.S. dominance in the region and to send a clear, threatening message from nearby.

Proximity has also shaped Mexico's marketplace. The ease with which U.S. investors traveled to Mexico in the late nineteenth century set the terms for a kind of economic interdependence that continues today, especially since the neoliberal opening in the late 1980s and the introduction of commercial arrangements like the North American Free Trade Agreement (NAFTA). Mexico is second to Canada as the most important trade partner of the United States, while the United States serves as the predominant marketplace for Mexican exports, consuming more than 89 percent by 2000 (WTO, Trade Policy Reviews, http://www.wto.org/english/tratop_e/tpr_e/tp190_e.htm). In addition to economic interdependence, a shared border has shaped diplomatic agendas on both sides, creating policy concerns unique to Mexico and the United States such as border regulation, immigration legislation, worker programs, water rights, and enforcement strategies to fight the drug war. This closeness has produced a rich transnational history of intercultural fluidity and exchange which, in no small way, has provided opportunities for everyday forms of diplomacy, whereby students, workers, *fronterizos*, artists, tourists, and civic groups—not just diplomats and border patrol officers—mediate relations between the two countries.

The nature and timing of the 1910 Revolution also sets it apart from the rest of the region, while its aftermath came to dominate much of the nation's history and its relationship with the United States and other nations (Engel, 1969). Because the Revolution took place in the early twentieth century, Mexico never posed the kind of real or imagined threat to U.S. national security as its neighbors, whose revolutions were fought

during the Cold War and were seen as evidence of the growing reach of communism (Ross, 1964). While U.S. leaders expressed concerns about the leftist leanings of revolutionary administrations, particularly that of Lázaro Cárdenas (1934–1940), they were more concerned with anti-Americanism and with the protection of U.S. property and investment. Furthermore, by the 1920s, it had become clear that U.S. policymakers prioritized stability in Mexico and often justified anti-democratic and other questionable policies in those terms (Thelen, 1999: 605–608). The U.S. government's reaction to the Revolution—arm sales to revolutionaries, the occupation of Veracruz, and the Pershing Expedition—paled in comparison to Cold War containment strategies employed in much of Latin America from the 1950s.

The meaning of the Revolution also sets Mexico apart from more radical revolutions in Latin America after World War II. A revolution actually constituted of many revolutions from below and above, capitalism and (a moderate) liberal democracy, or what Alan Knight refers to as "'inclusionary' authoritarianism", triumphed (Knight, 1992: 137). By the 1960s, in a hemisphere-wide context of fear and anti-communism, Mexico stood as an exemplar revolution. As a result, Mexico City eventually became a base of operation for U.S. activities against communism in the rest of Latin America. Despite comprising many revolutions, *la revolución* took on a singular meaning by the 1920s. Under the control of what eventually became the official-party system (with two earlier changes that became the Partido Revolucionario Institucional, or PRI, in 1946), the Revolution was reified by the national regime as the third stage linked to an ongoing revolution that began with independence movements in 1810 and continued during the liberal triumph of 1867 (Benjamin, 2000; Knight, 1992a). This revolution *en perpetua* resulted in political stability and national purpose through which the government exercised economic and political nationalism against a U.S. behemoth. Without severe U.S. retribution (militarily, economically, or politically), Mexico nationalized railroads and oil, passed legislation limiting majority foreign holdings and restricting land ownership, and took a stance against U.S. policy in the region from opposing sanctions against Cuba to becoming a founding member of the Contadora Group and attempting to broker peace in Central America in the 1980s.

As important as the Revolution was in shaping a unique twentieth-century history of U.S.–Mexican relations, more recent history has limited Mexico's ability and desire to challenge U.S. policy in the region. The 1982 peso crisis and subsequent cycle of bailouts and loans by the International Monetary Fund and the World Bank—two institutions dominated by the United States—forced Mexico to restructure its economy. It cut social spending, liberalized industries it had been subsidizing, and opened its doors to (more or less) unrestricted international trade. By the late 1980s, it had also entered into trade talks with the United States and Canada. The economic climate of protectionism and nationalism officially ended with the signing of NAFTA in 1994, ushering in a new era of economic and inter-governmental cooperation between Mexico and the United States that has produced positive and negative results. Wal-Mart provides a good example. After gaining a 50 percent stake in Mexican conglomerate Cifra in 1991, Arkansas-based Wal-Mart opened its first Sam's Club. Within a decade, Wal-Mart de México was formed, cornering more than half of the entire Mexican retail market. With its many holdings—Walmart and Banco Walmart, Sam's Club, Bodega Aurerrá, Superama, Suburbia, and Vips and El Portón—it stands as Mexico's single largest employer. While a multinational like Wal-Mart brings low-cost products to consumers and provides much needed job opportunities, its plans to open big-box stores in historical sites like Oaxaca and Teotihuacán have provoked outrage and protest. Meanwhile, its business ethos has

hindered unionization in a nation with a long tradition of labor organizing. Shared economic interests do not necessarily translate into shared policies, diplomatic goals, or attitudes. Disagreements over immigration legislation, border regulation, and drug war strategies remain sticking points and old attitudes of paternalism (U.S.) and nationalism (Mexico) still plague legislators (Domínguez and Fernández de Castro, 2001: 14).

As Mexico–U.S. diplomatic relations have become more cordial and cooperative in the twenty-first century, it remains difficult to shed a longstanding relationship of conflict and neglect. The ideas of conflict and neglect are valid when considering diplomatic trends between the two nations, but this history also reveals a system of negotiation and resistance. Mexican diplomatic history and relations with the United States must be considered within the context of internal national developments and also within the context of Mexico's role in the rest of the world. This chapter chronicles many of the most important developments in the nation's diplomatic history from the late nineteenth century to the present. It considers the most pertinent themes and scholarship and highlights subjects in need of further study. Diplomatic affairs with the United States tend to dominate much of the historical narrative for reasons outlined in this introduction, and the bidirectional nature of this relationship is particularly prominent in the scholarship emanating from the field of U.S. diplomatic history. As a number of studies reveal, U.S.–Mexican relations have not taken place in a vacuum, and placing Mexican diplomatic relations in a more global context is one of the contributions made by scholars of Mexican history.

Nineteenth-Century Diplomacy and the Porfiriato

An examination of Mexican diplomatic history in the twentieth century must begin with an understanding of the nation's relationship with the world in the late decades of the nineteenth century. Diplomatic trends in the early nineteenth century were mired in the internal conflicts and instability that plagued the country after independence. The nation secured its independence from Spain in 1821 but in the years immediately following, Spain refused to recognize Mexico's status as a sovereign nation and threatened to reconquer the area. National and local strongmen vied for power and internal disputes erupted over the form of government that should be put into place to create a strong nation, particularly as Mexico faced numerous threats from abroad. Besides Spain, the United States expressed a strong interest in annexing large quantities of Mexico's northern territory; and France launched an attack against the young nation in an attempt to secure reparations for damaged property owned by French citizens (Gueda, 1997). Eventually Mexico lost approximately half of its national territory to the United States at the conclusion of the U.S.–Mexican War in 1848 and endured five years of occupation by the French army in the 1860s. The accompanying economic chaos resulted in excessive foreign loans to try to keep governments afloat and to finance struggles against foreigners. Outstanding debts further contributed to the nation's diplomatic struggles throughout the nineteenth century, as did resentment toward the United States relating to border problems after 1848. These foreign crises were at times exacerbated by internal disputes and a lack of unity among national leaders (Rippy, 1959).

Despite the importance of foreign invasion and other diplomatic crises in the decades following independence, scholars have not explored nineteenth-century history from a diplomatic perspective in any great depth. European involvement in Mexico receives only cursory coverage in studies that focus more specifically on national developments. Conflict with the United States has received more attention, but often studies of the

U.S.–Mexican War are presented almost exclusively from a U.S. perspective (Bauer, 1974; Eisenhower, 1989; Singletary, 1960). One of the best studies on the war is *The Diplomacy of Annexation*, published in 1973 by David Pletcher. Despite his unsophisticated description of Mexico's internal politics, Pletcher presents an insightful analysis of the diplomacy behind the war, focusing on U.S. expansionist interests. More recent studies have moved beyond Pletcher's diplomatic portrayal and presented the war more firmly within the context of Mexico's national history (Griswold del Castillo, 1990; Henderson, 2007; Robinson, 1989; Santoni, 1996).

Domestic and diplomatic tensions did not begin to abate until the authoritarian regime of Porfirio Díaz (1876–1911). Díaz rose to power as a result of the Revolution of Tuxtepec and the overthrow of Sebastián Lerdo de Tejada. One immediate priority for the new leader was to secure international recognition for his administration from the United States and other powerful European nations. To achieve this, Díaz began making payments on the substantial debt owed to the United States. Furthermore, Díaz aimed to attract foreign investors as a way to encourage the U.S. and other governments to recognize his administration. The United States finally granted official recognition to the Mexican government in April 1878. With these steps, Diaz brought a period of relative stability and general growth. Ironically, despite problems and resentments that had development as a result of foreign interventions, it was foreign involvement in the economy that fueled much of the growth during the Porfiriato (Pletcher, 1958; Topik, 1992; Weiner, 2004).

Official relations between Mexico and the United States improved substantially during the Porfiriato. Government leaders worked to settle disputes arising from Indian raids and general lawlessness along the border. Boundary agreements, water treaties, and customs resolutions addressed many of the long-standing conflicts between the two nations. The Porfiriato also coincided with the era of imperial expansion in Europe. While the United States did not pursue territorial expansion as aggressively as its European rivals, U.S. leaders did set their sights on a form of informal imperialism in the 1880s and 1890s. Rather than aiming to acquire large amounts of new territory, U.S. leaders instead focused their attention on extending the economic and cultural reach of American influence (Rosenberg, 1982). The U.S. emphasis on economic expansion found compatibility in Porfirian Mexico as Díaz and his close circle of *científico* advisers implemented economic and social policies based on the theory of positivism. This new line of thought, which had originated among intellectual circles in Europe, was made popular by the French philosopher Auguste Comte. Positivists turned to scientific knowledge and observable facts over traditional beliefs and superstitions. The philosophy promoted the idea of deterministic progress, which suggested that all societies would pass through specific stages of development. Motivated by positivist ideas, the Díaz administration aggressively pursued industrial and economic expansion as a method to expedite the journey through the various stages of deterministic progress. Such rapid industrial development in a nation that had experienced so many decades of political and social turmoil required strong-armed tactics by the Porfirian government. It also required a massive influx of capital, most of which arrived in the form of direct foreign investment from the United States. As Díaz succeeded in imposing a sense of order and stability throughout the nation, U.S. investors eagerly looked southward for new economic opportunities (Beatty, 2001; Schell, 1999).

U.S. investors grew more interested in Mexico when a series of new laws were passed governing commerce and investment. Long-standing trade treaties were renegotiated in

the 1800s to allow for reciprocal duty-free trade on certain products. Porfirian leaders also revised immigration policies to encourage the settlement of lands legally defined as "vacant," particularly in northern territories. New decrees, such as the Ley de Tierras Baldías (Law of Vacant Lands, 1883), allowed investors to occupy large tracts of land. Indigenous villages that could not provide legal title to lands that had been administered by the community—often dating back centuries—frequently lost claim to those properties. Large hacienda and cattle ranches emerged throughout Northern Mexico and many of those estates came under the ownership of U.S. and other foreign investors (Wasserman, 1984; Wells, 1985).

Two other major industries that attracted U.S. and other foreign investors were the mining sector and the railroad industry, and the Porfirian government implemented policies to encourage investments in those areas as well. Revisions to mining laws enacted throughout the 1880s allowed the government to grant subsoil rights to mining companies. As a result, foreign investors were lured by the promise of expanding profits in mining enterprises (Bernstein, 1964; Ficker, 2000). Similarly, the Díaz administration granted concessions to attract British and U.S. investors in the railroad industry (Tischendorf, 1961). In three decades of Porfirian rule, railroads expanded from only 640 km to nearly 20,000 km, connecting commercial and mining centers with the border and coastal ports to facilitate trade. In October 1909, U.S. President William Howard Taft and Mexican President Porfirio Díaz made history when they conducted the first formal meeting between leaders of the two nations. The meeting, which took place in El Paso, was marked by formal pageantry designed to honor the two leaders as equals. The encounter resulted in even stronger diplomatic bonds between the two nations. As recent scholarship points out, the meeting also set the stage for intelligence sharing between the U.S. and Mexico that may have foiled an assassination attempt against Díaz at that El Paso meeting (Harris and Sadler, 2009).

A notable diplomatic trend developed during the Porfiriato as Mexican leaders established a Central America policy that placed the nation as a "middle power" between the United States and the rest of Latin America. Jürgen Buchenau's seminal work on the diplomatic relations with the Central America demonstrates that Mexico began playing an intermediary role between the United States and other nations in the Western Hemisphere as early as the nineteenth century. He argues that a combination of geography and national development made Mexico uniquely suited to play the role of "middle power." Although it has received relatively little scholarly attention, Mexico's early diplomatic role in Central America set a precedent that leaders would continue in the late decades of the twentieth century (Buchenau, 1996). Mexican leaders further expanded the nation's diplomatic reach when they noted the successful programs of modernization and development in Japan. Taking a major interest in Japan's emergence on the world scene, Díaz send a scientific expedition to Tokyo to observe the eclipse of the sun in January, 1879. That visit resulted in a popular interest in Japanese art and culture, and the exchange of diplomatic representatives (Cortés, 1980).

The diplomatic and economic policies enacted by Porfirio Díaz were intended to modernize and stabilize the nation, but the administration paid little attention to the social costs of those policies. Mexico's centennial celebration in 1910 offers a telling illustration of the incongruities between industrial development and social policy. Mauricio Tenorio-Trillo's research describes the ostentatious display crafted by government leaders in Mexico City with the intent of attracting foreign investments, while social programs suffered (1996). By the end of the Porfiriato, the Díaz administration had converted Mexico

from the isolated and unstable young nation that had emerged in the nineteenth century into a bourgeoning economy characterized by industrial and infrastructure expansion. The image of a stable and inviting economy attracted foreign investors and won Díaz the diplomatic approval of foreign powers, particularly the United States and Western European nations. Nevertheless, the picture of stability proved to be an illusion as internal unrest escalated and eventually erupted in the 1910 Revolution.

Diplomacy and the Mexican Revolution

For many decades, scholars treated the Revolution as an isolated and internal occurrence that had little to do with the nation's diplomatic history. Certainly exceptions existed, but not until recent scholarship have investigators systematically considered the Revolution in the context of nuanced and constantly changing diplomatic relations with the United States and Europe. Such studies make several significant historiographical contributions. First, they consider the relationship between the United States and Mexico during the late Porfiriato and throughout the revolutionary years as a model for later U.S. policy in the rest of Latin America (Hart, 1997). Second, scholars such as Peter Calvert illustrate the complexities of international recognition and support afforded to—or withheld from—Francisco Madero and other early revolutionaries in the overthrow and immediate aftermath of the Díaz administration (2008). Finally, studies like that of Friedrich Katz (1984) place the seemingly national event squarely within the context of the global conflict that developed in World War I.

Several prominent themes emerge when considering the Revolution in terms of international diplomacy. During the initial anti-Díaz uprisings, concerns arose over the ease with which Madero and other Mexican conspirators operated on U.S. soil (Raat, 1976). Although the U.S. was not complicit, many revolutionaries were able to find sanctuary on the U.S. side of the border, and those leaders played a vital role in the planning and execution of rebellions against the Díaz regime. The United States later became a planning ground for anti-Madero conspiracies. Opposition groups operating across the border never posed a real threat to the Madero administration, but the new president did raise diplomatic concerns with U.S. emissaries. At the same time, U.S. leaders closely monitored developments in Mexico as revolutionary violence increasingly threatened U.S. landowners and industries operating there. Indeed, U.S. troops in Texas mobilized in response to Madero's initial uprising in 1910. As the conflict continued and intensified in later years, the U.S. government also considered the possibility that violence could spill across the border and threaten internal security in southern states. One notable example surfaced in 1915 when two followers of Venustiano Carranza led a series of rebellions in southern Texas. Their actions came in response to the Plan de San Diego, a manifesto that aimed to spread revolution throughout the Southwestern United States and liberate the region from U.S. control (Harris and Sadler, 1978; Sandos, 1992). New scholarship by Charles Harris and Louis R. Sadler establishes a direct link between the Plan de San Diego and the Carranza government (2009; forthcoming).

In response to increasing violence in Mexico, the U.S. military continued to heighten its state of alert along the border and mobilized National Guard troops to patrol the frontier. United States leaders at times interfered in the revolutionary conflict in an attempt to protect the property holdings and business interests of U.S. citizens. One of the most egregious examples of U.S. intervention occurred when Ambassador Henry Lane Wilson helped to orchestrate the coup against Madero that resulted in the presi-

dent's overthrow and execution and ushered in the dictatorship of Victoriano Huerta (Blaisdell, 1962; Wilson, 1927). Furthermore, the U.S. military intervened in Tampico and Veracruz in 1914 (Quirk, 1967) and in northern Mexico through the Pershing Punitive Expedition in 1916–17 (Eisenhower, 1993). The mobilizations and interventions by U.S. troops provoked a nationalist reaction within Mexico. Anti-U.S. demonstrations erupted in many parts of the country and some revolutionaries were able to use nationalist sentiment to their advantage. Venustiano Carranza, an adept diplomat, led his Constitutionalist alliance to victory against Huerta in 1914 in large part because of his posturing against the U.S. occupation of Veracruz and his denunciation of Huerta's willingness to negotiate with American leaders. The Constitutionalist victory in 1914 further complicated relations with the United States as divisions surfaced among revolutionary leaders and the chain of command and ability to negotiate became clouded.

The international backdrop to the Revolution was the outbreak of World War I in Europe in 1914. As European powers became increasingly pulled into the developing conflict at home, Mexico also became a part of their wartime strategies (Katz, 1984). European leaders saw Mexico as an important source of raw materials, particularly oil. But the Revolution itself also entered into wartime planning. Many world leaders viewed instability in Mexico as an obstacle to U.S. involvement in World War I. The Germans in particular attempted to provoke further unrest with the hope of inciting the U.S. to intervene in Mexico, thereby keeping its military occupied and out of the European conflict. The Germans first tried unsuccessfully to bring about the return of Victoriano Huerta in 1915 (Meyer, 1972). This failed scheme was followed by attempts to negotiate an alliance with Venustiano Carranza. Germany's wartime plots eventually culminated in a proposal to secure Mexico's support for Germany in exchange for a return of territories lost to the United States in the nineteenth century. Germany's plan was outlined in the famous 1917 Zimmerman Telegram that was intercepted and decoded by the British (Tuchman, 1985). A German–Mexican alliance never materialized; indeed, the telegram served to harden U.S. support for joining the Allies in World War I. The episode also led U.S. leaders to finally recognize Carranza's presidency. Mark Gilderhus has argued that Carranza skillfully played a diplomatic balancing act during these years (1977). By pitting the United States and Germans against each other, and by keeping U.S. leaders in a state of uncertainty over Mexico's loyalties, Carranza successfully secured diplomatic recognition from the United States without having to bow to U.S. influence. This is one of the earliest examples of what Lorenzo Meyer has called Mexico's diplomacy of relative independence, and it set an important foundation for diplomatic relations that followed.

Carranza's securing of recognition from the United States was accompanied by another major event in U.S.–Mexican relations. On March 9, 1916 Pancho Villa's forces carried out their famous raid on Columbus, New Mexico. The Villista attack resulted in 18 American casualties and strained the already tense relationship between the two nations. Theories abound as to the motive for the attack on U.S. soil. Friedrich Katz's classic biography argues that Villa was purposefully trying to provoke a limited intervention by the United States, similar to the U.S. occupation of Veracruz. Katz documents that Villa believed that Carranza and Wilson had developed a secret pact and he hoped that an intervention by the United States would be exposed and would compel Mexicans to unite behind his version of revolution (1998).

President Wilson did react to the raid by ordering a punitive expedition under General John J. Pershing to cross into Mexican territory and hunt down Villa. Carranza

attempted to secure a diplomatic advantage and requested a reciprocal agreement whereby Mexican troops would also be allowed to cross into U.S. territory. When the U.S. rejected such an agreement, Carranza once again protested against the U.S. incursion with a nationalistic flair. At the same time, Mexican delegates were meeting in Queretaro to draft a new constitution that would include many of the reforms being demanded by revolutionary leaders. In terms of U.S.–Mexican diplomacy, the Pershing expedition and the Constitutional Congress became intricately intertwined (Hill, 1973).

U.S. and Mexican dignitaries met on several occasions to try to discuss the potential withdrawal of U.S. troops from Mexico. They also addressed the deliberations simultaneously ongoing at the Constitutional Congress. Unites States representatives were particularly concerned that revolutionary reforms would threaten U.S. property holdings and other economic interests in Mexico. Representatives of the Wilson administration attempted to use the promise of withdrawing Pershing's troops as leverage to win guaranteed protection for U.S. citizens in the new constitution. Carranza's government resisted these demands and instead insisted on the unconditional withdrawal of U.S. troops. By February 1917, U.S. military priorities had shifted to World War I. After months of tense diplomatic negotiations, U.S. forces withdrew unconditionally, painting Carranza once again as the nationalist leader who stood up against the hegemonic power to the north. And once again a diplomacy of relative independence allowed leaders to safeguard national interests against pressure from the United States.

At the same time, the Constitution of 1917 was approved, containing numerous articles that could potentially threaten the U.S. and other interests. For example, the document placed limits on foreign property ownership rights, and it guaranteed certain rights to laborers. Furthermore, the constitution introduced the Calvo Doctrine, which stipulated that foreigners in Mexico had the same legal protections as Mexicans and would receive no special judicial or legal status by virtue of diplomatic protection. In addition, legislation was introduced almost immediately in the Congress that would give the government ownership of oil deposits previously granted to U.S. and European companies during the Porfiriato (Richmond, 1984). Carranza also pursued unity between Mexico and the rest of Latin America during an era that was marked by repeated U.S. interventions throughout the Western Hemisphere. His position became known as the Carranza Doctrine and it emphasized Latin American solidarity and a renunciation of U.S. hegemony in the region (Gilderhus, 2007).

Despite Carranza's strongly nationalist stance in his administration's diplomatic dealings with the United States, his rhetoric yielded little in the way of immediately tangible results. Carranza hesitated to implement the most anti-foreign reforms contained in the Constitution. Moreover, few Latin American leaders were inclined to respond to the call for solidarity against the United States in the Carranza Doctrine. Nevertheless, the nationalistic foundation established during his presidency set the stage for revolutionary reforms implemented in the coming years.

Diplomacy and Revolutionary Policy

In the years immediately following the decade of Revolutionary civil war, the United States came to dominate Mexican diplomatic concerns. The emergence of the U.S. in that role was largely tied to the new global order that emerged from World War I. The

war concluded with the United States as a new diplomatic and economic leader on the world stage, while most European nations concluded the war deeply in debt and struggling to rebuild economic and infrastructure networks. The United States was in a position to control much of the global credit market as well as regional commercial networks, and Mexico's revolutionary regimes desperately needed to reestablish global financial credibility in order to put the nation more solidly on a path to recovery. As a result, revolutionary leaders of the 1920s found themselves seeking recognition and conciliation first and foremost from the United States.

As Alvaro Obergón took power in 1920, he found himself balancing the need to appeal to the United States as a new global leader with the domestic demands to implement various revolutionary reforms. Further complicating the relationship was the fact that Obregón took over the presidency during the final days of Woodrow Wilson's presidency in the United States—after Wilson's health had declined because of the serious stroke he had suffered in October 1919. As a result, the friendly atmosphere that had greeted the Revolution out of Washington was replaced by a more challenging position as members of the U.S. Congress grew concerned that nationalistic measures within the Constitution of 1917 would negatively affect U.S. interests (Hall, 1981).

Obregón's administration strategically backed away from some revolutionary reforms in the early 1920s. Obregón pursued agrarian reform more aggressively than his predecessor, and some U.S. holdings were included in his land reform measures (Dwyer, 2008; Hall, 1980). But land expropriation under Obregón was relatively modest and the administration was careful not to target influential American landowners. Even more significant was Obregón's attitude toward oil investors (Hall, 1995). During his administration the Supreme Court issued a ruling in favor of U.S. oil interests as they appealed Carranza's earlier decrees that had granted subsoil oil rights to the nation. Obregón's stance was much less antagonistic and the Supreme Court ruled that such policies would not be retroactive. Land and oil policies that came out of the Revolution raised concerns that a Marxist system was emerging from the Mexican Revolution, and those concerns were particularly acute in the immediate aftermath of the violent Russian Revolution. Obregón further exacerbated concerns when he moved closer to the labor movement and backed the national workers' organization, the Confederation of Mexican Workers (CROM) in labor disputes. Unites States investors and government officials were wary of the Obregón administration, but found the new president's conciliatory policies to be a promising sign of a more favorable capitalistic climate in Mexico.

A final concession to U.S. interests took shape as the Obregón administration worked to reach an agreement on outstanding debts and to attract new U.S. financial investors (Hall, 1995). Although relations between the United States and Mexico remained tenuous for several years, leaders in both nations actively worked toward improving the diplomatic climate with the goal of securing formal U.S. recognition of the Mexican regime. That goal was finally realized in 1923 when delegates of the two nations met to iron out an informal accord known as the Bucareli agreements. Although not a formal treaty, the Bucareli agreements proved instrumental in smoothing over diplomatic tensions between the United States and Mexico. They included provisions for addressing outstanding financial and civil claims by U.S. citizens dating back to the years of revolutionary violence. The agreements also clarified a more constrained implementation of revolutionary reform as it applied to U.S. interests. The accord allowed both governments to save face and it allowed the Obregón administration to secure formal U.S. recognition. In the

midst of finalizing the Bucareli agreements with the United States, Obregón faced a serious internal threat as the president's one-time ally, Adolfo de la Huerta, rose in revolt to challenge the selection of Plutarco Elías Calles as his presidential successor. Newly-strengthened relations with the United States gave Obregón a distinct advantage as the United States sent arms and other military assistance to support Obregón's regime. Many scholars credit the successful completion of the Bucareli agreements with helping Obregón put down the de la Huerta revolt (Machado, Jr. 1972).

While the Bucareli agreements had paved the way for formal recognition of the Obregón administration by the U.S. government, the pact also came about in the final months of his presidency. Because the agreement was informal in nature, there was no guarantee that subsequent administrations would continue to honor it. During the Calles administration (1924–28), disagreements over revolutionary policies in the oil industry continued to dominate the diplomacy between the two countries (Buchenau, 2007). Calles attempted to implement new laws that regulated foreign control of oil and that limited foreign ownership of coastal and frontier property. Tensions mounted between the two nations once again and the U.S. ambassador, James Sheffield, refused to negotiate with the Calles administration (Smith, 1972). Several contemporary observers suggested that the ambassador's stubbornness and hostility toward Mexico was partially responsible for the escalating animosity.

In 1927, Dwight Morrow replaced Sheffield as ambassador and he brought with him a new approach toward diplomacy (Ross, 1958). Despite his ties to J. Pierpoint Morgan and the banking committee that tried to squeeze Mexico, he became known as a man who respected Mexican culture and was willing to negotiate and compromise. He orchestrated Charles Lindberg's famous goodwill tour shortly after the aviator's record-setting trans-Atlantic flight. It was during that trip that Lindberg began courting Morrow's daughter, Anne Spencer Morrow and the two married in 1929. Morrow's approach brought more amicable negotiations between the two countries and resulted in a modest slowing of revolutionary reform against U.S. interests. He also helped to broker an armistice in Mexico's Cristero rebellion and his diplomatic style generally fostered an improvement in cultural relations. Furthermore, his tenure as Ambassador to Mexico occurred during an era when U.S. artists and intellectuals traveled extensively in Mexico. They exhibited a strong interest in the nation's pre-Colombian history and many were inspired by the social reform agenda of the Revolution. As a result of Morrow's goodwill and the presence of American "political pilgrims," cultural relations between the two nations strengthened during the 1920s (Delpar, 1992; Danly, 2002).

Morrow's tenure as ambassador ended in 1930 at a time when Calles continually attempted to interfere with a series of presidents from the behind the scenes in an era known as the Maximato. It was also the beginning of the worldwide Great Depression, which further complicated relations with the United States, particularly pertaining to debt. The United States attempted to deal with growing unemployment by repatriating large numbers of Mexicans. The Mexican population in Los Angeles decreased by 30 percent between 1930 and 1935 (Sanchez, 1993: 213). Large numbers of returning workers strained the already struggling economy in Mexico, but the biggest impact of the repatriation came at the cultural level as many Mexicans viewed the deportations as discriminatory and as an insult to national pride. The immigration issues that have dominated U.S.–Mexican relations in the late twentieth century have roots in these earlier periods (Balderrama and Rodríguez, 1995). Despite the importance of migration trends in the nations' diplomatic history, the topic has been researched mainly by scholars of

Mexican–American history from the U.S. perspective. A thorough examination of migration from the perspective of Mexican history is needed.

Nevertheless, revolutionary policies during the Maximato became more friendly toward U.S. interests as Calles institutionalized the Revolution through the creation of the National Revolutionary Party (PNR) and shifted many of his positions farther to the right. In the early 1930s, government policies became less favorable toward labor unions and Mexico severed diplomatic relations with the Soviet Union. Concerns among U.S. leaders that revolutionary policies would follow a Marxist trajectory abated to some extent. As relations with the United States improved, the role played by European powers in Mexico's economy and diplomacy declined. At the same time, Mexican leaders began to devise a long term strategy to develop a viable tourist industry that would appeal to U.S. travelers. The foundations laid in the 1930s allowed a vibrant tourist industry to thrive in the 1950s and beyond as U.S. vacationers ventured to Indian ruins and took advantage of Mexico's coastal beaches (Berger, 2006).

Dwight Morrow's more conciliatory approach to diplomacy in Mexico proved to be more than just the isolated actions of one man. Starting with the administration of U.S. President Herbert Hoover (1929–33), attitudes toward relations with Mexico and all of Latin America began to transform as Hoover publicized a new policy of cooperation and non-intervention. That change in stature provided the foundation for what became the Good Neighbor Policy under Franklin D. Roosevelt (1933–45) with his ambassador Josephus Daniels (Cronon, 1960). The motives behind the Good Neighbor Policy must be considered within the context of the ongoing instability in Europe at the time (Pike, 1995; Wood, 1961). United States leaders began to grow concerned that European conflicts might easily spill over into the Western Hemisphere, particularly as the world continued to suffer the economic crisis of the depression. Furthermore, U.S. policy makers recalled the ambivalent position most Latin American nations had taken during World War I when only Cuba declared war in alliance with the United States. Roosevelt and his advisors hoped to create a buffer against potential instability in the rest of the world. The Good Neighbor Policy also included economic provisions that allowed the Roosevelt administration to establish reciprocal trade agreements with individual Latin American nations in an attempt to reduce some of the negative effects of the depression (Garner, 1964). One of the best accounts of Roosevelt's diplomacy in Mexico is Friedrich Schuler's *Mexico Between Hitler and Roosevelt* (1998).

Despite the rapprochement intended by the Good Neighbor Policy, in the latter half of the 1930s relations between the United States and Mexico faced a number of challenges. Lázaro Cárdenas took over as president in 1934 and he dedicated his administration to revitalizing many of the social justice aspects of the Revolution that had stalled during the Great Depression. Cárdenas worked to restore an amicable relationship between the national government and the labor movement, signaling that his administration would be more friendly to workers' interests. He backed the creation of a new national labor union and linked the organization directly to the revolutionary party. At the same time, he created a nation-wide peasant organization that was also directly tied to the revolutionary political party and he developed a system of loyalty among junior officers in the nation's military. Cárdenas's political strategies in the early years of his administration allowed him to break free of the overshadowing influence of Calles, and by 1935 the former military strongman and politician was sent into exile. Cárdenas succeeded in solidifying his presidential authority and built a broad base of support within Mexico. That support network allowed him to pursue revolutionary reform vigorously

and with a nationalistic flair. But often those reform policies ran contrary to U.S. and other foreign interests. Cardenas developed what he called the "Buen Amigo" diplomacy toward Latin America (Kiddle, 2010).

The first signs of trouble appeared in 1935 when the Cárdenas administration began expropriating rural estates as part of a dramatic agrarian reform policy. Some U.S. properties, particularly in the northern regions, were subject to expropriation and redistribution. Conflict quickly arose over the nature and amount of compensation property owners would receive, and it became clear that Cárdenas was not willing to bend to pressure from U.S. leaders. Between 1934 and 1940, his government redistributed more than 45 million acres of land to rural peasants, mostly in the form of communal *ejidos*. Of that total amount, approximately ten percent had been expropriated from U.S owners (Dwyer, 2002).

U.S.–Mexican relations became even more strained as the Cárdenas administration's pro-labor policies threatened U.S. industrialists. In 1938 the Cardenas government settled a labor dispute between railroad workers and company owners by nationalizing the industry and turning management over to workers. The immediate impact of this measure primarily affected European investors, but the move caused concern among U.S. businesses. Shortly after the railroad dispute, the government stepped in once again in a labor conflict, favoring oil workers against foreign-owned oil companies. This time, U.S. companies—who controlled a large portion of the oil industry—were caught in the middle of Cárdenas's revolutionary reforms. The conflict arose when the oil workers union (STPRM) attempted to negotiate a new contract that included a substantial increase in wages and benefits. Company executives refused to meet their demands and offered a much lower compensation package. In May 1937, the oil workers went on strike and the government stepped in to arbitrate. Government negotiators put forward a solution that largely supported worker demands. Some analysis suggests that the Mexican government was carefully orchestrating the situation to take control of the oil industry (Vazquez and Meyer, 1995: 148). Congress was debating a bill that would allow the government to bypass the agreements reached in the 1920s between Calles and Morrow regarding royalties and subsoil rights. The solution proposed by government arbitrators seemed to be designed to place severe limits on oil companies' profit potential.

Foreign oil companies appealed the government's decision in the court system. In March 1938, the Supreme Court ruled in favor of the workers. As oil company executives attempted continued negotiations with the government, Cárdenas announced that his administration would expropriate nearly all foreign-owned oil interests (Knight, 1992). The announcement shocked oil company executives, who refused to accept the compensatory terms offered by Cardenas. Within Mexico, the reaction was one of equal surprise, but the expropriation generated a spirit of revolutionary nationalism among many Mexicans as much of the country rallied to support the president.

Cárdenas's expropriation of foreign-owned oil companies became the source of intense negotiation with the Roosevelt administration. Company executives and some within Roosevelt's cabinet urged the U.S. president to return to a policy of armed intervention if necessary, but the backdrop of the Good Neighbor Policy combined with an increasingly complex and volatile situation in Europe convinced Roosevelt to react more moderately. Of particular concern to the Mexican and U.S. governments in the 1930s was the growing animosity between Communist and Fascist ideologies. The Nazi Party rose to power in Germany in 1933 and the National Fascist Party gained momentum in Italy starting in the late 1920s. At the same time, the international Communist move-

ment under the Communist International (Comintern) became evermore vocal in denouncing the emerging far-right ideologies. Both sides aggressively attempted to capitalize on the worldwide economic hardships of the 1930s and the anxieties that accompanied them to recruit new supporters. The encroachment of European tensions into the Western Hemisphere was precisely what the Good Neighbor Policy was intended to prevent.

One of the most visible examples of the tensions surrounding extremist ideologies can be seen in Mexican reactions to the Spanish Civil War. Leftist groups in Mexico followed the war closely and supported the Spanish Republicans by disseminating anti-Fascist propaganda, pressuring the Mexican government to intervene, and sending aid to the Spanish left. At the same time, a number of conservative interest groups vocally backed the Spanish Nationalists. Religious groups and ardent capitalists launched their own pro-Falange, Pro-Franco propaganda. The volatile ideological climate in Mexico made U.S. leaders wary, particularly as they saw extreme right groups, such as the Sinarquistas and Acción Católica, begin to gain strength. Furthermore by the late 1930s, intelligence reports indicated that Mexico's German community was building a broad base of support and the risk of Nazi and Fascist encroachment in the Western Hemisphere seemed great (Schuler, 1998). United States leaders did not want to see a growing far-right political movement destabilize the Cárdenas government. Cárdenas himself built a reputation as a staunch anti-Fascist by granting asylum to Spanish Republican refugees and by taking a strong diplomatic stance against the Falange (Powell, 1981).

The Roosevelt administration treated the situation cautiously. Avoiding the dissemination of extremist ideologist in the Americas took priority over cracking down aggressively on Cárdenas's expropriation policies. The Mexican government also seemed to understand the need for a carefully orchestrated diplomatic approach. As U.S. oil companies reacted to the expropriation measures by boycotting Mexican oil, U.S. refiners refused to process Mexican crude and equipment manufacturers cut off Mexican producers in need of parts and other supplies. Faced with an impending economic crisis, Cárdenas began negotiating with Germany and Italy in an attempt to expand the international market for Mexican oil.

The volatile situation began to ease in 1940 when Sinclair Oil Company engaged in direct negotiations with the Mexican government. Reaching a settlement with one U.S. oil company gave the Cárdenas administration leverage when appealing to U.S. leaders. Shortly thereafter, presidential elections brought a new administration to power. Manuel Avila Camacho (1940–46) was considered more friendly to capitalist interests and the outbreak of war in Europe added a distinct sense of urgency to the need resolve the situation. In November 1941, just a few weeks before the Japanese attack on Pearl Harbor, the U.S. and Mexican governments created a joint task force to settle payment terms. Ignoring protest from oil executives, U.S. leaders agreed to a $24 million payment, plus interest—an amount that was eventually increased to $30 million. The settlement marked a major nationalist victory for the government. Not only had leaders successfully resisted oil executives' demands for payment of $100s of millions, but more importantly, they had compelled the U.S. government and foreign oil companies to accept the constitutional provision that allowed the Mexican government to controlled national subsoil rights.

The conclusion of the oil controversy came at a fortuitous time, as World War II had already broken out in Europe and the crisis had become an important backdrop to inter-American relations (Paz, 1997). The United States entered the war following the attack

on Pearl Harbor and many Latin America nations immediately declared their allegiance with the Allies at that time. Mexico maintained an official position of neutrality, largely because much of the country still harbored a large degree of suspicion toward the United States. Nevertheless, the government's proclivities toward a U.S. alliance were clear when in the early months of 1942 Avila Camacho participated in the Mexican–American Joint Defense Committee and tapped former President Cárdenas to oversee a newly-created military zone along the Pacific Coast. By the summer of that year, Mexico had formally declared war after German submarines began sinking Mexican oil tankers in the Gulf of Mexico.

With Mexico's entry into the war, an aggressive propaganda strategy was put into place (Rankin, 2009). United States and Mexican government agencies oversaw the dissemination of wartime information in an attempt to secure favorable public opinion for the war effort. Most Mexicans eventually offered some degree of support to the government's wartime policies, and Mexico contributed in strategic ways to the Allied cause. Defense agreements with the United States provided for the establishment of important military strongholds on Mexican soil. Mexican citizens living in the United States became eligible for military service and as many as 150,000 Mexicans eventually served in the U.S. military. Tens of millions of dollars of military aid flowed into Mexico through the lend-lease program and allowed the nation to modernize its military. Mexico also sent its own fighting force to serve overseas as Squadron 201 participated in combat in the Pacific in 1945 (Schwab, 2002). Furthermore, Mexico provided tens of thousands of temporary workers in U.S. agriculture and other industries through the Bracero Program (Calavita, 1992; Driscoll, 1999). Both of these episodes in Mexican diplomatic history are in need of additional study, particularly from the Mexican perspective.

Mexico's largest contribution to the Allied cause was as a supplier of raw materials. The U.S. need for strategic materials was compatible with the desires of leaders to pursue a rigorous industrialization policy. Wartime collaboration with the United States gave Mexico access to international credit markets and opened the door for direct foreign investments to develop necessary industries and infrastructure—financial tools that had been lacking in the decades following the Revolution (Niblo, 1995). By the end of the war, the United States had provided $90 million in credit and U.S. direct investments in the manufacturing sector had increased from 7 percent to 25 percent (Vazquez and Meyer, 1995: 161). Furthermore, roughly 90 percent of Mexico's foreign trade was with the United States.

The government carefully balanced this new economic relationship while still maintaining a sense of revolutionary nationalism. Foreign control of certain industries was limited to 49 percent, with some exceptions approved by the government in the interest of wartime security. Other industries were barred completely from foreign involvement. By the end of the war, government leaders and local industrialists were looking to orchestrate a post-war economic climate that would favor industrial development. Nevertheless, generally, Mexico and the United States enjoyed a close diplomatic relationship in the early years of the Cold War, immediately following World War II. Cold War priorities meant that relations with the United States tended to dominate Mexican diplomatic concerns.

Cold War Diplomacy

Mexico's involvement in World War II set the stage for a new economic relationship with the United States. Nationalist tendencies that had initially appeared as revolutionary rhetoric in the first half of the twentieth century morphed into actual policy starting in

the 1940s until the 1970s. Government leaders favored an economic modernization strategy that privileged the development of domestic industries and that restricted foreign participation in certain economic sectors. At the forefront of this policy was the desire to expand the production of manufactured goods, particularly durable consumer goods. Government leaders actively promoted industrial expansion by imposing tariffs on competing foreign goods and by keeping the labor sector under firm control. The resulting expansion in the manufacturing sectors in subsequent years was impressive; and the simultaneous stability and growth of the economy led economists and other observers to name the period "The Mexican Miracle." And while policymakers did not refer to the new economic direction specifically as Import Substitution Industrialization, the general trajectory of the Mexican economy reflected the theories behind such a policy (Joseph and Spenser, 2008).

U.S. leaders generally approved of the post-war direction of Mexico's economic policies, with only a few caveats. On the one hand, Cold War attitudes favored policies that curtailed the influence of labor and encouraged capitalist industrial development, as Mexico's post-war strategies did. Many U.S. leaders believed that the resulting stability of the Mexican economy was one of its best weapons in combating Soviet influence in the Western Hemisphere. On the other hand, U.S. business interests objected to the high tariffs and other trade barriers that allowed Mexico's industrial sectors to grow. Furthermore, Mexican leaders became increasingly aggressive at implementing constitutional restrictions on direct foreign involvement in the economy. Importantly, Mexico's leaders actively pursued outside investment in select industries where foreign expertise and capital were deemed to be vital for national development. The tourist industry expanded considerably in the 1950s as the administration of President Miguel Alemán welcomed U.S. interests as part of his strategy to develop Acapulco into a resort town (Berger, 2006).

These years also marked the beginning of the Cold War, as a global struggle for influence and power played out between the United States and the Soviet Union. For the United States, fighting the Cold War involved stemming the tide of Soviet style communism and Mexico became an important part of anti-communist strategies in all of Latin America. Mexico's role in the Cold War is a subject that scholars have only recently begun to examine in depth. This lack of scholarly assessment is partly because much of the historical documentation relating to Cold War policy remains classified by U.S. and Mexican intelligence agencies, while other information was only recently made available to researchers. Furthermore, many studies of U.S. Cold War history come from U.S. diplomatic historians who have tended to consider policies toward Latin America as a whole; and policy toward Mexico generally has not fitted nicely into the theoretical models used to understand U.S.–Latin American relations in general. A recent work by Jefferson Morley incorporates investigative journalism, archival research, and oral histories to tell the story of the CIA's first Mexico City station chief, Winston Scott (2008). Morley reveals that operatives in Mexico City were at the center of CIA activities throughout Latin America in the 1950s and 1960s, supporting anti-communist activities in Cuba and elsewhere. Morely also reveals a close personal relationship between CIA officials and several Mexican presidents. Those relationships suggest a much more cooperative and complex relationship between Mexican and U.S. leaders in the context of the Cold War than scholars have previously considered. Much more scholarly research needs to be conducted to complement Morley's journalistic approach and to fill this important void in Mexican and U.S. diplomatic history.

Despite providing a friendly setting for U.S. intelligence operations, Mexican leaders exhibited a significant degree of autonomy in many of their diplomatic positions during the Cold War. Mexican leaders supported the U.S. Cold War stance in the United Nations, but declined to break formal diplomatic relations with the Soviet Union. Following the Cuban Revolution, Mexico also resisted U.S. demands within the Organization of American States to sever diplomatic ties with Cuba. Furthermore, in the 1960s, Mexican leaders spearheaded the proposal to make Latin America a nuclear free region. President Adolfo López Mateos expanded the nation's global diplomatic reach by visiting countries all over the world and by welcoming numerous world leaders to Mexico.

Mexico's impressive economic story, combined with its expansive diplomatic reach, brought the nation world-wide recognition that culminated in Mexico becoming the first "developing" nation to host the Olympic Games in 1968 (Whitherspoon, 2008). Nevertheless, the history of the Olympic experience has been overshadowed by the student movement that developed in Mexico City that same year. Often seen by scholars as part of the international student movements of the 1960s, the youth challenged government policies that ignored poverty, oppressed labor, and marginalized the internationalist youth position. The protests were met with violence in October 1968 as the government prepared to host the Olympic Games. In what became known as the Tlatelolco massacre, government troops opened fire on student protestors resulting in numerous deaths and many more arrests. This episode of history must be understood not only from the context of domestic politics, but also as part of a global youth movement. Eric Zolov's *Refried Elvis* offers the most insightful analysis of this movement as an example of cultural diplomacy (1999).

While government repression did not attract much immediate diplomatic attention, President Echeverría did attempt to address domestic criticism by enacting increasingly populist policies in the 1970s. Resorting to nationalistic rhetoric, Echeverría increased government spending on social programs and intensified the trend of Import Substitution Industrialization by accelerating the rate of government investments into heavy industry. Echeverría further punctuated his nationalistic stance by embracing an ostensibly leftist foreign policy under the watchful Cold War eye of the United States. He maintained close relations with Cuba, welcomed the widow of leftist Chilean president Salvador Allende, and gave asylum to other leftist sympathizers fleeing right wing military regimes in Latin America. Other presidents continued this trajectory by protesting against U.S. actions in Central America in the 1980s and attempting to promote a sense of Latin American nationalism in the midst of U.S. pressures in the late Cold War. Mexico's nationalistic economic policies and its pro-leftist diplomatic policies during this period need to be explored further, particularly in the context of Lorenzo Meyer's theories regarding Mexican foreign policy of "relative independence."

Border Issues and Contemporary Diplomacy

In the background of U.S.–Mexican relations in the 1960s and 1970s was the ever-increasing drug trade across the border. The history of the drug trafficking between the two countries is long and complex, yet historians have paid scant attention to this important aspect of U.S.–Mexican relations. United States laws enacted as early as 1914 attempted to regulate the distribution and use of narcotics and other drugs. Throughout the 1920s and 1930s, transport routes for illicit substances developed along the border

and an illegal but profitable drug trade emerged. By the 1960s, Mexico was on the verge of replacing the Near East as the main supplier of heroin and marijuana to the U.S. market. This increase in drug activity prompted government leaders to create agencies that were predecessors to the Drug Enforcement Agency and were specifically devoted to enforcing narcotics laws. By the end of the decade, the drug trade was threatening to destabilize the delicate diplomatic relationship between the United States and Mexico. In 1969, U.S. law enforcement agencies staged Operation Intercept, effectively closing the border for several weeks in an attempt to confiscate illegal drug transports. The operation was short-lived and was generally considered a failure, but it left a sense of bitterness between the leaders of both countries. It was also the first step in many further diplomatic disputes surrounding the drug trade in the coming decades.

By the 1980s, Mexico had become a major transit route for Colombian cocaine headed for the United States, while Mexican drug suppliers also continued to send their products north. As drug activities in Mexico increased, corruption and collusion between cartels, law enforcement, and even political leaders became evident and strained relations between the two nations. In 1986, U.S. lawmakers passed legislation giving drug enforcement officials greater power to extradite foreign citizens on drug-related charges. Nevertheless, U.S. attempts to pursue Mexican suspects through the judicial system was often met with resistance and protest by Mexican government officials. One of the most notable examples of this strained diplomacy occurred in the aftermath of the 1985 abduction, torture, and murder of DEA agent Enrique Camarena. In the years following his death at the hands of a Mexican drug cartel, U.S. leaders grew increasingly impatient at the slow pace and apparent lack of urgency in the Mexican justice system in prosecuting the case. In 1990, U.S. agents orchestrated the kidnapping of Humberto Alvarez-Machain, a Mexican doctor suspected of participating in Camarena's torture, and covertly transported him from his home in Mexico to the United States to stand trial. Despite official diplomatic protests, Alvarez-Machain remained in U.S. custody. In 1992 the U.S. Supreme court ruled that his detention was legal and he could stand trial—a decision that prompted a collective outcry from Mexico and many other Latin American nations who interpreted the decision as a manifestation of U.S. hegemony in the region. In recent years, the U.S. v. Alvarez-Machain case has been cited in cases involving terrorism suspects as a precedent-setting case for detaining individuals abroad.

Because it involves border security, the drug trade is often conflated with problems surrounding illegal immigration—particularly from the perspective of U.S. policymakers. People of Mexican descent make up roughly 12 percent of the U.S. citizenry, creating an increasingly rich and complex demographic component to the population (http://www.census.gov/prod/2003pubs/p20-545.pdf). Furthermore, an estimated 11 million Mexican immigrants reside and work in the United States, either temporarily or permanently and more than half of those are considered "undocumented" (http://migrationinformation.org/USfocus/display.cfm?id=767). The growing Mexican and Mexican-American population has played an important role in the U.S. economy throughout the twentieth century and it has become a powerful force in U.S. politics. At a cultural level, Mexican immigrants serve as a conduit between the two nations. Through these communities, cultural influences are become increasingly evident throughout the United States, as Mexican immigrants are also responsible for exporting U.S. culture to Mexico. The diplomatic importance of immigration is also evident as the issues became one of the main points of discussion between the leaders of the two nations in the last half of the twentieth century. Both immigration and the drug trade have strained relations

between Mexico and the United States and they offer another example of the unique relationship created by geography. All these topics are covered regularly in excellent reports produced the Mexico Institute, of the Woodrow Wilson Center and by the Center for U.S.–Mexican Studies at the University of San Diego, Roderic Ai. Camp, provides historical contexts to this issues in his publications, most recently in *The Metamorphosis of Leadership in a Democratic Mexico* (2010).

Concluding Remarks

Mexico's proximity to the United States has resulted in a diplomatic history in which the nation's northern neighbor is ever-present. But its geographical location, combined with the specific nature and timing of the Revolution, has also resulted in a diplomacy that Lorenzo Meyer has labeled a relationship of "relative independence." This relationship is unique to Mexico, as other nations of the Western Hemisphere experienced overt interventions, particularly in the context of the Cold War, followed by the wave of neo-liberal economics. Unlike its Latin American neighbors, Mexico implemented aggressive and nationalistic social and economic reforms throughout the twentieth century, all the while maintaining a delicate diplomatic balance with the United States. Mexico also achieved relevance as a world power, largely by selectively displaying its autonomy from the United States on important global issues.

Despite an impressive record of diplomatic autonomy, it is undeniable that Mexico's proximity to the United States has also resulted in a history of closeness between the two nations. A cooperative alliance during World War II and a collaboration to fight Communism in Latin American during the Cold War offer proof of that relationship. Mexico's turn toward neoliberal economic policies in recent decades has further strengthened that bond. Mexico's decision to privatize parastatals and to remove trade barriers in the 1980s paved the way for the passage of NAFTA in 1994. And a U.S. sponsored bail-out package helped to avoid further economic decline following the devastating peso crisis that same year. Ironically, that crisis was caused primarily by unwise fiscal policy as Mexican leaders attempted to appeal to U.S. investors. Today a strong U.S. presence can be felt in the Mexican economy as U.S.-based corporations, retailers, and restaurant chains have appeared throughout the country.

A rich field of historiography outlines the numerous episodes that make up this unique diplomatic relationship. Yet there is much room for further research, particularly on the themes traditionally addressed by journalists, economists, and sociologists. The diplomatic implications behind Mexico's economic policy in the last half of the twentieth century need additional scholarly attention, as do themes dealing with immigration, the drug trade, and Mexico's role in Cold War politics. A closer historical examination of these and other trends will further underscore the unique relationship between Mexico and the United States, while at the same time elucidating the role of national and global considerations in Mexican diplomacy.

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Chapter Thirty Three

Science and Public Health in the Century of Revolution

Gabriela Soto Laveaga and Claudia Agostoni

Introduction

Beyond cultural understandings of health and sickness, the history of health in Mexico is, as in other societies, an indication of the needs and aspirations of the time. While each country may seek to attain and maintain certain standards of health, *how* it defines and achieves these goals allows us to better grasp the political, economic, and social history of each nation. Mexico's history of public health is as much an analysis of attempts to control diseases, as a study of who or what was perceived to be problematic to attaining national goals. For example, the arrival of liberal ideas, the understanding and assimilation of the germ theory of disease causation, the incorporation of scientific notions about the body, and the implementation of diverse medical innovations and technologies, are all woven into the fabric of the course of the country's nineteenth and twentieth centuries. Indeed, one can trace changing health practices to particular political and social moments. This chapter offers an overview of some of the pivotal moments in the history of public health and medicine in Mexico during the course of the nineteenth and twentieth centuries. To that end, it examines the numerous difficulties and challenges that health authorities faced during the course of most of the nineteenth century, as well as the preeminence that public health and urban sanitation acquired during the Porfirio Díaz regime (1876–1910). It also takes into consideration the reorganization of public health in the aftermath of the Revolution, in the post-World War II era, and during the neo-liberal reforms of the 1980s with the aim of illustrating how illness helped to define political agendas and how political goals, in turn, determined which illnesses would be addressed.

Public Health During the Course of the Nineteenth Century

Throughout the course of the nineteenth century, and well beyond the end of the armed phase of the Revolution (1910–1920), the country presented formidable health problems. Epidemic outbreaks of yellow fever in the tropical and temperate zones, typhus and typhoid in the central regions, the prevalence of smallpox, tuberculosis, and sexually

transmitted diseases, as well as many longtime endemic problems—such as dysentery, respiratory diseases, and malaria—were constant elements that accompanied the life and that led to the death of numerous men, women, and children. The country's vast geographical and cultural diversity, the lack of suitable roads and other means of communication between towns, ports, frontiers, and cities, and, furthermore, the scant number of titled physicians in both urban and rural settings, meant that the majority of the population had occasional or no contact with titled physicians, nurses, hospitals, medicines, or vaccines well into the 1940s. Instead, a huge variety of unlicensed practitioners, as well as a wide array of healers, herbalists, bone-setters, and midwives, along with specialists in medicinal remedies and manual skills, catered to the needs of both the urban and rural populations.

In 1821, when Mexico attained its independence from Spain, the lack of economic and political stability hampered the enactment of comprehensive and far reaching health policies. Although comprehensive health policy directed and established by the government took place primarily in the final decades of the nineteenth century, important developments prefigured the more interventionist role that the government was to adopt. A fragmented and overlapping set of health authorities emerged during colonial Mexico and outlasted Spanish colonial rule. For example, the Royal Board of the Protomedicato was only suppressed in 1831; numerous religious institutions and corporations assumed medical authority during epidemic times well into the nineteenth century (Tate Lanning 1985; Cooper 1965; Hernández Sáenz 1997), and the central government had a very limited role in the provision and regulation of health and welfare services. During the 1830s, both the Medical Faculty of the Federal District (1831) and the Medical Sciences Establishment—the precursor of the national Faculty of Medicine (1833)—were established, with the exclusive right to oversee medical education and public sanitation. In 1841 the Superior Council of Public Health was founded, and became primarily a consulting and advisory agency to the federal government. From the 1840s to the 1870s the Superior Council's work was limited due to the lack of financial resources and political stability, as well as the absence of personnel necessary to carry out its main duties. These included making sure that titled physicians were adequately qualified to practice, supervising the quality of medicines produced and sold, as well as visiting hospitals, jails, and schools to assess their sanitary conditions and functioning throughout the capital city. Notably, the Council did not have jurisdiction outside of the city and most health and sanitation measures that it implemented emerged during times of epidemics. These power limitations were clear to all during the 1833 and 1850 cholera epidemics, when quarantines and fumigation were implemented in the capital and throughout numerous provincial cities but without a uniform approach to curtail the impact of the disease. Thus, the consequences of those outbreaks to human life and to national and international commerce were disastrous.

There were also other prominent obstacles to the formulation of a comprehensive, efficient, and coherent national health policy throughout most of the nineteenth century, such as the prevalence of numerous endemic and epidemic diseases, in particular smallpox and typhus; the tensions between central government intervention and states' autonomy; as well as the conflicts that arose due to the power and influence of the Catholic Church in matters relative to the control of charitable institutions, cemeteries, and hospitals.

The laws of Reform of the late 1850s and early 1860s underlined the liberal precepts of order, efficiency, and discipline, and led to the secularization of most hospitals, and to the establishment of marriage and civil registries. Furthermore, the Constitution of 1857

stressed the government's primacy over religious prerogatives and federal autonomy, and expressed the regime's direct involvement in the protection and education of the population. While most hospitals fell under government jurisdiction during the 1860s, they continued to experience unacceptable sanitary conditions and lacked sufficient economic resources and trained personnel. For example, hospitals in cities such as Campeche, Guadalajara, Guanajuato, Mexico City, and Puebla, were housed in vulnerable buildings, with poor ventilation, open latrines, overcrowding, and a serious lack of medical and administrative personnel, a situation that in the 1870s led Juan de Dios Peza to state that most hospitals were death traps or charnal houses that generated enormous fear among the people (Peza, 1881).

The 1857 Constitution, as important for what it did not say as for what it did, included no law relating directly to public health, and it restricted the council's authority in order not to infringe the sovereignty of states and municipalities. The latter implied that each state had the freedom and constitutional right to resolve as best as they could their sanitary and public health problems and concerns. The establishment, also in 1857, of the civil registry of births, marriages, and deaths, reaffirmed not only secular jurisdiction over religious institutions, but also underlined the duty that titled physicians would have to carry out: to determine and register the cause of death of both urban and rural dwellers. This task would become an indispensable requirement for the elaboration of a broad and sustained national health statistical record.

During the 1860s, the National Academy of Medicine (preceded by the first and second Mexican Academies of Medicine, 1836 and 1851) began to publish the journal *Gaceta Médica de México* (1864). The National Academy members, strongly influenced by the birth of numerous European and U.S. scientific commissions and academies, as well as by the Scientific Commission of Emperor Maximilian (1864–1867), met to seek effective solutions to the proliferation of numerous communicable diseases. In their regular weekly meetings they examined the medical make-up of the country, in particular the unsanitary conditions of the capital city, the statistical records available, and discussed the latest theories and issues related to pathology, hygiene, legal medicine, statistics, veterinary medicine, pharmacology, physiology, and anthropology (Fernández del Castillo, 1956).

The preeminence that public health had acquired by the 1870s in numerous countries became prominent during the long Porfirio Díaz administration (1876–1880; 1884–1910) and General Manuel González's interregnum (1880–1884). As of the 1880s, a gradual centralization, professionalization, and expansion of medical services took place. This resulted as much due to Diaz's political aims as to the place that hygiene and the pursuit of health occupied in both national and international arenas (Tenorio Trillo, 1996). Sanitation—in particular urban sanitation—became key to the image of the modern city, and unprecedented investments in drainage and sewer systems, running water, garbage removal, and vaccination programs were destined for the capital, as well as in the main ports and most important provincial cities (Agostoni, 2003). This left the rest of the country in a primitive sanitation state and further highlighted the disparities between urban and rural areas.

During the Díaz regime titled physicians acquired unprecedented power and visibility as they wove the notions of order, hygiene, and progress into the discourse of modernity and of scientific understanding of society (Hale, 1989). Furthermore, at this time, numerous proposals for reform and legislative and bureaucratic practices rapidly expanded. In 1879, Diaz's administration redefined the function and objectives of the Superior Council of Public Health and it became the model to follow on matters of health and hygiene

throughout the country. Among the goals of the Superior Council, the following stood out: to regulate the sanitary conditions of food produced and sold, the hygienic conditions of houses, schools, jails, factories, and of any other place where people gathered, and to reduce the death rates from contagious diseases in Mexico City and the territories of Baja California and Tepic. To accomplish the latter throughout the country, the Superior Council determined that the nation required legislative change and the implementation of comprehensive public health legislation (Agostoni, 2003; Carrillo, 2002).

The Council thrived under the direction of physician Eduardo Liceaga (1885–1914), who strove to put into action a uniform and national health plan, to implement routine vaccination (in particular against smallpox and rabies), as well as to enhance sanitary cooperation with the United States, Canada, and Latin America (Liceaga, 1949). The extensive continental collaboration that took place in matters of public health policies and programs, and Liceaga's legacy and diplomatic acumen, were apparent during Mexico's participation at the First International Sanitary Convention of the American Republics, held in Washington DC in 1902, that established the foundation of the Pan American Health Organization, where it was resolved that the governments represented should employ similar measures to prevent the spread of yellow fever, bubonic plague, typhoid fever, and cholera, among others. It was also under Liceaga's leadership and supervision that Mexico organized the first successful campaigns against bubonic plague in Mazatlán and Baja California (1902–1903), against yellow fever in Veracruz (1903) (Sánchez Rosales, 2002; Carrillo, 2005; Carrillo, 2008), and against tuberculosis and syphilis in Mexico City (1907). Furthermore, in 1907 the Third Sanitary Convention was held in Mexico City. In that same year the country adhered to the International Treaty of Rome that established the International Office of Public Hygiene and enhanced constant communication among the main sanitary authorities of Mexico, Europe, and the Americas as the diversity of resolutions converged in attaining common goals. Those resolutions underlined among other topics the importance of medical death certificates, leprosy statistics, programs to control tuberculosis and syphilis, and sanitary regulation of food products.

The Díaz regime implemented series of sanitary codes (1891, 1894, and 1902) to insure that Mexicans enjoyed certain legal protection. Although the codes governed every aspect of health, it ultimately fell to each state to implement the precepts and regulations established by law, and indeed several states of the republic enacted their own sanitary codes inspired by the legislation applicable to nation's capital. These sanitary codes clearly determined which transmissible diseases were required to be controlled. Of these, cholera, yellow fever, typhus, smallpox, bubonic plague, syphilis, and tuberculosis stood out. The emphasis on these communicable diseases reflected the adoption of the bacteriological discoveries of the time, the relevance that laboratory based public health campaigns were acquiring, as well as the international and national collaboration that was required for the successful implementation of any public health program.

Another major concern during the final decades of the nineteenth century was what several observers regarded as the total absence of hygienic education or the lack of a "hygienic instinct" among the people (Parra, 1901: 500). Health and hygienic education were presented as keys that would transform the habits and customs of large sectors of the country's population. To that end, schools, teachers, physicians, domestic hygiene manuals, books, journals, and magazines—destined for an eminently illiterate general public, women, and future mothers—focused on practices perceived to threaten the science of hygiene. These were diverse and varied from one location to the next. For

example, the widespread practice of resorting to unlicensed midwifes and popular healers, the proliferation of patent medicines, and the increasing number of medical advertisements were regarded with enormous suspicion by titled physicians (Agostoni, 2002; Schell, 2004). Health education became an issue associated with other goals of order and progress in the country, an ideal clearly exposed during the Popular Hygiene Exhibition, organized to commemorate the Centennial Celebrations of Independence in 1910 (*Memorias del Primer Congreso Higiénico Pedagógico*, 1883; García, 1910; Silva, 1917; Agostoni, 2005). Nevertheless, health education and hygienic reform faced enormous limitations. The country displayed extreme disparities among the living conditions of both rural and urban dwellers, issues that led numerous observers to demand an end to the social inequalities prevalent in society.

Revolutionary Ideals and Public Health

On the eve of the Revolution, physicians and the health authorities inaugurated Mexico City's General Hospital (1905), and in September 1910 opened the doors of La Castañeda, the General Insane Asylum. In an era in which a person's reason was prized above all else, those suffering from mental illnesses stood in stark contrast to the idealized citizen. Mental patients could not, for example, own property, marry, or write a will. As scholars have shown, La Castañeda became in a way a "museum of insanity" in which those on the outside could peruse those who were unable or unwilling to cope with the demands of a modern world. With 24 modern buildings and the capacity to house nearly 1,200 patients, it became the largest mental institution in Latin America (Ríos Molina, 2009; Rivera Garza; 2001, 2001a). But the ordering of patients—mental and otherwise—spilled out into other areas of life. If diseases could be cured, or at least controlled, then so too could social practices and habits that fed the negative stereotypes of Mexicans as unhealthy, immoral, and profligate. A case in point were the syphilis campaigns of the 1920s and 1930s, when the health authorities attempted to inculcate among the young and adult members of society the revolutionary goals of anticlericalism, body discipline, nationalism, and interest in economic progress, targeting the sexual habits of women in an attempt to "sanitize Mexican moral, social, and domestic relations by ensuring the state's authority over private lives and family matters" (Bliss, 1999: 40).

Together with sanitation, the promotion of healthy habits, mental hygiene, and the control of communicable diseases, the fabrication, production, and distribution of serums and vaccines played a pivotal role in the gradual transformation of the public health agenda. The decisive basis of knowledge and techniques for the study of bacteria and the diseases they produced was made available during the middle of the 1870s, and the advances that followed during the next two decades led to the development of technical methods for the cultivation and study of bacteria, to the examination of the mechanisms of infection, as well as to the technologies for the prevention and treatment of contagious diseases. In 1905, under the leadership of Justo Sierra—who at the time headed the Secretaría de Instrucción Pública y Bellas Artes—the creation of the Instituto Bacteriológico Nacional was authorized, an institution that would have the responsibility of identifying the microbial causes of numerous human and animal diseases, and the fabrication of vaccines against rabies, chicken cholera, and smallpox, among others. The work carried out at the Instituto Bacteriológico came to have profound and practical impacts on the public health programs organized during and in the aftermath of the armed phase of the Revolution (1910–1920).

Hunger, chaos, unemployment, death, and the proliferation of infectious diseases were constant throughout the most violent years of the Revolutionary decade. Typhus, influenza, and smallpox, together with diseases of the respiratory tract, increased the mortality indexes of the country. The health authorities, under the leadership of physician and General José María Rodríguez as of 1914, deputy, close friend, and collaborator of Venustiano Carranza, implemented a series of forcible health campaigns in an effort to curtail the propagation of yellow fever in Veracruz, and smallpox, typhus, and influenza in the states of Tabasco, Hidalgo, Guanajuato, Puebla, San Luis Potosí, and Mexico City. These included home visits to identify and isolate any possible carrier, house-to-house disinfections, and forcible vaccination. Although the efforts to produce, distribute, and continue with the immunization programs were seriously curtailed, they were not halted. Vaccines were produced at the official centers of production located in Mérida, Campeche, and Guadalajara. In 1914, the Instituto Bacteriológico Nacional was incorporated into the Superior Council of Public Health and moved to Jalapa, Veracruz (until 1916), where bacteriological research and vaccine production continued. Furthermore, medical and vaccination brigades were set up throughout the major towns, and both the Mexican Red Cross (1905) and the White Neutral Cross (Cruz Blanca Neutral, 1911)—among others—provided the civilian and military personnel with medical assistance and services during the first decade of the Revolution. During these most violent years of the Revolution, José María Rodríguez established that in order to treat epidemics and to ameliorate the sanitary conditions of the country, the intervention of the national executive was indispensable. To that end he argued that what the country required was no other than a "sanitary dictatorship" (Aréchiga Cordoba, 2007).

In 1916, a critical assessment of the health conditions and sanitary campaigns undertaken during the Díaz administration was made public in Alberto J. Pani's *Hygiene in Mexico*. Pani regarded the Porfirian efforts as meritless and concluded that a radical overhaul of the public health and sanitation campaigns, procedures, and consideration should be implemented (Pani, 1916). The Carranza government's demands and expectations for the sanitary organization of the country were clearly expressed during the debates that took place in Querétaro during the Constitutional Convention: Article 73 of the 1917 Constitution guaranteed that Congress, not local or state entities, should be charged with enacting public health legislation. In addition, the Constitution established that the federal government should ensure that sanitation and medical services be made available to both the urban and rural populations. Backed by the Constitution, the national governments of the 1920s and 1930s resorted to public health as a tool to subsume individual and state rights, while defining what and how the practice of public health should be. Thus, the gradual transformations that began in the arena of public health during the final decades of the nineteenth century and during the armed phase of the Revolution, were increasingly presented as major obligations and achievements of the revolutionary movement.

Despite the deep financial and political difficulties of a war-devastated land during the early 1920s, President Álvaro Obregón named Gabriel Malda as head of the Department of Public Health (DSP) from 1920 to 1924, and called for a reconsideration of the importance that the promotion of the public's health would have for the future of the nation. The topic quickly became widely discussed in both political and medical national and international forums. Even though public health measures required expertise, personnel, and resources, the ideal of public health and of a comprehensive health reform became crucial to the goals, ideals, and ideology espoused by the triumphant revolution-

ary leadership. In an effort to make the precepts of good health as widely accessible as possible and to implement the government-led public health campaigns, the School of Hygiene (Escuela de Salubridad) was set up in Mexico City in 1922. Its aim was to train a vast sanitary personnel (bacteriologists, medical inspectors, visiting nurses, and vaccination agents, among others), with adequate preparation to carry out and implement the health policies and programs required to sanitize the country. In addition, several physicians—among them Miguel E. Bustamante—were sent to the most important medical schools in the United States—the Johns Hopkins School of Hygiene and Public Health, for example—to update their knowledge on public health administration so that popular health education, professional training, and the reorganization of permanent health departments could efficiently implement the programs required to sanitize the country (Bustamante, 1934).

Obregón's presidency welcomed the Rockefeller Foundation's International Health Board, the most important disease-control agency until the creation of the World Health Organization (WHO), into the country with the commitment to eradicate yellow fever throughout the states of Yucatán, Veracruz, Quintana Roo, Tamaulipas, Colima, and Sinaloa with the dictate: "Get rid of the yellow fever mosquito. Disregard the human host—the man sick of yellow fever—and concentrate on the control of the insect host—the mosquito" (Quoted in Birn, 2006: 53). The eradication measures demanded enormous resources, and were envisaged as part of a continental campaign against the disease that required the collaboration of local and federal health authorities, local physicians, and the general public. This collaboration would be of even more importance during the Rockefeller Foundation's hookworm campaigns that began in Mexico in 1923. The emphasis of the "Rockefeller medicine men" on mounting a mass attack on hookworm infection broadened into far-flung schemes involving demonstration projects and education on the national front. Although hookworm was not a particularly pressing source of mortality among rural dwellers, the campaign against it coincided with a series of rural social demands and acquired the patina of a revolutionary force (Birn, 2006). Mexico faced other more pressing health issues, such as malnutrition and lack of drinking water, that necessitated a radical overhaul of the social and economic conditions of both the countryside and the urban centers which, at the time, were simply not addressed.

Unequal medical services between urban and rural settings prompted numerous social observers throughout the 1920s, and in particular during the 1930s, to demand a solution to the unsanitary conditions and abandonment in which the vast majority of the nation's population lived. A significant moment for the future setting of rural medical services and health programs took place in 1926, when a new sanitary code was implemented, formulated according to the 1917 Constitution. The 1926 sanitary code established not only mandatory vaccination throughout the country, but also that Congress had the capacity to promulgate general and nationwide laws relative of the sanitary conditions of the nation. Local authorities should as thereof comply with the general dispositions promulgated and aid the federal health authorities at all times. To this end, the work carried out by the Service of Hygienic Education and Propaganda, the Service of School Hygiene and the Child Hygiene Centers created during the course of the 1920s, were of paramount importance (Agostoni, 2007; Aréchiga Córdoba, 2005; Schell, 2004). Of those educational services, only the first went beyond targeting the urban dwellers, and under the leadership of physician Alfonso Pruneda health authorities designed the first comprehensive rural health educational programs that were to be carried out through

physicians, visiting nurses, the use of magazines and radio, and in which the participation of the rural teachers was of particular importance.

The preponderance of these campaigns to enhance and ameliorate the health and sanitation conditions of the rural population was concomitant with a systematic attempt by the government to establish permanent sanitary services throughout the country. In 1933 the Department of Public Health created the Federal Sanitary Service in the States (Servicio de Sanidad Federal en los Estados) with the mission that all sanitary delegations in the country should pursue similar goals: to impart health and hygienic education, to collect statistical information, to identify and curtail the propagation of communicable diseases, to carry out sanitary inspections of food, as well as to enhance sanitary engineering and the availability of drinking water (Bustamante, 1934). Among the most pressing health challenges in the countryside were poverty, the lack of adequate means of communication, and the scant number of titled physicians that hampered any health initiative. In 1936, a decree issued by President Lázaro Cárdenas (1934–1940), established mandatory social service for all students graduating from medical, nursing, and dental schools. Future physicians were required to spend between six months to a year in a marginal rural community and aid in the vaccination campaigns against smallpox, detect and register any communicable disease, organize school, maternal, and infant hygienic education, and convince the general public not to resort to local healers and midwives, among other issues.

Education remained a crucial element for the attainment of the goals of the health authorities throughout the 1930s. Indeed, education became a fundamental requirement for obtaining the acceptance and collaboration from the public in, for instance, the national vaccination campaigns organized to control smallpox, a procedure that allowed the state to enter into private, formally restricted spaces. Furthermore, chief among the hygienic educational endeavors that sought to educate the inhabitants of rural, poor, and mainly indigenous areas and inculcate the gospel of health, was the melding of popular culture, technology, and health concerns through a series of films, some of which were commissioned from Walt Disney. The films covered a broad assortment of topics from hand washing, malaria, venereal diseases, influenza, typhoid, and vaccination. Taking advantage of a spate of new roads built in the 1940s, many short films were trucked to remote towns and clinics where they were shown to amazed villagers (Gudiño, 2009). In most of those films, some imported from the US and others produced by national health authorities, physicians, nurses, and sanitary agents—more than local politicians and priests—were portrayed as the knowledgeable authorities of rural areas. The message was clear: health and hygiene were the only ways to a modern, stronger and more "dignified" nation.

Health and Social Security

During World War II—when the country became immersed in a process of rapid industrialization and economic growth—political stability, national unity, and economic expansion became the driving forces of the nation. In the 1940s, the dramatic increase in revenues and the rapid transformations in the nation's social, demographic, and economic make-up, led to significant structural changes for public health. Not only did the health sector begin to receive more funding, but also new health and social security institutions were created. With the expansion of the economy during the war, the nation's labor force also grew. Accompanying this growth were demands to provide for the well-being of the nation's workers, fueled by national expectations and the example provided

by the consolidation of the welfare state in different parts of the world. Mexico's first national social security bill had been introduced in 1929, but it did not become law until 1942 and its services began on January 1, 1944.

The law guaranteed "medical, surgical and hospital assistance" for all qualified workers (Seguridad Social, 1952: 13). This was the first time in the country's history that social security programs were implemented on a national level, extending to Puebla and Monterrey in 1945, to Guadalajara in 1946, and to Orizaba, Veracruz in March 1947. To comply with the new legislation, both employers and workers in Mexico City, where the pilot programs were based, had to register and create a roster of eligible personnel. The roots of this new law are directly linked to the 1917 Constitution and, in particular, Article 123. This article established a broad series of guarantees for workers, among them that employers were responsible for work-related injuries and health problems caused by the job. In addition, employers were mandated to provide healthcare for the worker and, in some cases, his family. This revolutionized public health and the need for hospitals and clinics mushroomed.

In addition, in October 1943 the General Directorate of Social Welfare, that had overseen hospitals since 1877, merged with the Department of Public Health to produce the Secretariat of Health and Welfare (Secretaría de Salubridad y Asistencia, SSA). This meant that various health areas were now consolidated under one authority with federal reach. In addition, this period saw the emergence of specialized health units, including the Children's Hospital of Mexico City (1943), the National Institute of Cardiology and the Hospital de Enfermedades de la Nutrición (1944), all coinciding with the initial formulation of the Plan Nacional de Hospitales set forth by Gustavo Baz Prada. The Plan Nacional de Hospitales led to the project for a new General Hospital in Mexico City and to the construction of the General Hospitals of San Luís Potosí (1946) and Veracruz, among others (Homedes, 2006: 51). Furthermore, in 1943 the Mexican Institute for Social Security (IMSS) was created. The establishment of the IMSS made clear governmental interests in modernizing labor relations, a process that led to the division of the costs of social security between employees, the government, and the workers.

Nevertheless, the IMSS faced challenges from the beginning. Doctors had to be persuaded to join a government-subsidized and government-run healthcare system that had neither buildings nor equipment. In the early years, patients had the option of going to private doctors hired by the IMSS who were then reimbursed for their services. This arrangement mostly failed because workers felt discriminated against when compared to wealthier patients. The IMSS then installed emergency services in factories that would tend to immediate medical needs but, by the end of 1945, only 35 of these factory services existed. There were other challenges as well. Strict control of payments was still not in place and employers, as well as employees, needed to learn how to wade through the paperwork of letting the government know when an employee quit, was fired, or had a change in employment status. Since most employees did not remain in the same job during their lifetime, this required a level of organization that just did not exist at the time. All of this entailed the relearning of labor relations *vis a vis* the government with the new health provisions the priority.

In the Second Six Year Plan, President Manuel Ávila Camacho (1940–1946), declared that sanitary action must be one of the government's "most urgent and basic" goals (Alvarez Amezquita, 1960: vol. 2, 447). To this end all municipal, state, and federal government agencies were required to cooperate not only in providing the labor force for the sanitation endeavor, but also in helping to create a "public

consciousness" (or conscience) among Mexicans who might then be spurred to find a rapid and permanent solution to the nation's "grave" health problems. These problems were as varied as the socio-economic status of the patients. Yellow fever, malaria, tuberculosis, polio, leprosy, and STDs were but some of the categories that worried the government (Alvarez Amezquita, 1960: 448). Another constant concern was the lack of or deficient sanitation in rural areas. As researchers have shown, it became a growing concern in the 1940s when there were more than 70,000 settlements with fewer than 250 inhabitants that lacked permanent health units, hospitals, or qualified medical personnel and assistance (Whetten, 1984). An "experimental zone" in which personnel of preventive health and hygiene could work under the supervision of Secretaría de Salubridad y Asistencia physicians was proposed to remedy this problem. (Alvarez Amezquita, 1960: 530). This plan was hindered by doctors' predilection for cities. By 1946 the problem of the urban–rural distribution of doctors was again readdressed (Alvarez Amezquita, 1960: 530).

The first National Congress de Salubridad y Asistencia was held on August 25–31 1946 in Mexico City. The roster of speeches echoed the need to have a single governing body in terms of health and security and reflected the difficulty of coordinating various institutions with overlapping health goals. They also addressed continuing education for health professionals and the requirement to fund health programs through taxes (Alvarez Amezquita, 1960: 520–522).

Seemingly related to the return of bracero-workers between 1945 and 1946, polio became epidemic in 1948 throughout the states of Tamaulipas, Coahuila, Nayarit, Nuevo León, Chihuahua, Aguascalientes, and the Federal District. The situation led to the creation of the National Committee for the Fight Against Polio (Comité Nacional de Lucha contra la Poliomielitis) and the setting up of polio immunization programs throughout the country. Other vaccination programs, in particular smallpox immunization, were also persistent in both rural and urban settings. The last registered case of smallpox in Mexico was in 1952, a situation that led the health authorities to declare that smallpox had been eradicated from the country. Notwithstanding this important success, smallpox vaccination continued throughout the course of the 1950s and 1960s in order to guarantee levels of immunity; pesticides, such as DPT were administered in both urban and rural settings, and in 1963 "National Vaccination Days" were inaugurated throughout the country.

Steroid work conducted in Mexico City by a Mexican chemist, Luis Ernesto Miramontes contributed to research that led to mass production of cortisone in 1951 and, later, to the discovery of oral contraceptives (Soto Laveaga, 2005, 2009). Although these scientific breakthroughs revolutionized patent medication around the globe and gave women unprecedented control over their reproduction, Mexico saw few financial gains and Mexican women had to wait a few decades to see the government embrace oral contraception as part of family planning. But demographic changes were also modifying the responses that the country was required to adopt in the arena of public health. In the 1950s Mexico began its transition from a rural to a largely urban nation; by the 1960s most Mexicans lived in cities with more than 2,500 inhabitants.

In this period physicians, more so than the workers who are readily associated with the nation, unexpectedly became the front-line for the Revolutionary state (Pozas Horcasitas, 1993; Soto Laveaga, 2009). Problems began to emerge in the government health units where more was expected of physicians working there. The first strike involving IMSS doctors took place on October 19, 1945 protesting about the meager official wages they

received. The strike lasted a few days but the tension did not go away. In 1946, as the ranks of state workers were growing rapidly, there were only *two* IMSS clinics in all of Mexico.

In 1959, the Social Security Institute for State Employees (ISSSTE) was founded. It emerged as part of the continuing series of specialized institutes that guaranteed healthcare based on the type of labor. New qualified beneficiaries created new problems since there was "a great shortage of hospitals of any kind, including medium and poorly" equipped ones (Alvarez Amezquita, 1960: 531). From 1959 to 1964 the IMSS doubled its affiliates, and by 1970 more than 60 percent of the population received healthcare from social security institutions (Nigenda, 1997: 109).

The constitutional right to health mandate came to a head in late 1964. Less than 25 years after the creation of the IMSS, the system was already incapable of responding to national needs. Whereas past complaints had come from citizens seeking treatment, the criticism of the public health system now came from practitioners, the state health doctors. In November of 1964, IMSS residents and interns from the 20 de Noviembre hospital threatened to strike if a series of demands were not met. Of note is the nature of their requests. Many physicians called for better pay and better working conditions as well as the opportunity to continue their studies. The president violently suppressed the strike. Unemployed doctors would continue protests into the 1970s.

Attempts to deal with the inequities of treatment in public health led President Luis Echeverría (1970–1976) to create a series of institutes for rural care, and a series of new health codes implemented in 1973 established a new level of coordination and accountability between states and the federation. For example, the appearance of IMSS COPLAMAR (National Plan for Depressed Zones and Marginal Groups) in 1974 was aimed at fostering rural development. In 1983 an offshoot of the above programs put into practice an integrated health model which took advantage of all available medical resources, including traditional medicine. In just two years, between 1983–1985, the target population increased from 11.5 to 13.7 million participants (Flores Alvarado, 1989: 750).

Mexico's economic crises of the mid and late 1970s greatly affected public services. In 1981, President José Luis López Portillo convened a research group to determine how public health services could be made more efficient and how the national health system could provide universal coverage. The working group, led by future president Miguel de la Madrid, concluded that health services needed to be decentralized. When de la Madrid took office in 1982, he set about implementing his findings and, a year later, Article 4 of the Constitution was amended to guarantee health protection for all Mexicans. That year also saw the appearance of a new Health Law that ensured a division of responsibility between the national and state governments.

Neo-liberal Changes in Healthcare

Each successive financial crisis has directly and negatively affected health services with a decline in per capita expenditures. In the late 1980s poverty affected an astounding 51 percent of the population and unemployment continued to climb. To battle these increasing shortages a new program, Pronasol (Programa Nacional de Solidaridad), was created in 1988. Pronasol expressed the Carlos Salinas de Gortari administration's targeted approach to poverty, incorporated the former IMSS-COPLAMAR programs, and sought specifically to address questions of health, education, housing, and employment

among the urban and rural poor. Scholars found the impact of Pronasol to be quite limited because it tried to improve, but did not tackle, the root causes of poverty. Moreover, critics argued that it was mainly a repackaging of already existing welfare programs (Diaz Cayeros and Magaloni; 2004 and Dresser, 1994).

The 1990s again saw a shake-up of healthcare with plans to reorganize the system. Some of the most significant changes were the following: first, the emergence of AFORES (Association Funds for Retirement) that effectively transferred retirement and old-age pensions out of the IMSS and into a series of public and private organizations. Second, the creation of a provision that allowed employers to replace the IMSS with private healthcare plans. As seen in other countries, this option had the potential of leaving the elderly, the disabled, and the chronically ill vulnerable because private entities usually find ways not to provide health coverage for these subsets. Third the creation of decentralized Medical Units, clinics, and hospitals that provided services in their area to IMSS beneficiaries. In addition, there was the option for Mexicans who did not qualify for IMSS to purchase insurance to receive its services.

In the first decade of the twenty-first century, though many Mexicans enjoy healthcare through the IMSS, ISSSTE, Pemex, or the military, the vast majority of the population depends on the Public Health Sector (Sector Salud) for all their healthcare needs. From an epidemiological point of view, Mexico faces challenging problems. Global crises, like AIDS and environmental pollution, coupled with re-emerging diseases—cholera, malaria, tuberculosis, influenza—put strain on an already overburdened state. The unequal distribution of health services between urban and rural and northern and southern states has created severe inequalities that will take time, funds, and political will to overcome. For example, adult mortality in the state of Oaxaca "is comparable to that of India, while in the state of Nuevo León it is comparable to that of several European countries" (Lloyd, 2000: 129). However, Mexico continues to surprise in its struggle to provide healthcare for all.

In late 2008, Mexico garnered praise in the *New York Times* for the success of its Oportunidades program, an off-shoot of Pronasol's *Solidaridad*, which has been transplanted to one of the United States' largest metropolises with the name Opportunity New York (Rosenberg, 2008). Oportunidades consists of small cash transfers that focus on putting money in the hands of the very poor. Cash payments are given to mothers of children with good attendance records at school, those who participating in a series of hygiene courses, childcare programs, or simply for maintaining their children's up-to-date vaccinations. While the results have been astounding there are some problems. Namely that in its attempt to systematize medical treatments, the government funded program tends to reward and consequently sanction state health institutions over local or native healing practices. For example, as some Oaxacan midwives complained, the program dissuades pregnant women from seeking their help. Nevertheless, it is important to stress that while, during the course of the final decades of the nineteenth century and most of the twentieth century, an enormous effort was placed on importing and adapting foreign theories of health, hygiene, and sanitation and in allowing foreign philanthropic organizations to dictate some of the health goals of the nation, programs such as Oportunidades illustrate the feasibility and success of a Mexican model of public health.

Although most of the country's residents—in particular those of Mexico City—labeled the reaction of the federal health authorities as excessive during the outbreak of the A/H1N1 influenza virus in late spring 2009, the measures implemented demonstrated an unprecedented exercise of power in the arena of public health on the part of local and

federal health authorities. The influenza pandemic also made visible the numerous inequalities that persist in the access of the country's population to health services, the lack of public and private funding for vaccine research, production, and innovation, as well as the preponderant need for health policies and programs throughout the country.

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A Century of Childhood: Growing up in Twentieth-Century Mexico

ELENA JACKSON ALBARRÁN

"La nación de unos cuantos, la niñez idílica al alcance de unos cuantos."
—Carlos Monsiváis[1]

Mexican youth stole the show in an international children's art competition to illustrate the recently ratified Children's Bill of Rights in Geneva, Switzerland in 1927. They came away with the lion's share of the prizes awarded to contributors from over twenty nations. Epifanio Flores, a 14-year old from the largely indigenous neighborhood of Tlalpan in the south of Mexico City, won second prize worldwide, securing his place in the Mexican national media, and reaffirming his status as a child. *El Sembrador* published Epifanio's picture—a grave stare framed by straight black hair and a rumpled cotton collar and betraying the shadow of a moustache—alongside a laudatory description of his prizewinning drawing that, according to judges, reflected the ancestral sadness and the traditional pain of the race (*la raza*).[2] In many instances, a teenage indigenous boy would be well over the cusp of adulthood, already subject to social obligations that would position him to head up a family of his own and bear a man's share of household labor and income. Yet by merit of his artistic talent, Epifanio had earned himself a brief extension in the coveted position of protected childhood. Furthermore, for the judges, his indigenous identity lent an air of authenticity to his art that made it worthy of national representation in an era of heady *indigenismo*.

Epifanio's good fortune illuminates the complexities of defining childhood in the twentieth century. On one hand, inspired largely by the *raza cósmica* ideology promoted by José Vasconcelos, art educators expected their indigenous pupils to supply the nation with a nationalist aesthetic based on their perceived innate connection with local geography and ancient heritage. On the other hand, government officials saw Mexican children as living examples of the success of the revolution in all of its technical proficiency and modern advances, evidence of a state capable of constructing a modern citizenry on a par with that of leading world powers.

Revolutionary rhetoric espoused the construction of a new citizen, and officials funneled unprecedented funding and attention to child-related programs, institutions, and professions. Many of these efforts targeted young members of the popular classes and indigenous populations as part of an endeavor to incorporate them into a national culture defined largely by middle class mores and social codes. Child-centered reforms in the revolutionary era were not disseminated uniformly across the country, and in fact betrayed uneven treatment—both rhetorical and practical—of urban middle class, campesino, and indigenous children. This resulted in a national culture even further stratified by class and race, despite official rhetoric to the contrary. As a result, we have a kaleidoscopic vision of twentieth-century childhood rather than the singular national experience that the revolution purported to provide its new citizenry. Later in the twentieth century, the Mexican Miracle led to the simplification of these variously defined childhoods into a much clearer binary between the ideal and the unwanted child. Nevertheless, the abundance of cultural opportunities offered to disadvantaged populations, especially during the revolutionary decades of the 1920s and 1930s, allowed children like Epifanio to move within these fluid categories of race, class, and age.

1.   The History of Childhood

The history of childhood, an academic pursuit spawned in the mid-twentieth century, has sought to define the parameters of human experience as shaped by collective ideas about age. At the core is the assumption that children are not full-fledged members of society relative to adults. Philippe Ariès inaugurated the field with his classic *Centuries of Childhood*, in which he argued that medieval society did not conceive of childhood as a distinct social category, an assertion supported largely by his analysis of representations of children as miniature adults in medieval art and literature (Ariès 1962). Ariès's study was the first to examine children systematically as members of a social group, and was innovative in his use of visual and material culture as sources.

Despite these important advances in the field, scholars have recently generally rejected his claim that childhood is a construction of the early modern period (Heywood 2001). Furthermore, rather than relying on a normative definition of childhood that privileges presentist, Western, modern values, historians of childhood have moved to a model that requires greater cultural sensitivity and "historical empathy" (Stearns 2006). Pioneering explorations of the changing social value of children have led to the inclusion of age as a category of historical analysis in world history, revising Ariès's beleaguered assertions to account for cultural, geographic, and temporal variations (Cunningham 2006; De Mause 1974; Fass 2006; Stone 1977; Zelizer 1985). American historian Steven Mintz, who traced the changing manifestations of childhood over the course of three centuries, advocated adopting a bifocal approach to writing the history of childhood that examines both the structural forces fashioning children's experiences, and the unanticipated ways that children dart among the trusses of this structure (Mintz 2004, 2008). The field is currently enjoying a revival that places children at the center of historical inquiry (Marten et al. 2009; Sánchez-Eppler 2005; Heywood 2008).

In Latin America, the history of childhood began to emerge as a distinct field as recently as the 1990s (Premo 2008). Many studies examined the intersections of the state, family, and children as a way to understand the promotion of public order as a feature of modernity (Guy 2000; Milanich 2002; Windler 2003). For many historians, children's voices remained elusive; children did not enter the historical record frequently

unless they had been abused, abandoned, killed, or otherwise exploited. Consequently, scholars dismissed systematic treatment of children, citing a paucity of sources. Recent scholarship has uncovered the surprisingly rich archival presence of children in the past (Hecht et al. 2002). The most innovative studies about childhood helped to establish a methodology by reconstructing some of the characteristics of children's everyday life from elements of material culture (Zumbano Altman 1999).

2.   Childhood in Mexico before the Revolution

Little information exists on pre-Hispanic childhoods. Native groups across Mesoamerica that relied on corn for subsistence developed a gendered division of labor; mothers drew their little girls into the female sphere of domesticity by burying the umbilical cord under the *metate*, presaging a lifetime of slavery to the grind (Bauer 2001). Later, in Aztec times, community leaders exhorted their young with the ritual reading of the *huehuetlatolli*, a speech elaborating the expected behavior of the ideal boy or girl, a tradition carried on well into the sixteenth century (Lipsett-Rivera 2002). Immediately following the conquest of New Spain, colonial families found themselves grappling with the diverse but often compatible native and Spanish notions of family and childhood. The Spanish brought their Catholic model of a nuclear, patriarchal family and sought to recreate the family unit as quickly as possible as a symbol of their intent to stay and colonize the Crown's newfound acquisition. Well-to-do parents commissioned portraits of their children primarily as proof of the social status, legitimacy, and lineage of the family. As these disparate native and Spanish traditions quickly mixed through generations of strategically crafted unions and illicit couplings, the visibility of offspring became crucial in creating social and economic lineages and status.

For New Spanish children, colonial administrators established legal stages of growing up: the first three years fell under the care of the mother for basic feeding and socialization; after this age, children were the responsibility of the father; at age 7, children reached the age of religious consciousness and *uso de razón*—technically, of marriageable age; by age 10, the child could be legally punished for crimes. Youngsters did not reach full maturity under the law and autonomy from their parents until the late age of 25 (Lipsett-Rivera 2002). In law, colonial childhood remained a rigid category, yet colonists of all ages proved adept at slipping across legal social boundaries (Twinam 1999).

The Bourbon Reforms, primarily the work of Charles III and Charles IV, ushered in Enlightenment ideas and socioeconomic changes that reverberated throughout the colonies. They also changed significantly how children were both viewed in society and portrayed for posterity. The Enlightenment recognized children as individual rational beings who required a formal education and moral socialization from an early age to make them into productive citizens (Stearns 2006; Katzew 2004). The Enlightenment not only emphasized the individual, but also initiated the decay of a lineage-based view of children. In New Spain, reformers promoted not only education but also motherhood, supported by welfare programs to ensure the proper training and care of children. Some politicians anticipated a transition from empire to republic (Lipsett-Rivera 2002). This shift in policy resulted in increased government intervention in the family, as it increasingly became the unit for the enforcement of colonial order (Gonzalbo Aizpuro 1998).

As racial fluidity threatened to upset the colonial social order based on rigid understandings of racial categories, creole artists produced casta paintings, didactic illustrations of the social outcome of nearly every racial mixture possible in the colonial

population. Historians gleaned much about colonial childhood from this unparalleled genre of paintings produced in the late-eighteenth century, as they contained vivid images of tidy nuclear families in informal settings and surrounded by the richly detailed material trappings of their daily life (Katzew 2004). Admittedly, the paintings projected the ideal family envisioned by creoles that comprised an orderly society. But the unselfconscious presence and vitality of children in the paintings provides a barometer of their visibility in daily life and the importance of recognizing their pastimes alongside those of their parents.

Institutional history, especially documents produced by Church and private welfare institutions, illuminates the shifting value of children in different social circles. The theme of child circulation—passing children among people and institutions as changing socioeconomic stressors affected the family—unites colonial and nineteenth-century historiography on children. During the colonial period, Elsa Malvido found that in the rural areas, private networks mediated by the Church funneled "surplus" children born to Indian parents without the means to support them into the workforce (Malvido 1992). In this agrarian society, children formed part of the workforce. They represented a valuable commodity that the local government willingly took from the hands of needy parents. In urban areas, illegitimacy resulted in more common child abandonment. Legitimate children signaled honor in a world that valued honor as the highest form of social capital, while children born out of wedlock needed to be shielded from view in elite circles. The welfare institutions created by both the Church and the viceregal government served to protect the bruised honor of aristocratic maidens more than to provide systematic care for the children. Nevertheless, many illegitimate children were insinuated into the homes of their biological parent through informal relationships such as servant, godchild, adoption, or apprentice (Gonzalbo Aizpuro 1994). Such arrangements reveal that the status-conscious creole elites also felt affection and obligation toward their offspring and sought to keep them near.

The use of hygiene and medicine in the nineteenth century as lenses through which to view children replaced the piety model of the earlier period. Institutional histories provide the bulk of what we know about childhood during this century (Blum 1998). During the Porfiriato, as socioeconomic divisions grew deeper, parents deposited more children in government-funded asylums. Welfare institutions continued to uphold the colonial ideal of children as linked to or symbols of honor, even when secularizing Liberal legislation refashioned family law and charity.

A new class of foreign-trained child professionals rendered children the subjects of medical scrutiny during this time through the production of specialized knowledge about the child's body and psyche. The *científicos*, positivist advisors to Díaz, included a cadre of clinical physicians dedicated to lowering the infant mortality rate, one of the essential indicators of modernity. Medical pamphlets, children's clinics, and advice columns to mothers constructed children's physical bodies as a testament to the health of the family (Del Castillo Troncoso 2006).

The Porfirian era witnessed the first boom in children's culture, mirroring trends in the industrializing world. The Victorian ideal of childhood enjoyed great currency, albeit largely limited to the upper strata of society. The leisure class not only had time and energy to indulge their children, but also new and improved technologies that made these public displays of affection more visible. Studio photography and *cartes de visite* provided parents with the opportunity to pose their elaborately dressed and coiffed children as precocious little adults in this modern iteration of the colonial painted portrait.

The printing press, now with the ability to reproduce images in dailies, publicized these photographs as a visual homage to the brief span of life that corresponded to innocence and recreation (Del Castillo Troncoso 2006; Levine 1989; Monsiváis 2005; Monroy Nasr 2006; Sánchez Calleja and Salazar Anaya 2006). Imported European manufactured playthings flooded department stores that architects had enlarged with new floors to accommodate the influx of consumer goods (Bunker 2006). Magazines and newspapers took out ads with graphics that appealed to children, directly addressing them as consumers. For the first time, publications expressly for children appeared in newspaper kiosks: *Álbum de la infancia*, *Su majestad el niño*, *El Correo de los Niños*, and *Biblioteca de los Niños* numbered among the dozens of options for young readers with time and pesos to spare (Lombardo García and Camarillo Carbajal 1984). The Porfirian-era idealized childhood did not reach the countryside, and for many children there life went on much as it had in the colonial era.

3.   The Emergence of the "Active Child," 1920–1940

One of Ariès' most contentious assertions is that the social importance of children is measurable by evidence of parental affection; defining childhood as a sentimental stage of life betrays a particular bias toward a Western, modern, middle class construction of what it means to be young. A closer look at the cultural history of twentieth-century Mexico, and particularly evidence left by and about children, indicates the diverse constructions of childhood that marked the revolutionary century. In many cases, adults carefully crafted a set of ideas about what it meant—or should mean—to be a child, based on evolving scientific, medical, and pedagogical knowledge. In other cases, children themselves helped to define their emerging place in society. Mexican childhoods included that of the protected idealized child established during the Porfiriato and transformed slightly by revolutionary officials, that of the urban child working on the streets and in the informal economy, and that of the campesino child working in the fields and in the household (Alcubierre and Carreño King 1997). All of these roles existed as part of a more complex set of social relationships and situated children within a broader "domestic economy" (Blum 2010).

The revolution shook many rural children from their routines. Those who stayed at home saw the older generation disappear, and they prematurely assumed the household responsibilities of adults. Fighting and death disrupted the school calendar and razed school buildings. Yet the disappearance of a sentimental, protected space for children affected by the revolution did not mean that they did not experience another variety of childhood; those who accompanied their family members to fight the revolution—especially among *villistas*—assumed menial roles appropriate to their age that reaffirmed the importance of recreating the semblance of a family structure away from ancestral lands. Children who had never left Guerrero, Jalisco, Sonora, or Morelos took up arms and fought alongside their fathers, traveled on the backs of their *soldadera* mothers, and rode trains and donkeys to far-flung battlefields (Alcubierre and Carreño King 1997). By their visible presence in this stage of the fighting, amply documented in revolutionary-era photography, children became synonymous with the nation that the revolutionaries hoped to construct.

After the fighting subsided, government officials went to work to create a citizenry from the bottom-up that would adhere to the ideals set forth in the Constitution of 1917. Foremost in their efforts was the legal definition and organization of young people

into identifiable social groups and reduction in the visibility of the popular classes of children, especially in the cities. Legislation emerged to regulate child labor, establish a juvenile courts system, and create formal adoption procedures (Bliss 2001; Blum 2010; Sosenski 2006, 2008). Revolutionary governments emphasized the creation of institutions to correct and educate wayward children as an investment in the Revolutionary Family's future inheritance.

The education sector most actively incorporated children into civic life. A heavy emphasis on *civismo* during the revolutionary period drew upon teaching philosophies established in 1888 by Porfirio Díaz's Minister of Education Joaquín Baranda (Schell 2003). In fact, many scholars have pointed to the continuities between Porfirian and revolutionary education programs (Vaughan 2006). Yet innovations from the desk of José Vasconcelos, who headed up the Ministry of Education (SEP) from 1921–1924 during its best-funded years, privileged John Dewey's "action pedagogy" as a method for teaching child-centered civic engagement. In 1925, the SEP promulgated a Children's Moral Code, intended for children to read aloud at the beginning of the school day in classrooms nationwide;[3] some interpreted this as an example of the state assuming parental authority over their children (Schell 2004). The SEP expended an enormous amount of energy and resources in the early revolutionary decades to establish the child as a metaphor for the nation, a being that could be molded and trained to fulfill its potential. Often, however, the state project broke down on the local level, as individual schoolteachers, parents, and children interpreted official mandates and programs through their own cultural filters (Vaughan 1997; Waters 1998).

Historians reconstructed aspects of childhood prior to 1920 based largely on sources produced by institutional officials, legislators, and artists—all adults. For the years 1920 to 1940 it is possible to study events from children's perspective because so many children entered the historical record either due to the sheer growth of the bureaucratic machine during these years (leaving more documentation) or by means relatively unmediated by adults. A number of factors contributed to the proliferation of sources produced by children during these decades. Not only did government agencies, and especially the SEP, create cultural programs and school curricula that revolutionized childhood, but modern technology also facilitated the ways children could leave evidence of their history. Photography became cheaper and easier. It allowed the visual documentation of more informal activities in which children engaged. The widespread use of typewriters—available in public squares for those who did not own one—expanded the volume of correspondence. Children learned to type as they learned to write (Gallo 2005). Revolutionary presidents made themselves more readily available to the general public, provoking a flood of letters from people of all ages making requests to which they believed they were entitled after the revolution. As a result, beginning around 1920, children were seen and heard as never before in the country's history (Albarrán 2008).

The intensity of revolutionary education reform led to a greater sense of civic entitlement as children became aware of their rights as well as their duties to the country. As civic culture became imbued at all levels, citizens began to express confidence in their due inheritance as members of the Revolutionary Family in the form of direct petitions to government officials, often cutting straight to the desk of the executive office (Nava Nava 1994). Not too long after the revolution, we see examples of children sufficiently emboldened to address educational officials and presidents directly and express their demands. For example, during a routine visit in 1937 to one of the dozens of public

welfare schools for street children established in Mexico City, some of the children approached the inspector with an enumerated list of complaints and demands about their food, clothing, school supplies, and even allowances. Most significantly, the children's first complaint was that they be allowed an officially sanctioned avenue through which to express their needs.[4] In another instance, a group of child members of their school's Health Committee wrote a letter to the public welfare office requesting the donation of an emergency health kit and a guest visit from a doctor in anticipation of the upcoming Hygiene Week.[5] One group of students from Cananea, Sonora wrote to President Plutarco Elías Calles in 1925, confident that their common regional heritage would ensure the fulfillment of their request of a new library, some clothes, and recreational items for their physical education program. They went so far as to direct the president regarding the most efficient shipping methods to their remote locale. The students made sure to cite their allegiance to the country, assuring Calles that their organization existed only for the glory and betterment of the Patria.[6] The rhetoric contained in such letters affirms the fact that many children participated in and understood the growing trend of cultural nationalism that defined the revolutionary decades (Albarrán 2008; Pérez Montfort 2003).

Children became the subjects of high profile professional conferences—notably the First Mexican Conference on the Child in 1921 and the VII Pan-American Child Conference in 1935, both hosted in Mexico City—that featured scientific findings from leading eugenicists, hygienists, pedagogues, and pediatricians (Guy 1998, Stepan 1991). These conferences yielded a number of empirical studies and programs designed to quantify and perfect the child. The Pan American Child Conferences revealed the changing paradigm of child welfare after the revolution that placed the child, and not the family, at the center of reform and policy initiatives. Conference delegates turned to the whole child as a model, a member of his or her family, classroom, and community, but almost wholly perfectible through guidance by medical, psychological, and education officials.

Children also became more visible as public, political beings as the Revolutionary Family expanded to incorporate previously disenfranchised citizens into the fold. They began to interject their own voices into the revolutionary discourse of the day, particularly due to the efforts of a SEP agency, the Department of Civic and Social Action (changed to the Department of Social Action under President Lázaro Cárdenas in 1937). They participated visibly in the anti-alcohol campaigns accelerated by President Emilio Portes Gil, in parades, drawing competitions, and photographic propaganda (Pierce 2008). They also took the reins in advancing Mexico's literacy rate at the behest of educational officials by assuming young educator roles in the Children's Literacy Army, in which children as young as eight years old earned the title of Honorary Professor by teaching their peers the rudimentary skills of reading and writing.[7] Student council organizations cropped up in classrooms across the country, and assumed characteristics of their adult political counterparts, but engaged in activities for the improvement of their immediate infantile environments. Young board members found opportunities to exercise an early political career as they assumed the bureaucratic trappings of their offices, from the delegation of responsibilities to the use of letterhead (Albarrán 2008).

Admittedly, often children's public political personae served primarily symbolic purposes. The First Proletarian Children's Conference, a vehicle intended to promote elevated class-consciousness in children, overlapped the VII Pan-American Child Conference,

and spawned regional and similarly-themed children's conferences throughout the year across the country (Albarrán 2008). Children participated in every level of the conference, through public speaking competitions, round-table discussions, and panel-style presentations. The national media appeared in droves, and the demands and concerns of self-described proletarian children made their way onto the national airwaves and the press. While evidence suggests that many of the children's performances benefited from the heavy editorial influence of adult supervisors, nevertheless children emerged as public advocates and role models for their peers, as schoolchildren from around the country tuned in to the conference proceedings. Future generations understood, through observing the rhetoric and actions of their spokespersons, that adults would take children seriously as contributing members of society, and began to understand the public nature of citizenship.

It is important to note that, despite the significant democratizing accomplishments of revolutionary governments in the 1920s and 1930s, especially in the area of public education, many children still remained outside the scope of the projects discussed here. Even new forms of media like the radio, expressly created to transcend socioeconomic and geographic boundaries, remained accessible primarily to middle class children in the cities. In some cases, when opportunities to peruse second-hand illustrated magazines, for example, did present themselves to children in the countryside, they did not have the leisure time to write letters to the editor or participate in contests for prizes (Albarrán 2008). SEP publications like *El Sembrador* and *El Maestro Rural* honed in on the literate agrarian population as a site for the construction of an idealized "revolutionary campesino" identity (Palacios 1998); likewise, parallel publications for children such as *El Niño Proletario* and *Pulgarcito* demonstrate clearly distinct roles for campesino and urban middle class children in the Revolutionary Family. The Boy Scouts, largely comprising privileged children with leisure time, divided into "explorer tribes" that identified with different national ethnic groups (Nahua, Otomí, Tarasco, etc.), learned some of their traditions, and recreated some of their cultural celebrations. Yet indigenous children themselves often did not have the opportunity, nor the free time, to join the Boy Scouts; revolutionary intellectuals considered indigenous children to possess an innate understanding of the natural history, geography, and ancestral culture that middle class children learned as part of a national cultural curriculum. This bifurcated approach to children of different social categories resulted in the reification of campesino and Indian children as part of a body of popular stereotypes that became consolidated during the 1920s and 1930s (Pérez Montfort 2003). Acknowledging the limitations of revolutionary cultural campaigns is essential to understanding the uneven construction of a generation.

As we have seen, the construction of childhood took multivalent forms in the 1920s and 1930s. Yet a trend can be identified, as the era saw a shift away from the Porfirian discourse of an idealized childhood, characterized by protection from the incursions of adult worries into a space of childhood innocence. Rather, revolutionary officials promoted the ideal of the "active child," a citizen in training that assumed civic responsibilities and participated in the betterment of his or her own environment. This new idealized child became visible on local, national, and international levels as unprecedented opportunities arose for civic engagement. During these decades, many children saw themselves not simply as members of a biological family, but as members of a social group of their peers with a particular set of demands, concerns, and capabilities that defined them as distinct from their adult counterparts.

4.   Children and Youth Culture during the Mexican Miracle

As the momentum of the revolutionary decades ground to a crawl with the rightward shift of the Cárdenas administration, the ideal "active child" gave way to a modern version of childhood that returned children to the domestic sphere. Most significantly, the administration of President Miguel Ávila Camacho radically reduced government spending on education and brought the socialist education experiment to a halt. Rural schoolteachers' livelihoods had been slim even during the generous Cárdenas years, and when faced with a combination of drastic cutbacks and withering ideological support from the central government, schoolteachers withdrew from many areas of the countryside and allowed extracurricular programs to dry up. Education became more centralized, and the curriculum reflected the urban bias that the SEP began to take, a shift away from the regionalist interpretations of educational programs that had characterized the period from 1921–1940 (Vaughan 1997, 2001).

The Catholic Church regained footing in cultural arenas, and children represented one of the principle social groups over which conservative groups asserted a measure of cultural control. The government, headed by self-proclaimed believer Ávila Camacho, ceded a great deal of control over the instruction of the nation's children to religious organizations following two decades of strictly anti-clerical educational policy—although admittedly the Church had never fully withdrawn from education, despite the secular mandate stipulated by Article 3 (Schell 2003; Ford 2008). Beginning in the 1940s, the state and Church entered into a feeble alliance over the socialization of children, and much of the ideological fervor surrounding the "active child" dissipated.

Consumer culture had characterized the urban middle classes since the early days of the Porfiriato, but in the 1940s shoppers saw more advertisements than ever enticing them to enter the fray of American-style consumption of goods (Bunker 2006; Moreno 2007). Prior to 1940, the state manipulated much of children's popular culture through SEP-funded vehicles. But after 1940, the massification of culture and the unchecked influence of U.S.-style consumerism, furthered by Rockefeller's Office of the Coordinator of Inter-American Affairs in collaboration with Disney, added a transnational element to children's cultural milieu (Joseph, Rubenstein and Zolov 2001). Children were in no way immune to the rash of mass marketing that reached them through new forms of popular media. Much of the public discourse about childhood after 1940 reverted to a time of life defined by recreation, protection, and assimilation to a middle class consumerist culture. Nationalism did not die, but it became subsumed within the broader transnational context—the popular radio personality, singing cricket Cri-Cri, seemed an awful lot like Jiminy Cricket; and the cartoon children in Nestlé ads in juvenile magazines looked an awful lot like Dick and Jane.

Even as rampant urbanization led to a concentration of children's popular culture around urban, middle class themes—and the abandonment of the idealized proletarian child as a metaphor for revolutionary nationalism—a new class of children re-emerged in the public eye: street children. Studies of quotidian life, artistic and anthropological, revealed that the Mexican Miracle did not bring prosperity to all citizens. American photographer Helen Levitt poignantly documented the squalor in which many Mexican children were mired during a summer-long excursion to Mexico City in 1941. Her Mexican counterpart, Nacho López, famously revealed the gritty realities of growing up in Mexico City's streets in the 1950s through images of dirt-smudged children playing with rodents in the absence of the Cinderella toys for sale in the windows of Sears

department stores. Luis Buñuel burned an image into the collective memory of the unlucky, unloved, and utterly abandoned street child as a legacy of the failed Miracle in his iconic 1950 film *Los olvidados*—appropriately translated into English as *The Young and the Damned*. Anthropologist Oscar Lewis delved into the disparities that marked the increasingly stratified social classes in his longitudinal study of Mexican daily life over the course of the 1950s and 1960s; his conclusions, though heavily revised by subsequent scholars, reflected contemporary disillusionment with the government's ability to fulfill revolutionary promises to the youngest generation (Lewis 1959). He showed a youth culture—both in the impoverished and well-to-do families—that was utterly apolitical and disengaged from civic activities, preoccupied either with survival or with playtime, a far cry from the proletarian youth of the 1930s. Even José Vasconcelos, the erstwhile SEP secretary and most eager proponent of radicalizing childhood in the 1920s, betrayed his disillusionment at the loss of a national culture in which the state and citizenry joined forces to raise young Mexicans in a safe, ideologically sound environment. In 1946, he penned a short stage melodrama entitled *Los Robachicos*—the child stealers—in which he dramatized the dangers of urban life through accounts of children whisked from the safety of their Mexico City patios, brutally disfigured or blinded, and exploited by a ring of child traffickers who blended into the growing urban landscape of beggars and transients. Vasconcelos based his play on sensationalized accounts of such events unfolding in the news, and used it as a platform to decry the decay of the Mexican Revolution; he bemoaned Mexicans' apathy toward the situation, citing for comparison the public outcry that engulfed the United States at the disappearance of the Lindbergh baby, as evidence that the nation had lost respect for its most valuable resource (Vasconcelos 1946).

For much of the second half of the twentieth century, children's culture became both specifically defined in opposition to, and increasingly eclipsed by, the emergence of a new social category: adolescence. Teenagers provided a buffer of ambiguity between childhood and adulthood. In the 1960s, prep school teenagers began to develop autonomous social and political lives in opposition to the conservative, middle class upbringing that their parents had so carefully constructed for them in the delicate Miracle years (Zolov 1999). The 1989 film *Rojo amanecer*, a dramatic account of a middle class family on the day of the October 2, 1968 student massacre on the Plaza de Tlatelolco, showed the marked social differences between the younger and the older children in the family. While the younger children led protected apartment-dwelling lives defined by penmanship homework and toy soldiers, the older children disregard their parents' warnings and become politically involved in the growing student protest movement. Their pamphlets, long hair, Che Guevara posters, and choice of companions all contribute to the culmination in which government thugs slaughter the entire family. The final scene, which shows the youngest boy wading through pools of blood in the Tlatelolco apartment complex, spoke to a less hopeful vision for the future generation than prevailing images of the previous decades.

Over the course of much of the twentieth century, the concept of an idealized childhood prevailed. The image of a nation capable of offering a protected, sheltered childhood to its youngest members suggested the broader image of stability and civilization that Mexico sought to project from the Porfiriato. Yet during the revolution, children took on a new significance. For a few brief decades, children became not just symbols of the revolution or metaphors for the nation, as some have suggested, but also found meaningful ways to exercise the rites of citizenship. Due in large part to ample

funding and creative programming on the part of the SEP, multiple versions of the ideal child emerged in the 1920s and 1930s that all contributed to the formation of national identity. The new Mexico would be an amalgamation of all of these types; though far from a classless society (despite socialist education rhetoric to the contrary), each social class would play a valuable role in the success of the nation. The urban middle class child learned about new technologies and public speaking in training for global competition. The campesino child learned agricultural techniques that would yield the most produce from the nation's soil. The indigenous child bore the not-insignificant burden of representing the nation's unique ancestral past, the standard-bearer of ethnic and cultural authenticity. This child learned to represent these traditions through artistic production.

During the Mexican Miracle, these three visions of childhood that occupied the public imaginary gave way to a stark binary between privileged and disenfranchised children. Urbanization, commercialization, and transnational influences all contributed to a depoliticization of revolutionary childhood. Children's popular culture burgeoned as commercial, private, international, religious, and state sectors all competed for their attention through a mounting barrage of cultural stimulation. By the end of the twentieth century, many Mexican children could access the same sources of entertainment as their counterparts in Japan, Sweden, or the United States. Much of what differentiated Mexican children's culture from the rest of the world became lost in the globalized economy. Yet vestiges of children's culture that emerged in the 1920s and 1930s, the heyday of revolutionary nationalism, can still be seen in textbooks, holiday parades, candy wrappers, and television shows.

5.   Notes

1   Carlos Monsiváis, *Quietecito por favor!* (México: Grupo Carso, 2005): 202.
2   "Entre niños de veinte naciones, triunfaron los niños mexicanos," *El Sembrador,* No. 6 (July 5, 1929): 11.
3   Part of the Código de Moralidad de Niños reads, "In my school they teach me that boys and girls who want to earn their name as good Mexicans must learn to be strong, useful, and worthy of their country, so that it might prosper and grow." *Boletín de la SEP*, Tomo IV(7): 109–110.
4   Escuela Hogar Liberación, July 1937, Archivo Histórico de la Secretaría de Salud, Sección Beneficencia, Subsección Establecimientos Educativos, Serie Escuela Hogar Liberación, Caja 1, Expediente 6, 1938.
5   Sociedades de Estudiantes, Beneficencia Pública, Archivo Histórico de la Secretaría de Salud, Sección Beneficencia, Subsección Asistencia, Serie Departamento de Acción Educativa y Social, Caja 4, Expediente 12, 1937.
6   Sociedad de Alumnos "Infantil Cultura," February 12, 1925, Archivo General de la Nación, Fondo Obregón-Calles, Expediente 805-H-101.
7   *Boletín de la Universidad* [Órgano del Departamento Universitario y de Bellas Artes], IV Época, Tomo II, No. 4 (March 1921).

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¡De Pie y en Lucha![1] Indigenous Mobilizations After 1940

MARÍA L. OLIN MUÑOZ

During the 1950s, the Huichol indigenous people from San Sebastián Teponahuaxtlán in the central western state of Jalisco rose up against local non-indigenous ranchers believed to have encroached on their communal lands. Led by Pedro de Haro, the Huichol challenged not only non-indigenous civilian encroachment, but also defended their community against President Miguel Alemán's administration (1946–1952), which sent military surveyors to Huichol territory to divide lands for military colonists and other buyers.[2] The mobilization of 150–200 Huichol men in defense of village land highlights a period during twentieth century Mexico most often relegated to studies of urban poverty and labor relations. The event demonstrates that, while indigenous peoples were no longer a priority in terms of social focus for government programs, they were not completely out of official government concern. In addition, indigenous peoples continued to pressure local and regional government officials in a number of ways. In terms of mobilizations we must shift the historical gaze away from that focused solely on independently coordinated efforts or involving aggressive and violent actions. Rather, we must view mobilization as encompassing the breadth of strategies developed by indigenous groups and communities in their attempts to protect land, petition for government development programs, and exercise their full citizenship rights.[3]

Understanding the context of indigenous mobilization after 1940 requires consideration of the politicization of ethnic communities during the years of revolutionary social programs between 1920 and 1940. The emphasis was on the pacification of the country and the institutionalization of revolutionary ideas. Revolutionary ideals sought to address two issues: on the one hand was a campaign to refine the new national identity in both political and cultural terms. Although represented as a policy of inclusion, the program of mestizaje, as put forth by José Vasconcelos in his 1925 *The Cosmic Race*,[4] was not exactly one to include indigenous peoples into the revolutionary nation as indigenous peoples. It required instead the transformation of indigenous peoples into a political and cultural Mestizo identity. At the same time, it required the creation or adaptation of an

economic development program that would raise the living standards for all citizens, including indigenous peoples. These two goals did not always coincide.

Indigenous communities had a major role in national foundation ideology and indigenous projects were woven into the revolutionary fabric. While the indigenous population appeared as objects of revolutionary propaganda, contemporary indigenous peoples were not involved in the process of creating the policies that affected their lives, at least not directly.[5] Official indigenismo intended to transform Indian peoples into citizens of the imagined Mestizo nation. Especially during the 1920s, the ambitious nationalization program used rural and urban education as its primary instrument of such change. This education did not only rely on instruction in the traditional classroom[6] but also utilized visual culture in the form of mural projects on public buildings as well as photographic media. This Mestizo nation was not just an imagined one, as both biological miscegenation and cultural hybridity would also produce the Revolutionary Mestizo.

Despite revolutionary policies, the issues that caused conflict remained the same throughout the twentieth century. The most pressing of these were political and social exclusion and disputes surrounding land. The social programs of the Lázaro Cárdenas presidency (1934–1940), as well as his politics of inclusion, created expectations with regard to the beneficiaries of the Revolution's social program. These expectations remained unfulfilled when Cárdenas shifted his economic policies largely to the city and industrialization after 1938. For the three decades after the Cárdenas presidency promises for land reform and citizenship rights remained unfulfilled for most of the indigenous sector. Instead they witnessed government programs grow thin as federal government attention shifted toward the cities and ignored the countryside and its residents.

Continued social and political exclusion, combined with economic marginalization and an indigenist policy that sought to transform Indians into Mexicans by attacking their way of life, created intense external pressures on indigenous communities. By the 1960s, indigenous groups were no longer willing to remain in the political and social shadows, content with minor government subsidies. By 1970, it became clear to President Luis Echeverría (1970–1976) and his government that this issue should be reexamined, and outdated official policies revised to fit the changed realities. Even with this renewed government interest, indigenous peoples continued to organize and, in the process, their efforts shaped indigenous policy well into the 1980s and 1990s. The scope of their actions varied from armed action to organizational strategies within government agencies as well as through grassroots organization.

From the 1917 birth of the revolutionary constitution to 1934, government officials attempted to draw indigenous communities into national society through education. Few indigenous organizations arose during this period specifically because the focus remained on education rather than land holdings, which required that indigenous communities form ejido groups as campesinos. During the Cárdenas presidency (1934–1940), specific and centrally coordinated efforts were carried out to deal with the problems indigenous communities faced in their path toward a homogenous national identity. The primacy of education as the tool by which to sculpt the modern citizen was replaced, or at least matched, by land distribution. After 1934, material conditions were also considered when examining the dire economic and social conditions of indigenous groups. In addition, vigorous efforts to organize ethnic communities were undertaken as cardenista officials recognized that the problems indigenous peoples faced, although not unique, placed them at a political, social, and economic disadvantage.

Cárdenas created the Department for Indigenous Affairs (DAI: Departamento de Asúntos Indígenas) in 1936 to provide more specialized assistance and achieve effective assimilation programs. The DAI reported directly to his office. One of its first duties included the organization of regional indigenous congresses that began in 1936 and continued through the mid-1940s. These meetings represented a new policy to enable indigenous individuals to directly appeal to the federal government for assistance as Indians and not as campesinos.

Indigenous groups in the Central and the Southwest regions in the late 1930s and early 1940s used government sponsored regional congresses not only to present grievances but also to set up to the organizations used in some cases to pressure national, regional, and local government officials for assistance. Perhaps the most influential, and certainly the most enduring of these organizations, was officially established at one of the congresses held in northern Mexico.

At the 1939 regional congress held in Guachochi, Chihuahua, the Tarahumara (Raramuri) officially established a Supreme Council—the adopted name for this new indigenous institution. These Supreme Councils were not traditional forms of indigenous government, but rather a structure the federal government hoped would redefine the process by which officials dealt with indigenous groups. Although the regional congresses intended, among other things, to create a permanent relationship between indigenous groups and the national government through the creation of Supreme Councils, few initially survived. Supreme Councils collapsed in most areas when the national government shifted its attention to World War Two and indigenous communities had the opportunity to reject the new governing structure.[7]

Although further research is necessary to understand the ways indigenous communities organized beyond peasant leagues during the 1920s and 1930s, it is worth noting that the Unifying Society of Peoples (SURI, La Sociedad Unificadora de la Raza) emerged as an indigenous organization during the Cárdenas administration. Little is known about its function and membership,[8] but it represents a significant departure from cardenista policies in that it was one of the few indigenous, rather than campesino, organizations that existed during that period.

During the 1940s and 1950s, a number of indigenous organizations emerged, many under the protection of government agencies. Indigenous peoples, by participating, did not just fulfill official agendas but also promoted their own interests. The National Confederation of Indigenous Youth (CNJI), and the National Confederation of Youth and Indigenous Communities (CNJ y CI) emerged under DAI but they disappeared when the Department was dismantled in 1946. The National Union of Indigenous Organizations (UNOI) emerged to replace them.[9] These organizations relied on government agencies for continued funding, but their significance should not be discounted with regard to establishing the precedent for indigenous organizations within government offices.Further examination is necessary to understand their role in expanded indigenous mobilizations.

In 1968 indigenous individuals organized the Mexican Association of Indigenous Professionals and Intellectuals (AMPII). Its members argued that the federal government continued to rely on outdated and harmful policies regarding indigenous peoples. They demanded the direct participation of indigenous professionals in the crafting of new policies.[10] Their actions reveal divisions based on class and can perhaps be likened to W.E.B. DuBois's vision of the Talented Tenth.[11] That is to say, this group believed that, as educated Indians, they were the most qualified to direct changes. Because they had been educated

in the Mestizo world and had become somewhat acculturated, they believed they could provide viewpoints for change that were not possible for either government officials or uneducated indigenous peoples. These professionals encountered resistance from less professional indigenous leaders, the bilingual promoters, who also sought to revise the governmental program of indigenismo. These bilingual promoters succeeded in the creation of the National Council of Indigenous Peoples (CNPI) in 1975.

Refugees of the failures of the indigenismo (and in turn, the so-called revolutionary) project arrived in Mexico City during the 1960s. Mass migrations of Mazahua from Mexico State, Nahua from Tlaxcala and Puebla, and Otomí from Hidalgo, Queretaro, and Mexico State to Mexico City visibly challenged the highly urbanized cityscape painted by the brush of the Mexican Miracle in the downtown and upper and middle class neighborhoods. Many indigenous peoples who had migrated to Mexico City during the 1930s and 1940s had quickly adopted non-indigenous attire and learned Spanish and had been transformed into cultural Mestizos. The new wave of indigenous migrants were illiterate, uneducated, spoke little Spanish, and the women made no change from their traditional brightly colored blouses, skirts, and stereotypical braids.[12]

Indigenous women who arrived to the metropolis in the 1960s shocked upper and middle-class Mexicans, who met Indians "live and in color" walking the streets selling fruit, seeds, and gum. These female vendors, known as "las Marías", wandered through middle and upper-class neighborhoods selling their products without male companions. Most of them had husbands, known as "Joseses," who worked in factories or on construction projects where they were less visible. These men wore work clothing so they did not stand out in the way "las Marías" did. Upper and middle-class Mexicans had a newfound curiosity about these hardworking women who struggled to make a living. This urban generation no longer viewed indigenous peoples as simple and backward, but admired their impressive work ethic and their noble character.[13] Beyond reflecting the failure of the economic Miracle to improve the lives of rural Mexicans, this migration demonstrated the failure of mestizaje itself. In spite of characterizing indigenous peoples as culturally different to facilitate the expansion of social programs, the case of "las Marías" demonstrates that indigenous peoples existed outside the transformation project.[14]

The migration forced government officials to re-examine indigenismo policies to update them to the realities of indigenous peoples. The indigenismo programs adopted during the Avila Camacho (1940–1946) and Alemán years (1946–1952) were outdated and failed to address the growing population, the declining available land, and the reduced water access in the countryside that increased hardships and forced waves of migration into the cities. Moreover, as the economic boom slowly came to an end, more workers existed than available jobs in the cities.

Despite limited government funding, indigenous groups did not shy away from trying to obtain what was available from government officials. These early mobilizations shaped the contours of Echeverría's participatory indigenismo. His policy stemmed from a number of factors, including indigenous peoples themselves.

Model of Indigenous Mobilization: The Tarahumara Supreme Council

Some indigenous peoples, like the Huichol of San Sebastián Teponahuaxtlán led by Pedro de Haro, turned to violence to defend their interests when nothing else worked. Others utilized different tactics. During the 1940s and 1950s, perhaps the most interested and

active individuals in these matters were indigenous teachers and professionals trained in the Casa del Estudiante Indígena and boarding schools. The first President of the Tarahumara Supreme Council, Ignacio León Ruíz, exemplified this pattern.[15] For three decades, from the 1940s through the 1960s, the Tarahumara Supreme Council held regional congresses to press both federal and state governments for the construction of schools, protection of forests, extension of credit, improvements in communications and transportation, and approval of land petitions. Although the Tarahumara regional congress was held during the Cárdenas period in 1939, the organization of the Sierra Tarahumara drew on a variety of origins.

After 1930, several Tarahumara governors attempted to extend their authority beyond the boundaries of their communities to control larger geographic regions. The mountains split the region between lowland and mountain communities, making complete control of the region impossible. Realizing the improbability of complete control, three of the more powerful governors and elders—José Járis Rosalío, who was widely acknowledged as the area's patriarch and controlled Norogachi region; Jose Aguirre who controlled the Guachochi region; and Esteban Cruz who controlled Cabórachi and Tecorichi regions—boldly joined with a group of young Tarahumara leaders to organize the Sierra. By 1935, most Tarahumara graduates from la Casa del Estudiante Indígena, created as part of the 1920s education initiative, returned as rural teachers to the Sierra Tarahumara. Ignacio León Ruíz, Patricio Járis Rosalío (son of Tarahumara patriach José Járis), and Santiago Recalachi García emerged as leaders of the youth movement. Along with José Járis Rosalío, Aguirre, and Cruz they led plans to organize a single governing body for the Tarahumara communities.[16] In this regard, Tarahumara leaders moved ahead of government efforts to organize indigenous communities, even before the Department of Indigenous Affairs (DAI) was created in early 1936, and the first regional congress was held in September of that year under Cárdenas in the State of Hidalgo.[17]

By early 1938, León Ruíz and José Jarís led the Tarahumara Regional Congress Organizing Committee that called the first Tarahumara regional congress in 1939 in Guachochi.[18] Each ranchería or Tarahumara community was allotted six delegates, one of which had to be a woman. Originally named the Permanent Commission of the First Congress of the Tarahumara Race, what eventually came to be known as the Tarahumara Supreme Council (CST) was established in the midst of conflict between Tarahumara communities and local Mestizo ranchers and farmers in Guachochi. The youthful Ruíz was elected its first president, but shared leadership responsibilities as the three Tarahumara governors (Járis, Aguirre, and Cruz) remained close advisers. This arrangement combined traditional leadership with the new Supreme Council structure. This complementary arrangement, perhaps most importantly, bridged generations, uniting the older governors with the emerging younger educated group. In some ways, the political marriage reconciled revolutionary changes and lessen the impact of government modernizing policies in rural regions. That the Tarahumara patriarch, José Járis, would send his own son to la Casa del Estudiante Indígena, signified that he recognized both opportunity and change.[19] By choosing to adopt a new form of leadership, the Tarahumara did so on their own terms. For the elders it was an astute move to retain influence and power in the face of change driven by the younger group; for the younger generation, access to the Supreme Council became an opportunity to gain local power but also the ability to represent the future of the Tarahumara in legitimate ways in the presence of state and federal government officials. Likely the governors recognized the potential for redefining their relationship with the government through this young

group of educated leaders. Ruíz served as president until his death in 1957. Of the twelve members of the Tarahumara communities who attended la Casa del Estudiante Indígena and returned to the Tarahumara after 1931, three (León Ruíz, Santiago Recalachi García, and Patricio Járis Rosalío) were original members of the CST.[20]

León Ruíz constantly worked to secure government funds for education and health projects as well as access to farmland and heavily forested areas in the Tarahumara. He also became an advocate for the protection of all Tarahumaras against Mestizo encroachment of lands and demanded justice for victims of violence. He worked tirelessly to highlight the importance of education by building schools in the region. He became one of the founding directors of the *internados* (residential schools) in Tónachi (1933) and in Norogachi (presently Siquirichi, 1935). Beyond his commitment to the Tarahumara locally, he understood that to effect change he would need to move into local and regional political posts. His political career included service as municipal president of Batopilas from 1940–1942 and as Congressional Deputy in the State of Chihuahua from 1953–1956.[21]

His leadership was important in setting up the Consejo Supremo Tarahumara as one of the most important vehicles with which to pressure the federal government for material and legal support. Most indigenous Supreme Councils created by the regional congresses of the 1930s faltered, proved ineffective, and eventually disappeared after 1940, while the CST remained a central organization within the Tarahumara communities. Following the 1939 Congress, the CST continued to organize its own regional indigenous congresses in 1941, 1947, 1950, 1957, 1959, 1972, and 1977. These lasted between 3–4 days, with sessions held from sunrise to sunset, with breaks for lunch, and with music and matachin danzas in the evenings.[22]

Upon his death in 1957, León Ruíz left a strong legacy of achievement secured through the Supreme Council structure. And although it was viewed as a federal government initiative, the structure had worked well in securing benefits for Tarahumara communities because its leaders understood the ways it could work to their advantage. Cárdenas's vision for the ability of indigenous communities to organize effectively among themselves was achieved by the Tarahumara, who perhaps exceeded expectations. Through the CST the Tarahumara made headway with regards to land tenancy, access to seeds for planting, securing more teachers and building of schools, construction and improvement of roads, establishment of telephone lines and health centers, access to medications, improvements to the internados, and exclusive access to forested areas. The organization also served to create a unified front against Mestizo farmers and ranchers responsible for the encroachment on Tarahumara farmlands and forest areas.[23]

In the 1950s, the federal government, through the National Indigenous Institute's (INI) regional coordinating center, emerged as a major support for the goals of the CST. The Indigenous Coordinating Center (CCI), a regional branch of INI, was established in August 1952 in response to the demands made during the fourth Tarahumara Congress in 1950 for improved federal support.[24] But it served only eight of the existing nineteen municipalities in the Sierra. Most indigenous communities were ethnically Tarahumara with a few Tepehuanes, Pima, and Papagos sprinkled throughout the region. Of the 29,668 indigenous peoples the CCI was supposed to provide support for, only half were bilingual, the rest were monolingual and certainly not Spanish speakers.[25] The language barriers became significant as a number of CCI workers spoke only Spanish, which limited the reach of the agency within the region.

Eventually the presence of INI in the Sierra began to eat away at traditional forms of government as recognized by the governors and the now established CST. In addition, following León Ruíz's death, Recalachi García took the reigns of the CST and directed the organization towards an affiliation with the local agrarian league of the National Peasant Confederation (CNC) established in 1938.[26] Not all Tarahumara were in agreement with the move as they were competing with campesinos for limited resources. In 1959 Eleuterio Rodriguez Calleja became president of the CST, and while the CST officially retained its autonomy during the 1960s it became increasingly bureaucratized, thus slowly pushing out the base of elder Tarahumara governors and reorganizing its structure.[27] Throughout the 1960s, the Tarahumara Supreme Council became closely linked to the CCI and rural teachers began to seek leadership positions within it. This ushered in a new generation of Tarahumara leaders.

The Seventh Tarahumara Congress was held in 1972 with significant popular participation. On January 27, 1972, more than 12,000 Tarahumara, Pima, and Tepehuanes gathered in Guachochi. One hundred and ten indigenous governors were among the thousands of participants. The participants had personal and political disagreements, but in public they presented a unified front, which they regarded as absolutely necessary for survival in the Sierra Tarahumara.[28] This congress and its widespread participation demonstrated the resiliency of the Tarahumara Supreme Council and its ability to keep its influence current. It should not be a surprise that it served as a model for the organization process of the 1970s.

By this time, the old Tarahumara guard had slowly stepped back from leadership positions within the CST allowing an emerging new group of leaders to take responsibility for continuing the legacy of indigenous organization that the CST had come to represent. Rodriguez Calleja passed on the presidency of the CST to Samuel Díaz Holguín, a Department of Agrarian and Colonization Affairs (DAAC) bilingual promoter.[29] Yet, Rodriguez Calleja, Patricio Járiz Rosalío, and Francisco Bustillos Jiménez remained as advisers to Díaz Holguín and his cabinet.[30] For the Tarahumara, as for most indigenous and rural communities, a primary issue continued to be the expansion of large land estates absorbing Tarahumara land. Continued exploitation of forest areas through illegal logging, primarily carried out by outsiders, was intensive and resulted in noticeable environmental damage as well as income losses for Tarahumara communities.[31]

The situation became so dire that the CST was summoned to a meeting with President Echeverría just a couple of days after the closing ceremonies of the regional congress. The Tarahumara governors and CST leadership traveled to Mexico City where they met with Echeverría in Los Pinos[32] and explained their situation. The meeting resulted in the federally-funded development program, Plan Tarahumara.[33] For the remainder of 1972 and into 1973, Plan Tarahumara focused on construction of fifty new schools, the founding of a residential school in Turuachi, and the planting of walnut, apple, and peach trees for local consumption and trade. Additionally, the National Company of Popular Subsidies (Compañia Nacional de Subsistencias Populares-CONASUPO), the federally subsidized food program,[34] granted credit for the operation of nine stores in the Sierra Tarahumara to the amount of $340,000 pesos.[35] Also, Plan Tarahumara created the company, Forest Products from Tarahumara (PROFORTARAH) that placed a large sector of the dense forested region of the Sierra Tarahumara in the hands of the CST.[36] Once again, through the CST, the Tarahumara managed to access federal funds and in the process set the precedent for similar programs in other indigenous regions: Plan del Valle del Mezquital, Plan Huicot, Plan Tarasco, and Plan Seri.[37]

El Parte-aguas: Watershed of Indigenous Mobilization, Post-1970s

After 1970, the political stirring of indigenous communities erupted and forced government officials to address demands for economic, social, and political improvements. In 1974, in Chiapas, a regional indigenous congress was held to commemorate the 500th anniversary of the birth of Fray Bartolome de Las Casas (1474–1974). Heading the Committee was photographer and philanthropist Gertrudis Duby, Governor of Chiapas, Dr. Manuel Velasco Suarez, and the Director of Chiapas State Indigenous Affairs, Angel Robles.[38] Understanding the limitations of state organization, Robles turned to Bishop Samuel Ruiz to organize Tzotzil, Tzeltal, Chol, and Tojolabal indigenous groups. A series of sub-congresses occurred locally in late 1973 and early 1974 in preparation for the main event. Over a thousand indigenous participants attended the congress in 1974.[39] President Luis Echeverría sent a telegram dated October 14, 1974 expressing his support for the event.[40]

Critics have charged that the declarations that emerged from that meeting were limited and lacked political depth,[41] but in many ways they revealed the needs of the indigenous peoples in Chiapas. Lack of medical attention and access to medications led to demands for health improvements. Concerns over commerce reflected the lack of job availability and abusive middlemen that stunted the local economy. Chiapanecos were also aware of the importance of education for the improvement of their lives in economic, social, and political terms. Finally, land continued to be the most important issue as sustenance was tied to it. Even if they did not frame their demands in political terms they certainly were in that they touched on needed land reform policies, funding for health clinics, and education programs.

The First National Congress of Indigenous Peoples was held a year later in Janitzio, Michoacan.[42] Planned since 1971, and funded by the federal government, the National Congress was intended to serve as a controlled space for expression of grievances by representatives of indigenous communities. It brought together indigenous groups from all over the nation. Sixty-eight delegations rode buses provided by government agencies to reach the site of the Congress. The number of delegates alotted— most ranged between fifteen and forty representatives—depended on the population size of each Supreme Council.[43] Newspaper articles and official documents estimated the overall attendance of at least 2,500 indigenous representatives.[44]

The Congress provided indigenous leaders with an opportunity to challenge the power of the national government by making demands for political self-determination. The declaration for indigenous autonomy was made through the national government's own program. Indigenous leaders recognized the National Congress as an opportunity not merely to express their concerns and make economic demands, but also to boldly voice the need of indigenous peoples to become active participants in the crafting of federal policies intended to address their demands. Additionally, the National Congress gave birth to the National Council of Indigenous Peoples (CNPI), which served to pressure federal and state officials on behalf of indigenous interests. The CNPI adopted the Supreme Council structure as the representative body utilized both to represent individual community interests to the Council and to communicate and distribute information and funds to communities from the CNPI. The organization disbanded by 1984, but during its short existence managed to set the foundation for the emergence and expansion of other indigenous-based organizations. The National

Council and the National Congress in 1975 left a legacy that included a blueprint for how to organize within government agencies and create alliances. Their significance should not be measured by their short life-span nor the mistakes made, but rather by the possibilities they demonstrated by actively engaging in the construction of national policies and programs.

Some groups argued that the CNPI as an ethnic organization needed broader support. Members of CODREMI, the Defense Council for Human and Cultural Resources of the Oaxaca Mixe, argued that allowing peasants into their movement would strengthen their goals. They pointed to the success of the Coalition of Workers, Peasants, and Students of the Isthmus (COCEI) also in Oaxaca,[45] the Emiliano Zapata Peasant Union (UCEZ) in Michoacán, Campamento Tierra y Libertad Veracruz, Revolutionary Front of Guerrero Public Defense, Zacatecas Popular Front, and in Morelos a number of rural organizations led by Mateo Zapata, the son of agrarian icon, Emiliano Zapata (Coordinadora Nacional Plan Ayala).[46] These organizations combined indigenous and campesino identities to forge a strong union in order to pressure for social improvements, political access, but above all, land.

After 1975 indigenous mobilization and organization increased. Demands for material improvements were paired with cultural demands, such as bilingual and bicultural education. Ethnic identity became a strategic tool for indigenous communities but also for the non-indigenous. For example, the Emiliano Zapata Peasant Union (UCEZ) in Michoacán, included campesinos who did not identify as indigenous peoples but chose to be part of the group to satisfy interests they could not protect individually. UCEZ made demands for bilingual and bicultural education as well as land and water access, while representing itself as an indigenous organization to pressure local and federal government officials. Although leaders of the group viewed themselves as indigenous, the fact that local campesinos joined, although not necessarily identifying as P'hurépecha, reveals the complex individual strategies for using class and ethnic identity to achieve individual and community goals and interests.[47]

The names of these organizations were strategic as well. By using Zapata and campesino, the largely indigenous organization drew on the revolutionary legacy of land reform and justice. Additionally, by using the term campesino they could also build a broader base of support for their cause and attract non-indigenous membership. While some campesinos continued to struggle to retain the political capital that was slowly slipping away, others viewed membership in indigenous organizations and movements as viable ways of protecting themselves and their families while making demands for land, access to credit, and potable water sources. By joining these organizations, they chose to represent themselves as indigenous, even if they did not consider themselves as such.

The CNPI disappeared, but its members continued to make attempts to resurrect a national level indigenous organization such as the Coordinadora Nacional de Pueblos Indigenas, that curiously adopted the same CNPI acronym. The Cordinadora Nacional de Pueblos Indígenas emerged as an offshoot of the CNPI led by a group of Nahuatl speakers and Populucas from Veracruz, Yaquis from Sonora, Zoques from Chiapas, and Chinatecos from Oaxaca. Genaro Dominguez, who had been part of the CNPI[48] led various former CNPI members who left for the Coordinadora Nacional and the Coordinadora Nacional Plan Ayala (CNPA).[49] The Coordinadora Nacional faced the new economic and political reality after 1982 when national economic recession led to

drastic cutbacks in government social programs. In addition, the increased number of peasant and indigenous organizations resulted in greater competition for the diminished funding available by the mid-1980s. The Coordinadora Nacional continued after 1983 to demand land, fair prices for basic necessities, and credit, and to denounce government corruption, repression, and the austerity policies adopted by President Miguel de la Madrid.[50]

During the early 1980s, indigenous organizations also took the form of cooperatives, which focused on environmental protection and local production but also proved capable of political mobilization. Such cooperatives included Light of the Mountain (Guerrero) and Union of Communities from the Isthmus (UCIRI- Oaxaca), both of which produced and sold organic coffee. The Union of Vanilla Producing Communities from Chinantla (Veracruz), Cooperative Tosepan Titataniske (Northern Puebla), and Cooperative Flor del Valle (Hidalgo) emerged to protect their community interests.

During the mid-to-late 1980s, indigenous organizations making demands for land began to use the language of human rights, claiming indigenous peoples should be respected. Such organizations included the Union of Communities from the Northern Isthmus (UCIZONI), the Organization of Indigenous Doctors from the State of Chiapas (OMIECh), the Assembly of Mixe Authorities (ASAM), and the Independent Peasant Union 100 Years of Solitude (UCI 100).[51] These organizations, grassroots in nature, continued to pressure local, regional, and federal government administrations for economic, social, and political rights.

Government spending geared toward social programs for the indigenous sector was reduced further after 1988 when President Carlos Salinas de Gortari's PRONASOL (National Solidarity Program) redefined its relationship with indigenous communities. Under PRONASOL, the federal government interpreted indigenous communities as independent and capable of carrying out their own economic development, effectively cutting the few social programs left intact under De La Madrid's administration. In political terms, the amendment to Article 4 of the Mexican Constitution of 1917 ended official mestizaje by declaring Mexico a pluri-ethnic, pluri-cultural, pluri-lingual nation. While some critics view this amendment as a shrewd political move by the federal government to justify the shift away from social programs after 1988, others have understood this move as one brought about by the pressure of indigenous mobilizations and their demands to be viewed as equal members of a national community, as indigenous peoples not Mestizos.[52]

In January 1994 a group of indigenous peoples from the southern State of Chiapas mobilized to draw attention to their plight. Their armed uprising, perhaps not the same as the Huichol four decades early but clearly in the same category of armed action, called national and international attention to the roles of indigenous peoples in society. Weary from years of federal government failing to live up to the promises of economic improvement and political inclusion, and threatened by local violence and the probable loss of land and further decline of living conditions via the North American Free Trade Agreement (NAFTA), a group of ethnic-Maya took arms against the threat to their livelihood. The Zapatista National Liberation Army (EZLN) made demands for land, jobs, improved housing, bilingual and bicultural education, as well as self-determination and respect for human rights.[53] These were old demands framed for a new generation, as indigenous leaders had been making similar demands since the 1940s merely in a different manner.

Conclusion

During the twentieth century, indigenous groups made demands for land, protection of natural resources necessary for their subsistence in rural areas, and in urban spaces pushed for the expansion of social programs. After the 1960s those demands came to include issues surrounding bilingual and bicultural education, and preservation of ethnic identity became an important aspect of the response to an aggressive mestizaje mission. By 1975 the issue of self-determination, the right to make decisions about their lives, and also participation in the ways indigenous roles were socially and politically constructed, were pushed to the forefront of indigenous mobilization.

By the late 1980s, independent and government based mobilizations were not enough to push forward their demands. Yet, in spite of efforts to gather indigenous organizations under one umbrella, no Pan-Indian movement emerged. The demands and interests of indigenous groups and organizations were broad and dealt with on local, regional, and national levels. Thus, it was difficult to integrate all indigenous groups into one cohesive mobilized group. Although the EZLN has managed to grab the attention of national and international audiences, it represents only four ethnic groups (Tzotzil, Tzeltal, Chol, Tojolabal) leaving out others like the Lacandon, Zoque, and Mam in the state, not to mention countless others across the nation.

The differences in geography, ethnicity, ideologies, economic and political interests across local, regional, and national levels dictate whether indigenous mobilization takes the shape of armed defense, like the Huichol and EZLN, grassroots organizations like COCEI and CNPA, or acceptance of government support like the CNPI. Indigenous communities today continue to pressure government officials at all levels to improve living standards while also redefining their roles within the nation.

Notes

1 CNPI (National Council of Indigenous Peoples) slogan 1975–1984.
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13   Arizpe, 23–25; Arizpe explained that the popular television character of the 1970s known as "la India María" was molded after these women. La India María's films reflected social issues that indigenous peoples faced in urban and rural settings. The comedic films satirized the daily trials of an indigenous woman, often playing a maid in upper-class homes, whose life, although filled with hardship, demonstrated a hard-working woman facing discrimination.

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20   Congreso Supremo Tarahumara, 11–13.

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29   Merino Rascón, 33.

30   Consejo Supremo Tarahumara, 24.

31   Bonfil Batalla, *Archivo Guillermo Bonfil Batalla, CIESAS-DF, Caja 63*.

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33   López Velasco, 19.

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CHAPTER THIRTY SIX

Mexican Immigration
to the United States

TIMOTHY J. HENDERSON

The U.S.–Mexican border, which came into existence in 1848 with Mexico's loss of its war with the United States, is an invisible line stretching for nearly 2,000 miles through hot, rugged scrubland and desert. For several decades after its formation, the border was largely the domain of hostile Indians, bandits, cattle rustlers, and smugglers, and although it was at times a major irritant in U.S.–Mexican relations, few could have foreseen that, by the end of the nineteenth century, changes in Mexico and the southwestern United States would initiate one of the most massive and sustained migratory flows in human history.

Origins

Porfirio Díaz, who ruled Mexico from 1876 till 1911—the period when Mexican migration to the United States first became significant—sought to "modernize" Mexico by constructing railroads and other infrastructure, replacing subsistence farming with commercial agriculture, and developing mining and industry. During the 1880s, the Mexican Central Railroad first linked Mexico City to the U.S. border via southwest Texas; soon spurs and rival railroads linked all of central Mexico to the rail system of the United States. Railroads linked Mexico's regions to its ports as well, causing a spike in land values and sparking a boom in commercial agriculture. That, in turn, inspired greedy landowners to usurp land from peasant villages, deepening the misery of the country's rural population.

Conditions for Mexico's rural poor—roughly 80 percent of the country's population—declined precipitously in the late nineteenth and early twentieth centuries. Mexico's population grew rapidly, swelling the ranks of the unemployed and underemployed, while the cost of corn, the staple of the poor, rose by 50 percent. Drought was a severe and recurring problem. Thousands had little recourse but to migrate to the cities or to the relatively prosperous north of Mexico, from whence it was an easy next step to the United States where there was a high and rapidly growing demand for cheap, unskilled labor. (Reisler (1976), Cardoso (1980), McWilliams (1968))

In 1910, Mexico was suddenly plunged into a bloody, chaotic, and prolonged revolution, which turned an already harsh situation into an unmitigated catastrophe. Agriculture virtually ground to a halt as revolutionary armies, brigands, and marauders ravaged the countryside. Corn prices soared again, and real wages dropped by three quarters. Perhaps a million people flooded into the United States during the decade from 1910 to 1920. (Cross and Sandoz (1981), Cardoso (1980))

There were many attractions north of the border, even beyond the chance to escape the horrors of the revolutionary decade. Railroads provided jobs for Mexican workers, and they also connected the regions of the United States, opening eastern and midwestern markets to produce from the West and Southwest. The Newlands Reclamation Act of 1902 provided large-scale federal funding for irrigation projects in the American West and Southwest. Suddenly millions of acres of former wasteland yielded tons of sugar beets, cotton, grapes, melons, lettuce, spinach, cucumbers, and citrus fruits. The advent of refrigerated railroad cars made it possible to ship produce over vast distances. In 1900 the southwestern states accounted for practically none of the produce sold in the markets of the Midwest and East; by 1929, they accounted for 40 percent. At the same time, new technologies led to a boom in copper and coal mining in New Mexico, Arizona, Oklahoma, and Colorado, and new employment opportunities emerged in the steel, textile, and meatpacking plants in the Midwest.

All of this, of course, provided a potent magnet for immigrants. In the early twentieth century, the Southwest was sparsely populated, so farmers and mine owners were desperate for workers, preferably ones willing to work for a pittance. The boom in the Southwest coincided with growing U.S. hostility toward Asian immigrants, theretofore a major component of the labor force. The Chinese were excluded from 1882, and in 1907 the United States pressured Japan to stop issuing passports for migration to the United States. Adding to the anxieties of southwestern growers was the U.S. entry into World War I, which saw the conscription of around a million U.S. citizens and the mass migration of impoverished African-Americans and whites to northern cities in search of factory work. For the Southwest, Mexicans became practically the only source of labor. Not only that, the growers professed to see in Mexicans traits that they greatly admired. Mexicans, according to a 1907 edition of the *California Fruit Grower*, "are plentiful, generally peaceable, and are satisfied with very low social conditions." (Reisler (1976) 6) For Mexicans, the attraction was obvious: While Mexican farm laborers earned around fifteen cents a day in Mexico, in the United States an unskilled farmhand could earn up to three dollars a day.

Prior to 1917, there were few impediments to Mexican movement into the United States. As demand for Mexican labor rose, an extensive recruitment system developed, with companies establishing contracting offices in major border towns and launching their propaganda into Mexico. In 1917, a new Immigration Act principally sought to bar people who were "likely to become public charges." Migrants had to pass a literacy test and pay an $8 head tax upon entry. Such conditions were onerous for many poor, illiterate Mexicans, but there was little to prevent them from entering the United States illegally. The modest restrictions passed in 1917 thus began the durable phenomenon of the so-called "illegal alien," more colloquially known as the "wetback" (so-called because many migrants had to swim the Rio Grande in order to cross the border).

Modest though they were, efforts to contain Mexican immigration were met with passionate protests from southwestern growers and other powerful economic interests that had come to depend on the cheap labor. The growers persuaded the government

that their labor needs were acute and a matter of national security. Their entreaties led to what is sometimes called the "first *bracero* program" ("*bracero*," derived from the Spanish word for "arms," usually denotes an unskilled farm laborer). In May 1917, the literacy test, head tax, and all other restrictions were waived for Mexicans who sought to enter the United States to work in agriculture for six months or less. Although employers moaned about the bureaucratic red tape that sought to safeguard the rights of workers, the first bracero program proved popular enough that it was extended till 1922, three years after World War I had ended. By that time, more Mexicans than ever before had experience in the United States, and they spread the word to friends and family. In this way, the temporary guest-worker program served as a catalyst for future immigration.

The 1920s and 1930s

Mexico continued to endure economic hardship during the 1920s. Wartime demand for its raw materials evaporated while, at the same time, revolutionary reforms got under way. An agrarian reform program was undertaken, designed to uplift peasant villagers by providing them with lands from large haciendas, but the process was polarizing and violent, and in the short term it brought about a sharp decline in agricultural production. The Mexican government distributed land to peasant villages in the form of *ejidos*, lands that were owned and worked communally by villagers. The ejidos were underfunded and deprived of the technical inputs that might have made them viable, and they were increasingly caught up in the corruption of Mexico's single-party state. Moreover, during its years of revolutionary reconstruction, Mexico continued to be plagued by violence, including several military uprisings and a major religious civil war (1926–1929). There was no shortage of Mexicans with reason to leave home.

Although the years immediately following the end of World War I were disastrous for the U.S. economy, the picture brightened by 1923. The flow of immigrants increased till, by the mid-1920s, there was strong sentiment in the United States in favor of curtailing it. Recent waves of migration from southern and eastern Europe conjured, in the popular mind, images of urban slums, poverty, radicalism, and disease, while hostility toward Asian immigrants was long-established. World War I saw a rise in nationalism and a tendency to view foreigners as enemies and a source of contagion. At the forefront of the movement to restrict immigration were individuals who maintained that the United States had been founded and developed by "Nordic" races. "Inferior races" were incapable of assimilating to American culture, and their admission would be fatal to the nation's democracy and institutions. Mexicans, in the restrictionists' view, were clearly inferior, the product of centuries of racial intermixing in which Indian and black blood predominated. Restrictionists denounced Mexicans as filthy, debauched, vicious, lazy, and stupid—"human swine," in the view of Vanderbilt University economics professor Roy Garis. (González, M. (1999) 146–147)

Organized labor also advocated curtailment of Mexican immigration, albeit for different reasons. The American Federation of Labor (AFL) claimed that there were plenty of domestic workers who would take the jobs done by Mexicans if a decent wage were offered; that Mexicans deprived American citizens of jobs and pushed down wages; and that Mexicans could be used as strikebreakers. The AFL tried in vain to have Mexican immigration legally restricted. AFL president, William Green, also tried to interest

Mexico's principal labor union in a cooperative effort to curb migration in the name of labor solidarity. Those efforts all proved fruitless. (Levenstein (1968))

Ironically, the restrictionists' greatest triumph—the National Origins Act of 1924—most likely increased the volume of immigration from Mexico. The Act imposed quotas on immigration from Asia and Europe, but not on immigration from the Western Hemisphere. Suddenly industrialists and farmers in the Midwest were deprived of the European immigrants, leaving many more jobs to be filled by Mexicans.

This was hardly the outcome the restrictionists were aiming for, but powerful interests fought hard against restricting Mexican immigration. Economic interests who stood to gain from the use of cheap Mexican labor were joined by prominent U.S. diplomats, who argued that restricting Mexican immigration would antagonize the Latin Americans with whom the United States carried on much trade. Offending the Latin Americans with discriminatory legislation could bring dire economic consequences.(Reisler (1976) 202–213) During the 1920s, the anti-restrictionists generally carried the day, despite some modest measures late in the decade to discourage migration from Mexico. It was left to the stock market crash of October 1929 to cause a serious curtailment of Mexican immigration.

The sudden rise in unemployment during the Great Depression led to a fresh round of nativism in the United States. Chambers of commerce, which during the 1920s had championed unrestricted immigration, now urged factories to fire their foreign workers first. Vigilantes threatened violence against any business that hired Mexicans in preference to Americans. In short order, perhaps half of all Mexican workers in the United States were unemployed and in dire straits. Those Mexicans fortunate enough to retain jobs saw their wages fall precipitously, landing them among the poorest of the poor in Depression America.

Many Mexican laborers, faced with starvation, turned to public relief agencies, further inflaming anti-immigrant sentiment. Cities, finding themselves overwhelmed by relief seekers, demanded action. The climate of hostility was such that many Mexicans simply fled across the border rather than await expulsion. Some municipalities undertook repatriation programs of their own. The largest was in Los Angeles County, which in 1931 began deporting one trainload of Mexicans per month. In the end, perhaps half a million people returned to Mexico in the early 1930s, either voluntarily or through forced deportation. Of course, Mexico's economy suffered the shocks of the Depression as well, so returning Mexicans found no relief in their native land. (Balderrama and Rodríguez (2006); Hoffman (1974))

The early 1930s witnessed efforts by Mexicans and Mexican Americans to improve their lot through direct action. Mexican berry pickers in California's San Gabriel Valley went on strike in the summer of 1933, while cotton pickers in the San Joaquin Valley launched a much larger strike—the largest agricultural strike in U.S. history—later that same year. Although these strikes brought few gains for the workers, they at least helped put to rest the enduring myth that Mexicans were docile and happy to endure any abuse. (González, G. (1999))

In the mid-1930s, the situation for Mexican immigrants declined still further with the mass influx of refugees from the Dust Bowl of the Great Plains. The refugees—more than 350,000 of them—were hungry, desperate, white, and willing to take any work no matter how hard or degrading. By 1936 they had virtually replaced Mexican workers in California's fields. It was not until World War II created new labor shortages that Mexican workers found themselves once again in demand.

The Bracero Era

Mexicans in the 1940s had ample incentive to go abroad for work. At that time, Mexico's production of basic food crops was among the lowest in the world. (Garcia, (1980) 4) Much of the nation's corn was grown on inferior and unirrigated land, which led to catastrophe between 1948 and 1953 when the north central plateau was hit with severe drought and flooding. The problems endured by these rural folk were partly the result of calculated government policy. In the early 1940s, Mexico's leaders opted for a strategy of concerted "modernization" that emphasized fomenting commercial agriculture in order to underwrite an ambitious program of state-directed industrialization. The state poured massive amounts of money into irrigation projects, almost all of them in the hot, arid northern border region, in the hope of benefiting from trade with the United States. During the 1940s, Mexico began experimenting with what came to be called the "Green Revolution." American and Mexican scientists worked in tandem to develop new, more productive seed strains, fertilizers, and chemicals to control insects and plant diseases. The Mexican government and private investors poured billions of pesos into research and infrastructure improvements. The results were, in some ways, spectacular, an increase in productivity that became part of what admiring observers dubbed the "Mexican Miracle." Between 1940 and 1960, Mexico's agricultural production increased at an average rate of 7.1 percent, among the highest in the world. (Cross and Sandos (1981) 16–34)

There were flaws in the development model. The "Green Revolution" brought most of its benefits to large, irrigated farms whose owners had ample access to capital, technology, and credit. Well-connected politicians and businessmen in the northern border region made fortunes in wheat, cotton and sorghum, while poorer farmers continued to grow corn and beans on poorer, rain-fed lands. Rural misery persisted. (Hicks (1967))

At the same time that Mexico's "miracle" was distributing its blessings so unequally, demand for cheap farm labor once again rose in the United States as a result of World War II. Conscription of young men and the movement of poor blacks and whites to war-related industries caused southwestern growers again to demand access to Mexican labor. The result was a second, more ambitious "bracero program." Originally intended as an emergency measure to help American farmers weather the wartime labor shortage, the program was extended till 1964 at the insistence of powerful interests in the United States. Some four and a half million Mexicans participated.

During the war years, Mexico found itself in a strong bargaining position, and it was able to impose a number of conditions. U.S. employers were obligated to pay round-trip transportation for their workers, provide adequate housing and medical care, guarantee a minimum number of workdays at the "prevailing wage" for a given region, and ensure that Mexicans would not become victims of discrimination, or be used either to displace American workers or to bring down wages. The Mexican government claimed the right to unilaterally blacklist any region it believed to be violating these conditions.

Growers worked hard to water-down these regulations, and they enjoyed much success, especially after World War II ended. Powerful farm interests quickly figured out that the "prevailing wage" could be whatever they decided to pay at the start of the season, and they kept that wage as low as possible since higher wages might attract domestic workers, which would disqualify them from using braceros. Employers also routinely failed to provide adequate housing and health care, but there were few repercussions owing to lax enforcement. Conditions for braceros tended to deteriorate after the war, as the Mexican government's bargaining power rapidly waned.

Remittances, some $70 million in 1952, from braceros, meanwhile, had emerged as an important source of income for Mexico.

The bracero program was plagued from the start by problems and tensions. Corruption was a serious issue for aspiring braceros. In order to become a bracero, one might have to bribe his village president, the military inspector, and the labor contractor. In all, most prospective braceros had to shell out fifty dollars in bribes—a substantial sum for poor Mexicans—and even then he was not guaranteed a contract. (García, (1980) 37) Since most aspiring braceros borrowed this money from loan sharks, expecting to repay those sums with their earnings in the United States, those who did not get contracts had a powerful incentive to cross the line illegally.

Other tensions quickly became salient issues in U.S.–Mexican relations. The United States disliked allowing Mexico to blacklist certain regions, while Mexico complained about the "prevailing wage" rates. Both Mexico and the United States expressed concern over the fast-growing problem of illegal migration, and each charged that the other was not doing enough to control it. The issue of Mexico's right to blacklist U.S. regions grew heated when Mexico, in June 1943, declared the state of Texas ineligible to receive braceros owing to its "extreme, intolerable racial discrimination." (Scruggs (1963)) Texas officials tried to redeem their states' reputation, but the ban remained in effect until March 1947. Two years later, when the terms of the program were renegotiated, Mexico lost its right to blacklist.

Ironically, although the bracero program was initially justified on the grounds of wartime shortages, the years from 1942 to 1946 accounted for only 4 to 6 percent of the total number of contracts issued during the program's life; 72 percent of the contracts were issued between 1955 and 1964. The reason for the continuation of the program was the considerable clout of the corporate farming bloc. Only the largest commercial farms used braceros; 98 percent of American farms did not. Despite their relatively small numbers, the employers of braceros had such clout that their requests that the program be extended routinely breezed through Congress. After World War II, when the United States had less need for Mexico's cooperation, Mexico lost its bargaining power and farm bloc interests increasingly called the shots. This was made poignantly clear in 1948 when the Mexican government tried to demand a higher wage for Texas cotton pickers. The United States, in response, threw open the border at El Paso, admitting thousands of hungry Mexicans. Although the United States quickly apologized for this episode, a similar scenario played out in 1954 when the terms of the bracero program came up for renegotiation. When the Mexicans tried to influence the terms of the program, the United States responded by recruiting workers unilaterally, without benefit of an agreement. The Mexican government abandoned its tough stance, and from that point onward influence over the program disappeared. (Hawley (1966))

Although the bracero program was a major turning point in the history of Mexican migration to the United States, it actually accounted for a small minority of the Mexican workers who came to the United States between 1942 and 1964. By 1947, the majority of "braceros" were actually illegal immigrants who had been "legalized." By the late 1940s, unauthorized entry of Mexicans into the United States had grown to such proportions that it was routinely described as a "flood" or "invasion. There were few penalties for illegal entry, and some potential rewards. A 1951 Presidential Commission on Migratory Labor charged that the policy of "legalizing" illegal migrants rewarded illegal behavior even while law-abiding Mexicans waited in vain for contracts. The bracero program, the commission found, worsened the problem of illegal migration by attracting workers to the border while

failing to provide contracts equal to the demand. "Our Government," the commissioners wrote, "thus has become a contributor to the growth of an illegal traffic which it has responsibility to prevent." (President's Commission (1951) 137)

In 1952 Congress tried to deal with the problems by passing a new Immigration and Naturalization Act that made it a felony to transport or "harbor" illegal immigrants. A proposed amendment that would have made it a felony to *employ* anyone suspected of entering the country illegally was defeated by a lopsided vote of 69–12. Texas senators insisted on the so-called "Texas Proviso," which said that employing illegal immigrants did not constitute "harboring." Many powerful business interests favored an open border; failing that, they favored measures that would calm increasingly aroused public opinion while doing little or nothing to stem the flow of illegal immigrants. Indeed, growers often urged braceros to tell their friends and relatives that jobs awaited any who came illegally. (Massey, et al. (2002) 36)

In 1953, U.S. Attorney General Herbert Brownell, responding to growing popular outcry, revealed plans for a mass deportation project known as "Operation Wetback." The architects of the operation took a decidedly military approach, using mobile task forces equipped with jeeps, trucks, cars, planes, and even a pair of ships. By the end of operation, officials claimed that 1,300,000 Mexicans either fled or were forcibly deported, though this figure is likely exaggerated. Immigration Commissioner Joseph Swing confidently proclaimed that "The so-called 'wetback' problem no longer exists … The border has been secured." (García (1980) 225) Operation Wetback was accompanied by some efforts to increase vigilance at the border and to improve the bracero program. Unfortunately, by this time braceros were little better off than their unauthorized counterparts, with few protections and such wretched conditions that one grower boasted, "We used to buy our slaves; now we rent them from the Government." (Garcia (1980) 230)

Operation Wetback curtailed illegal immigration for a few years, but Commissioner Swing's boast that the problem had been solved was overly optimistic. By the mid-1960s, illegal migration was again on the rise. In the early 1960s, with John F. Kennedy in the White House and a liberal–labor coalition dominant in the U.S. Congress, the bracero program came under increased fire, and it was quietly ended in late 1964.

1964–1986

The end of the bracero program caused the Mexican government some concern, since bracero remittances were important to Mexico's economy and, more crucially, the program had acted as a "safety valve" to drain off some of Mexico's surplus workers. In hope of meeting the demand for new jobs, the Mexican government authorized the creation of a Border Industrialization Program. Corporations, mostly from the United States, were invited to build plants, known as "*maquiladoras*," just south of the border to assemble various products using imported materials. The products were then re-exported to the United States duty-free. The program obliged Mexico to alter its laws forbidding wholly owned foreign subsidiaries to set up shop near the border, and it was, in some ways, a first step toward a profound shift in Mexico's economic development model—one that made the country increasingly dependent on foreign, mostly U.S., capital. By 1976, 476 maquiladoras were operating in Mexico. However, they did not provide much employment for ex-braceros, since the maquiladoras hired mostly women.

During the late 1960s and early 1970s, apprehensions of deportable immigrants in the United States rose at a rate of 25 percent per year, largely owing to a gathering economic crisis in Mexico. Although between 1940 and 1970 Mexico's economy grew

in ways that tended to increase social inequality, the economy *did* in fact grow at the impressive rate of 6 percent per year, but economic growth ground to a halt during the 1970s. Mexico continued to pursue an expensive strategy of government-directed industrialization using import tariffs, subsidies, and tax breaks together with a tremendous buildup of the public sector. The country's foreign debt expanded astronomically, but leaders saw no reason to rein in spending because new oil deposits were found in southern Mexico at a time when oil prices were high. When oil prices crashed in the early 1980s, debts came due with a vengeance. The government was obliged to devalue the peso in February 1982, and from that point onward it seemed as though the nation lurched from crisis to crisis. During the 1980s, the percentage of Mexican families living in poverty grew from 45 to 60 percent. (Massey, et al. (2002) 77) With little bargaining power vis-à-vis international banks, Mexico was forced to open its economy to foreign penetration, selling off government assets, abandoning protective tariffs, ending subsidies, and, in short, embracing the new, "neoliberal" economic model.

These changes coincided with the first imposition of numerical restrictions on migration to the United States from Latin America. The Immigration and Nationality Act of 1965 abandoned the racist system of preferring some nationalities to others, substituting set numbers of visas for the world's various regions. Immigration from the Western Hemisphere was limited to 120,000. In 1976, a per-country limit of 20,000 was established, a limit that remains in force. Considering that, since 1955, Mexico had annually sent more than 40,000 legal migrants, plus an additional million undocumented migrants, to the United States, the supply of visas was clearly unequal to the demand. Yet, demand for Mexican labor remained high in the United States. It was a recipe for an explosion in illegal migration.

During the 1970s, the issue of illegal immigration from Mexico once again became heated in the United States. Americans leveled a litany of charges that would become familiar: "illegal aliens" brought down wages, took jobs from American citizens, paid no taxes while taking disproportionate advantage of social services, and refused to learn English or assimilate to American culture. Many politicians and media figures eagerly fanned the flames by scapegoating undocumented migrants for a host of social and economic problems. President Gerald Ford accused undocumented migrants of "interfering with our economic prosperity," while Ford's director at the Central Intelligence Agency warned that by the end of the twentieth century the Border Patrol "will not have enough bullets to stop them." (Nevins (2002) 63)

The Immigration Reform and Control Act (IRCA) of 1986 was the eventual product of growing concern with the illegal immigration issues. IRCA featured large increases in funding for the Border Patrol, as well as an "amnesty" program that offered immigrants who had resided in the United States continuously since January 1, 1982, a chance to legalize their status. It also legalized certain categories of farm workers. IRCA finally did away with the famous "Texas Proviso," imposing stiff penalties on employers who knowingly hired undocumented workers. The most immediate impact of the legislation was to suddenly legalize some 3 million immigrants, 2.3 million of whom were Mexican. By the early 1990s it had become apparent that the legislation was doing nothing to slow, let alone halt, illegal migration.

NAFTA and Nativism

The United States economy went into recession in the early 1990s, and undocumented workers once again made convenient scapegoats. Politicians and pundits fretted about a border out of control and a society under siege. One of the most conspicuous results of

this rising nativism was California's Proposition 187 of 1994. Proposition 187 enjoined immigration officers to redouble their efforts. More importantly, it sought to deny undocumented immigrants all public benefits, exempting only emergency medical care and *including* public education. Nearly 59 percent of California voters endorsed the measure, which was later declared unconstitutional. The provisions of Prop 187 did not die away. President Bill Clinton's "welfare reform" bill of 1996 incorporated the provisions of Prop 187, barring undocumented immigrants from receiving most federal, state, and local public benefits. (Jacobsen (2008); Massey, et al. (2002) 95–96)

The other salient trend since 1990 has been a progressive militarization of the border. The Border Patrol had been a perennially underfunded and inefficient agency, but from 1986 to 1998 its budget increased eight-fold and it acquired six times as many officers. There were also moves toward building walls and fences and using high tech detection equipment. The most ambitious such effort, dubbed "Operation Gatekeeper," went into effect in 1994 at the San Diego border. It involved high intensity floodlights, an eight-foot high steel fence, motion detectors, infrared scopes, and trip wires. Gatekeeper succeeded in decreasing the volume of crossings at a small stretch of the U.S.–Mexico border, and other similar operations soon followed. (Nevins (2002))

What ultimately doomed such measures to failure was the fact that they took place during a period of rapid economic integration between Mexico and the United States. In 1994, trends that had been under way since the early 1980s culminated in the signing of the North American Free Trade Agreement (NAFTA). By 1997, the value of Mexico's trade had increased five fold, an average of 220,000 vehicles crossed the border each day, and some 208 million persons crossed the border at legal checkpoints each year, double the 1986 level. (Massey, et al. (2002) 99) Policing such a busy border promised to be a daunting task indeed.

Politicians in both the United States and Mexico promised that NAFTA would create new jobs on both sides of the border, reducing the incentives of Mexicans to migrate northward. (Papademetriou (2003) 43) But NAFTA was profoundly flawed. It included no mutual understanding with regard to how migration should operate in the post-NAFTA world, leaving the United States free to pursue its agenda of border militarization, punitive measures, guest-worker programs, and hints at future "amnesty." Moreover, its chief architects never conceived of NAFTA as any sort of development program for Mexico. Mexico was cast in the role of perennial junior partner to its richer cosignatories, its chief contribution being cheap labor. Unlike the European Union, which anticipated problems in integrating severely asymmetrical economies, NAFTA contained no provisions for trying to elevate Mexico to a more equal status with Canada and the United States, and its architects were unwilling even to consider the issue of labor mobility. (Casteñeda (2004)) One of the most notable results is that NAFTA has not only fallen far short of its promise, but in fact misery has increased in Mexico during the NAFTA era. The number of Mexicans living below the poverty line went from 23.6 million to 47 million between 1992 and 2000. (Cypher (2001) 32) Not only are more people living in poverty, but the gap in wealth between rich and poor, and between Mexico's relatively developed north and its impoverished south, have increased during the NAFTA years.

Other factors contributed to a dramatic upsurge in migration rates from Mexico. In 1995 the peso crashed, plunging Mexico into a deep depression that was eased somewhat in the late 1990s with the help of a 50 billion dollar loan from the United States and a revival of trade sparked by robust economic growth in the United States. Meanwhile, U.S. agribusiness has "dumped" large quantities of government subsidized U.S. corn in

Mexico, displacing many of the poorest and most vulnerable farmers. Despite an increase in the export of fruits and vegetables, Mexico has run a consistent trade deficit in agriculture, and its rural sector has languished. Drug-related violence in some parts of Mexico has also provided many Mexicans with an incentive to flee their country.

In several ways, IRCA and stepped-up border enforcement are also to blame for the increase in illegal immigration. The newly legalized immigrants, feeling more secure, invited friends and family to join them. While IRCA made it a crime to employ undocumented workers, employers were under no obligation to verify the authenticity of the documents they inspected. A boom in the production and sale of bogus documents was the predictable result. Meanwhile, the INS abandoned "internal enforcement" almost entirely. In 1999, the agency devoted a mere 2 percent of its budget to enforcing sanctions against employers of undocumented workers, preferring to focus its most intense efforts on the border.

Even at the border, although apprehensions of undocumented migrants rose from 1994 to 2001, an undocumented migrant's chances of successfully crossing the border have improved, and are estimated at between 92 and 97 percent. (Nevins and Dunn (2008); Massey, et al. (2002) 109) This is partly because more border crossers use professional people-smugglers (commonly known as *coyotes*), and partly because more people cross in remote, less-patrolled sections of the border. The increased border enforcement has made border crossing far more dangerous and costly. Deaths from heat, starvation, exposure, drowning, and suffocation have risen steadily since the mid-1990s. A record 460 deaths were recorded in 2005 alone. (Marosi (2005); Cornelius (2001)) The toughened border enforcement, together with IRCA's legalization provisions, compelled more Mexican immigrants to settle permanently in the United States, since the difficulties of re-entry made it risky to return home. Selective border enforcement has tended to channel immigrants away from the traditional destinations—California, Texas, and Illinois—toward new destinations in the Midwest, Northeast, or Southeast, transforming what was a regional phenomenon into a national one. (Zúñiga and Hernández-León (2006) The 2000 census revealed that Hispanics have replaced African Americans as the United States' largest minority, a development that owes much to immigration policies implemented since 1986.

The terrorist attacks of September 11, 2001 accelerated some of the more baleful trends that had been under way since the mid-1980s. In particular, there was a new tendency to conflate illegal immigration with the "war on terror," and to intensify the militarization of the border. In March 2003, the Immigration and Naturalization Service was dissolved and its enforcement duties were taken up by Immigration and Customs Enforcement (ICE), a component of the Department of Homeland Security (DHS). ICE received a lavish budget of $5 billion and soon boasted some 16,500 employees. In the fall of 2006, ICE began a series of controversial high-profile raids on businesses and homes ostensibly seeking to arrest perpetrators of identity theft. These raids employed massive military-style force that seemed principally designed to terrorize immigrant workers, for the raids uncovered few cases of actual identity theft. Most of the immigrants seized in the raids were charged with the lesser crime of possessing a false social security number and jailed pending deportation. Undocumented immigrants have become the fastest growing element in the U.S. prison system. (Lovato (2008); National Commission on ICE Misconduct (n.d.))

The September 11 attacks also led to a renewed enthusiasm for erecting physical barriers against immigration and a nativist movement of unprecedented vehemence. The

Secure Fence Act of October 2006 mandated some 850 miles of "reinforced fencing" of at least two layers at designated points on the border. The project faces daunting challenges in the rugged topography of the border, making the barricade option extremely expensive. The environmental costs may be high as well, for at least some of the planned fencing promises to destroy sensitive wildlife habitats. (Innes (2006); Nevins and Dunn (2008)) At the border, quasi-vigilante groups with varying proclivities toward anti-immigrant violence have appeared, most notably the Minute Man Project. The Southern Poverty Law Center estimates a 40 percent rise in the number of extremist nativist groups since 2000. (Doty (2009) 8; Jacobson (2008))

In the history of Mexican migration to the United States, only economic fluctuations have proved to have a serious impact on migration rates. The economic downturn in the United States in 2008 led to a 25 percent drop in the rate of illegal migration. (Preston (2009)) Many powerful interests have sought to ensure that an ample supply of Mexican immigrants is available whenever needed, even while denying those immigrants civil rights. The high profile efforts by the U.S. government to "control" immigration have been, to a large extent, political theater, measures that could be relied upon to have little real impact while reassuring the voting public that something is being done.

At present there are thought to be some 12 million undocumented immigrants living and working in the United States. Immigration has become a way of life that is institutionalized on both sides of the border—so much so that it is commonly maintained that Mexico is a transnational community. In 2006, this notion was reinforced when Mexicans living abroad were granted the right to vote in Mexican presidential elections. (Santamaria Gomez and Zackrison (2003); Herrera (2006)) Most of the immigration reform efforts currently being discussed in the United States have been tried before and failed, so the matter seems likely to continue for many years to come.

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Sex, Death and Structuralism: Alternative Views of the Twentieth Century

PAUL GILLINGHAM

At the twentieth century's end about as many Mexicans lived in the United States as had in all of Mexico a hundred years earlier.[1] In 1900 there were 13.6 million people in Mexico, three-quarters of whom lived in the countryside. By 2000 there were 100 million people, three-quarters of whom lived in towns and cities.[2] Few comparable countries have experienced a population boom on this scale: Mexico's population rose 702 percent across the period. China, by contrast, only experienced a 246 percent increase in population across her demographic transition.[3] That growth came, moreover, despite the costs of the revolution: an estimated 2.1 million missing people.[4] In eighty years Mexico changed from a relatively small, rural, parochial society with high birth and death rates to a relatively large, urban, transnational society with low birth and death rates. This demographic transition is the greatest single change in modern Mexican history, outstripping any political, economic or cultural shift in its impact on society and environment.[5] Finally, few societies have managed to rein in population growth so rapidly.[6] By 2005 Mexico's population seemed to be nearing stasis.[7] The combination of demographic disaster, dramatic population boom and abrupt fertility decline constitutes a peculiar story.[8]

The basic, positivist reality of demographics has been underemphasized in charting the course of modern Mexican history. This may be because demographers like disaster. There have been vigorous debates over the scale and consequences of dying during the conquest of the Americas, or the eighteenth century in China, or the Terror in 1930s Russia.[9] By contrast in Mexico, as Robert McCaa notes, even the slaughter of the revolution has met with a mixture of scholarly silence and disbelief.[10] There may be theoretical reasons: an interest in the causal power of demographics may seem overly structuralist for scholars of the cultural turn. Yet structuralism might come back to haunt current historians: like hemlines, faith in agency seems to drop as economies fall.[11] Questions of structuralism lie at the heart of this analysis, for while a population boom drives vast

shifts in the basic structures of life, the causes of that boom can be explained in terms of both structure and agency. Both PRIístas and population experts saw considerable agency in the demographic transition, interpreting this growth and subsequent stabilization as the desirable outcomes of effective (and enlightened) state policy.[12] This chapter sketches this exceptional demographic transition, surveys its impacts, and tries to weigh the balance of structure and agency in its genesis.

The early twentieth century in Mexico was the scene not of political success, but rather of marked failure. That failure sparked a revolution that quite literally decimated the population. Demographers agree that the Porfiriato (1876–1911) saw the beginnings of growth, which was reversed by the losses of the 1910s. Not all of those losses were through death: an estimated 350,000 people migrated, overwhelmingly to the boom states of California and Texas. Another 600,000 never existed, their births "lost" in the disruption of war. Yet the majority of the missing, some 1.4 million people, died. Fighting, famine and epidemic killed young men in particular; were especially prevalent during the peak years of the wars against Huerta (1913–1914) and between the revolutionaries (1914–1916); and were strongly focused on the main combat zones of the centre-north and Morelos. In a third of the states less than half the males alive in 1910 survived to be counted in 1930. Death, though, was not all that was gendered: in 1914, at the peak of the violence, female life expectancy at birth was 17 years.[13] In 1916 typhus killed about a third of the population of Guanajuato.[14] In the Nahua village of Acoxtla del Monte, Tlaxcala, the 1917 corn harvest failed and famine halved the population.[15] Disease and hunger spread outside the main conflict zones, affecting soldiers as well as the civilians whose animals they stole and whose grain stores they sacked. The Zapatistas who invaded northern Guerrero "arrived almost naked, thin from the lack of food. They opened the stomach of one of them who had died in Mexicapán and found nothing more than a few pieces of cactus."[16] When fighting ended, Spanish influenza began. In Morelos the pandemic left whole villages of corpses, the survivors fleeing south; in the city of Zacatecas bodies were stacked up like logs.[17] The sum of mortality, unique in modern Latin America, made the revolution one of the bloodiest wars in history. Mexico's absolute losses were comparable to those of Germany in the First World War, and relative to population they were substantially greater.[18] The revolution was, McCaa concludes, the Americas' "greatest demographic disaster" since the conquest.[19]

The mass death of the revolution was the first demographic peculiarity; the explosive population growth that ensued was the second. The population had for centuries grown very slowly, because, as Frank Tannenbaum observed, "Mexico is a hard … country within which to nurture the human body, and it is only with the greatest difficulty that even a sparse living may be won from its smiling but recalcitrant earth."[20] Beyond the difficulties of nutrition, disease reliably checked growth, particularly in the lowlands. Thus San Andrés Tuxtla, a market town in low hills in southern Veracruz, was hit by cholera in 1833, smallpox in 1889, cholera once more in 1916, and the Spanish influenza in 1920. Many of these were pandemics—in 1833 the cholera bacillus travelled steadily along the arteries of global trade, moving from Bengal via England—but their local impact could be particularly brutal. Within a month of the cholera's arrival in San Andrés some 200 a day were dying; an entire barrio, San Francisco, was wiped out; about 40 percent of the townspeople reportedly died.[21] (In London, by contrast, only 7,000 died, less than half a percent of the city's population.)[22] The highlands were healthier, but still subject to malaria, tuberculosis and epidemic clusters. The comparatively well-fed ranchers of San José de Gracia, Jalisco, lost 14 people to the Spanish influenza of
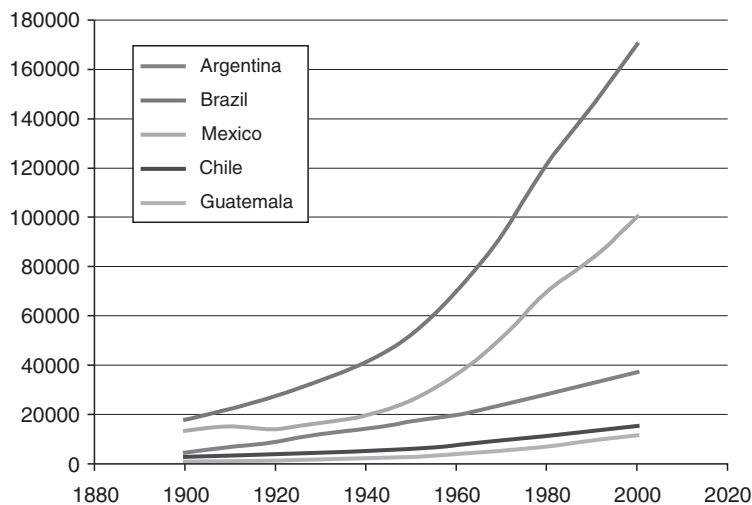
Figure 37.1   Latin American population growth in the twentieth century. Data from Oxford Latin American Economic History Database (OXLAD).

1919, and several more to secondary outbreaks of smallpox and whooping cough.[23] Demographic shifts are complex phenomena, and in reconstructing them, as André Burguière observes, "fertility-rates, birth frequencies, marriage ages and death-rates must be combined to produce a model, a simulation of behaviour. These combinations are variable; they yield not one but several models, and leave us to contemplate an ambiguous cultural reality".[24] The essence of Mexico's population boom is clear enough, though: mortality plummeted after 1920, while fertility remained high and constant for nearly sixty years. The result was the classic S-shaped population curve of a typical—if dramatic—demographic transition.

   The population did not just grow: it was radically redistributed by violence, opportunity and hardship. The armed revolution laid waste to the states of Morelos, San Luis Potosí, Durango and Chihuahua in particular, where set-piece battles gave way to prolonged guerrilla warfare. It simultaneously pushed people toward new zones of refuge: the population of Veracruz actually rose across the 1910s. Above all, people abandoned the dangerous, hungry countryside for the cities. Refugees swelled the populations of Aguascalientes by 6 percent, Guadalajara by 20 percent and Durango by 23 percent. They catalysed rapid growth in the valley of Mexico, where the Distrito Federal's population rose by nearly a third.[25] It was the beginnings of an extraordinary concentration of humanity in the capital.

   Over the rest of the century two less dramatic, long-term redistributive trends became clear. Mexicans moved steadily northwards, to jobs in tourism in frontier cities, in export agriculture in the newly irrigated fields of Baja California, Sonora, Sinaloa and Tamaulipas and, later, in industry in the *maquiladoras*. They also moved steadily downhill, particularly as the mid-century road-building boom connected once-remote places to national markets; lowland regions which moreover were safer as tropical diseases retreated.[26] These were big processes. Yet they were secondary compared to the main social change of the century, which was the flight from the countryside.
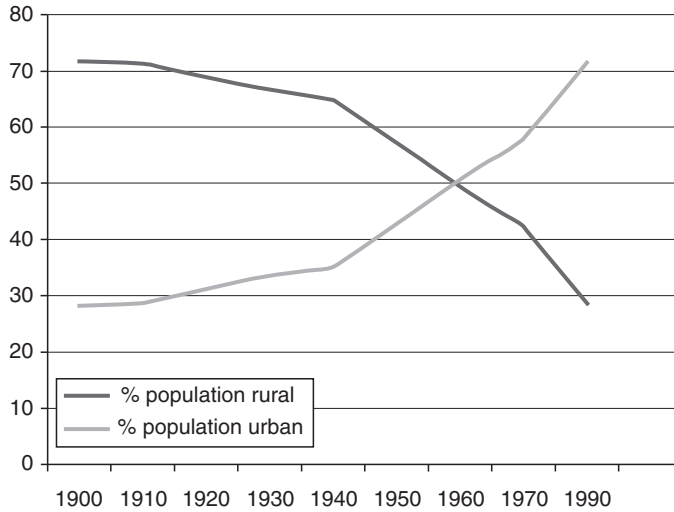
Figure 37.2 Mexican population distribution, urban vs rural settlement. Data from INEGI Estadísticas Históricas de México CD-ROM.

This exodus took two forms: urbanization and migration to the United States. The urban growth of the 1910s was never reversed; it continued and accelerated between 1940 and 1960. The latter's census-takers counted, for the first time, more Mexicans in urban than in rural settings. In 1900 only 33 places held more than 15,000 inhabitants; by 1995 there were 453 towns and cities that big. Some of these—Mexicali, Cancún, Ciudad Juárez—were new cities, created by new industries. Others were newly important: the population of Monterrey, the industrial giant of the north, grew 4,000 percent across the century, forming—along with Guadalajara, Tampico and Torreón—one of four new metropolitan zones.[27] But urbanization was above all centred on the Valley of Mexico. The capital was home to 344,000 people in 1900; in 2000 the Distrito Federal (DF) housed 8.6 million, and its boundaries had largely merged into the Estado de México, forming a conurbation of over 20 million people.[28]

For much of the first half of the century many urban Mexicans followed livelihoods that were not that urban at all. In 1922 about 80 percent of the population of Iguala, the closest thing Guerrero had to a modern city, worked in agriculture.[29] In the provinces even the relatively few professionals tended, like their neighbours, to farm plots in the town hinterlands.[30] The quality of urban life changed profoundly after 1940, as the nation industrialized and the towns and cities boomed. Between 1940 and 1950 the population of Oaxaca, for example, rose by 60 percent.[31] In the second half of the century urban Mexicans overwhelmingly worked for wages (both formal and informal) in shops, restaurants, factories, bureaucracies, markets or on the streets. They bought food; they followed mechanical time (over half the tenement dwellers studied by Oscar Lewis had wristwatches); they commuted to workplaces in buses, *combis*, or on the metro; when they got sick they increasingly sought out doctors.[32] By the end of the century the rich and the poor in the cities, even across the enormous gap in wealth that separated them—and the spatial apartheid this created—probably had more in common with each other than with their rural ancestors.

The social revolution of city life was in part founded on opportunity, both real and perceived. Mexicans were readier to move in search of better lives than before, and the towns and cities drew them in with a range of positive incentives. City life offered wage labour, cheap consumer goods, and better chances of healthcare and education for children. On a less noble note, it offered the seedy glamour of 1940s or 1990s nightlife—the dancers who enchanted Abel Quezada, the E-fuelled abandonment of the Pervert Lounge—the diversions of wrestling, or the *teatro de carpa,* or the cinema, or the cheap seats in *sol general* at the bullfight. All classes and groups were drawn in: for aspiring politicians a golden rule was to get to DF as quickly as possible.[33] Political, administrative and above all economic centralization drove the race to Mexico City. Tax breaks, infrastructure development, government subsidies and artificially low food prices were all used to concentrate industries there: by 1970 half the country's industrial workers were based in the central valley, and buses brought commuting workers in from neighbouring regions like the Tlaxcala highlands.[34] Industrial and administrative workers generated demand in other sectors, like construction, bringing in yet more migrants. They also formed bridgeheads for rural kinship networks, helping other family members to follow in their footsteps. Migration to the capital was consistently led by women, often working as domestic servants—classic agents of modernization for the countryside—who in turn brought families in their wake.[35]

The city remained a chimera for many.[36] Government officials reported consistently low unemployment statistics, but they were unreliable, and a consistently large informal sector belied the promise of leaving poverty for many. Country people might move to the city dreaming of well-paid jobs; they ran a reasonable risk of ending up as the cannon fodder of urbanization, eking out marginal and unstable lives as street hawkers, rubbish pickers, pickpockets or prostitutes. Life in the tenements of la Doctores, or in the shantytowns which came to ring DF at the same time as the Periférico, could be nasty and brutish.[37] It was not, however, all that short. National life expectancy rose steeply during the peak period of urbanization, climbing from 37 to 59 years between 1930 and 1960, and the benefits of better access to clinics and hospitals in the cities seem to have cancelled out the stresses of unsanitary overcrowding; death rates were much the same for peasants and proletarians. Educational opportunities were clearly far greater: in the Sánchez family's tenement of the Casa Grande, Tepito, the average child spent nearly 5 years in school in the mid-1950s, and the children always had *historietas* to practise reading. By contrast in rural Veracruz, where Jesús Sánchez grew up, only 2 percent of children completed 4 years of school in the 1940s; and Veracruz was the leading provider of provincial education. Consumer goods, finally, were widely available, and Oscar Lewis's tenement dwellers overwhelmingly owned radios, while over a fifth had televisions.[38] Access to all these benefits required some initiative, lampooned in the 1949 film *Puerta, Joven* (in which Cantinflas serenades a doctor to arrange an operation for the crippled Silvia Pinal, pays her clinic fees by winning a horse race and finally saves the barrio school by out-blustering a bureaucrat.)[39] Yet migration and early urban life, it should be remembered, tends to self-select those with initiative.

As for unionized labour, while real wages declined steadily from the 1940s onwards, acquiescence was bought with notable benefits in cheap credit for housing, in privileged access to the doctors of the Instituto Mexicano de Seguridad Social (IMSS) and to education at all levels.[40] Bureaucrats, railwaymen and refinery workers all enjoyed their own hospital systems; textile workers in Ciudad Mendoza, Veracruz, enjoyed a flagship union secondary school that—at a cost of half a million pesos—provided their children with

workshops, a theatre seating 2,000 people and a 25 metre swimming pool.[41] Even the shantytowns were, until the 1980s at least, collectively upwardly mobile, as local party bosses delivered stuttering gentrification in the form of sewage systems, running water, electricity and paved roads. Politicians had little choice in this. The sprawling urban populations became the strategic high ground of national control in the post-revolutionary state and—between 1940 and 1970 at least—they were willing to collectively protest collective mistreatment.[42]

Yet Mexicans were not just drawn to the cities; they were pushed out of the countryside. Population growth was not matched by continuing supplies of land and credit; the agrarian reform was cut back after 1940 amid accusations of congenital low productivity.[43] Agriculture's role in the second half of the century was to supply export crops to the north and cheap food to the cities, permitting in turn the low urban wages that made industrialization possible. The government supported agribusiness through massive irrigation projects, such as the Balsas or Papaloapan dam systems, and through credit. They undermined *ejidatarios* and smallholders, meanwhile, with price controls on corn and beans.[44] Corn prices did not rise across the 1940s or early 1950s, and they dropped by a third between 1957 and 1973.[45] Industrialization and urbanization presupposed, consequently, a massive and systematic transfer of resources from country to city after 1940. People followed, driven by rural poverty, unemployment and even hunger.

The idea that rural populations were consistently cash-poor but well-fed as a result of agrarian reform—and consequently healthier than their urban counterparts—is difficult to prove. Rockefeller Foundation nutritionists studying villagers in central Mexico in the early 1940s were surprised by the unexpectedly good diets of even the poorest. This was attributed to the high amounts of iron, thiamine, carotene and above all protein in traditional foods such as corn, beans and dried fish. Even the cactus alcohol *pulque*, long-demonized as the scourge of progress, turned out to contain concentrated doses of minerals and vitamin C. Meanwhile Mexican researchers in the capital's Hospital Inglés charted widespread infant malnutrition. Yet the datasets were not comparable: the rural studies did not include many children, and records of death through malnutrition in both environments are unreliable.[46] It is evident that rural subsistence crises did not disappear. In 1947, for example, hunger drove villagers in northern Guerrero to harvest corn early, while local authorities struggled hard to enforce bans on corn exports given the "severe crisis of that cereal's shortage".[47] Mexican cities, on the other hand, were not as lethal as the early modern towns studied by Pierre Chaunu and others, "abattoirs" for an excess rural population, or the "dark satanic mills" of the first countries to industrialize.[48] Comparisons of death rates in some of the poorest rural regions (the main sources of migration) with those in the main urban zones show very little difference.[49] The only urban zone with consistently higher mortality was the Estado de México, and the comparison may be flawed: statistics from the deep countryside tend to the deeply unreliable, and *chiapaneco* civil registry records may well be less complete than those of the cities.[50] Mexico City closely followed the national average, and during the peak years of urbanization was actually safer than Zacatecas, Oaxaca or Hidalgo; Nuevo León was a far healthier place than any of the more rural states that people abandoned in large numbers.

The spike in land grants under President Echeverría was a last effort to correct some of the marked rural/urban imbalances; it did not work particularly well, and was followed by the official end of the land reform programme and the North American Free Trade Agreement. The competition that small producers in the countryside faced from

	Chiapas	Hidalgo	Michoacán	Oaxaca	Zacatecas	DF	Estado de México	Nuevo León	Average
1930	21	31	27	28	28	28	33	20	27
1940	18	23	22	31	24	24	27	17	23
1950	14	21	15	21	17	16	23	12	16
1960	12	14	10	16	11	10	15	8	12
1970	11	12	9	14	10	10	10	7	10
1980	6	8	7	10	6	6	6	5	6
1990	5	5	5	7	5	5	5	4	5

Figure 37.3   Death rates in the main sources and targets of internal migration. Data from INEGI, Estadísticas Históricas de México CD-ROM.

subsidized US corn producers after 1994 further pressured the rural sector. It is difficult to overstate the impacts of these imbalances across the second half of the century. Peasant household income, judged the anthropologist Arturo Warman, was statistically "not merely insufficient but ridiculous."[51] The World Bank assessed Mexico's Gini coefficient, which quantifies the equity with which national wealth is distributed, at an average of 56 between 1950 and 1968. In comparison, Argentina, Chile, Costa Rica and Guatemala all had Gini coefficients of between five and ten points lower. Across Latin America only Brazil had less favorable income distribution during the period in question. Extra-regional comparatives including Bangladesh, Egypt, India, Taiwan, Sri Lanka and Sudan all experienced significantly more equitable economies. The only region with similarly high Gini coefficients in the mid-century was Sub-Saharan Africa.[52] This extreme inequity in the distribution of national wealth was largely rooted in the poverty of Mexico's remaining rural population, subject since 1940 to a history of managed and foreseen decline.[53]

The other solution to inequity and rural poverty was migration. The development and displacement of the Porfiriato started a tradition of highly specific internal migration. Country people, many newly landless or fighting to hang on to small family farms, travelled to earn wages in the new industries and agribusinesses. Poor, often indigenous smallholders and peons went from the Huasteca and the Mixteca to the oilfields of the Gulf; from northern Michoacán to the tomato fields of Jalisco or Colima, or to the sugar plantations of the *tierra caliente*; from the highlands of Chiapas to the coffee farms of the Soconusco; from all over the Republic to the textile mills of Veracruz or Puebla.[54] In the twentieth century the pattern continued, but with far more migrants going far further to

far more places, many of them north of the border. The shocks of recession and revolution jump-started the flow of the desperate and the hopeful.[55] Between 1920 and 1940 migration remained low. Potential migrants were put off by discrimination, depression and the campaigns of discouragement from the government; the lure of land grants may also have anchored the poor to the countryside, even amid high levels of violence. During World War II, however, living conditions in the countryside worsened, while in the US men went to war leaving arms manufacturers, food producers and railways understaffed.[56] To resolve the labour shortage the US began recruiting workers in Mexico under the *bracero* program, a state-run system that granted annual Alien Laborer's Permits to Mexicans to work as fieldhands and railwaymen. It lasted from 1942 to 1964 and brought 4.6 million people north. In doing so, the program gave many families the skills and incentives for the next half century's dense migration, creating a culture of transnational labour that endured.

Being a *bracero* was tough from the start. Migrants who turned up at the recruitment centres in the main cities often slept in the parks and streets while they endured long waits for contracts and demands for bribes.[57] Workers who got jobs went by train to the border, where they were made to strip, were examined and sprayed with DDT for lice before being transported by ranchers to the work camps, where ten-hour a day, six-day weeks were the norm and pay was suspended when rain stopped work. Such conditions made the programme politically unpopular, a "source of shame" for some. Nevertheless the program was massively over-subscribed. The permits were a coveted resource that the government allotted on a quota basis to state governments, who in turn distributed them by lottery. Village mayors sometimes subverted the system, selling the permits or giving them to clients.[58] Many would-be migrants consequently turned to illegal migration. The undocumented could face even worse conditions, enforced by the fear of the law, and government circulars told village politicians to warn their constituents of the "grave consequences" and "serious dangers" of work that could approximate bonded labour.[59] Yet drastic warnings did little to stop the flow north. Some were driven by ambition. The first transnational workers from Santa Ana del Valle, a Zapotec community in the foothills of the Sierra Madre de Oaxaca, left in the 1950s and returned, relatively rich, to set up businesses and climb the political ladder.[60] Others were driven by desperation, "souls in anguish…all dirty, in rags, and starving…so weak that the strong Mexicali sun made them walk like drunkards".[61] It was not coincidental that wages in the "emigrant heartland" of Guanajuato, Jalisco, Michoacán and Zacatecas were all lower than the national average.[62]

Most US employment, however exploitative, was preferable to life in a collapsing rural community, and the collective contract *braceros* entered into with the US government held protective clauses regarding wages and working conditions.[63] The *braceros* Manuel Sánchez met in the tomato fields of Southern California "all agreed on one thing, that the United States was 'a toda madre'".[64] Hence the number of migrants rose steadily, and leapt upwards in the "lost decade" of the 1980s. By the end of the 1980s a majority of households in Santa Ana had at least one migrant; half the municipio of Ixcateopan, Guerrero, was in the United States.[65] Villagers tended to head together for the same places: *santaneros* to Santa Monica, *ixcateopenses* to Chicago, Zapotecs to Los Angeles, in large enough numbers to found a league for their own idiosyncratic brand of basketball.[66] The locations of receiving communities changed dramatically in the last decade of the century. Mexicans had traditionally headed to California, Texas, and the large cities of the Northeast; in the 1990s they broadened their range and increasingly moved to the

South. North Carolina's Latino population grew nearly 400 percent across the 1990s; Georgia's 1,000 percent between 1990 and 2005.[67] By 2000 conservative estimates put the sum of permanent and seasonal migrants in the US at nearly 12 million Mexicans.

Migration was lucrative for Mexico. Remittances became the second largest source of dollars for the country, and they multiplied once invested at home: each dollar a migrant brought in at century's end produced nearly $3 in Gross Domestic Product.[68] The majority of *braceros*, moreover, did return home, and regions such as Jalisco—which received a disproportionate number of *bracero* permits—experienced a corresponding jump in development.[69] Yet the numbers braving *coyotes*, the desert and the distinct instability of life as an undocumented worker also expressed the strains of population growth. Mexican governments promoted this growth until the 1970s; at which point the average mother gave birth to 7 children, the population was rising at around 3.5 percent a year—one of the highest rates in the world—and the economy was no longer expanding at the gallop of the "Mexican miracle". Faced with this combination, the state abruptly changed policy. In 1974 President Echeverría passed the General Law on Population, establishing fertility targets and the free family planning and contraceptives to achieve them. The government founded a National Population Council (CONAPO), housed in the powerhouse of the Secretaría de Gobernación. In 1975 Mexico City hosted the first major international women's conference, the International Women's Year tribune, where population control became a contentious issue; in 1977 and 1985 the capital was the scene of international meetings to discuss world population growth.[70]

Unlike most of the policies of the 1970s and early 1980s, Mexico's population planning turned out to be highly successful. Family planning services were offered to all Mexicans in the urban and rural health clinics that proliferated in the period. Intensive publicity campaigns used posters, television ads and radio spots to identify the use of contraception with social mobility and patriotism. *Telenovelas* were pressed into service, starting with the 1977 *Acompáñame*, in which Silvia Derbez pushed family planning as a normative good in "a morality play in prime time".[71] By the 1970s, one social historian noted, "just like the French, certain methods of birth control, once used only in the brothel, [were] now also in the conjugal bedroom".[72] There was a certain justice to this: it was a Mexican chemist, Luis Ernesto Miramontes, who first synthesized the hormone on which the Pill was based.[73] Women took to contraception even in rural, socially conservative Catholic towns like San José de Gracia, where the Pill became commonplace.[74] (Indigenous populations were the main exception to this pattern, booming in the 1980s and 1990s.)[75] This was the third particular feature of Mexican demography in the twentieth century. Once population growth was conceptualized as a problem—admittedly by regional governments, technocrats and intellectuals well before presidents— it was countered faster and more effectively than in most comparable countries.[76] This was recognized by the United Nations, which awarded Mexico a "population prize" in 1986 for its extraordinarily rapid reduction of population growth.[77]

Mexico's demographic history over the twentieth century, in summary, had three peculiarities: the demographic disaster of the revolution, the dramatic population boom that ensued and the rapid fertility decline that ended that boom. This is not the place to discuss the causes of the first; but it is worth considering the origins of the latter two phenomena. Population growth in particular might be explained in terms of three structural arguments. Mexico had been under-populated since the conquest: by Cook and Borah's (optimistic) estimates, central Mexico alone had been capable of supporting some 25 million people before either the Spanish conquest or agribusiness provided the

necessary food.[78] The decimation of the revolution only increased the gulf between the numbers the region could support and the small actual population. With basic stability and economic development rapid growth would be inevitable. Such growth was, moreover, not exclusive to Mexico: it was structurally determined by the universal advances in medicine of the late nineteenth and twentieth centuries. Between 1879 and 1900 European scientists identified the micro-organisms that caused some of the world's main diseases at a rate of one a year. Effective vaccinations followed for anthrax, rabies, diphtheria, typhoid, tetanus and (slightly later) tuberculosis. By the 1940s pharmaceutical companies had begun mass-producing sulpha drugs and antibiotics; meanwhile quinine and a new understanding of the malarial parasite's life cycle caused a revolution in malaria control.[79] Most Mexicans in 1900 were still clutching at the straws of charlatan remedies for the inevitable, such as linden flowers on the nose against cholera. Smallpox remained a scourge of indigenous populations; in 1903 the plague crossed the Pacific and broke out in the port of Mazatlán.[80] By 1960, in contrast, infectious disease deaths were roughly half what they had been in 1931. That year malaria killed 36,000 Mexicans; by 1970 it took only 33 lives.[81] Finally, Mexico was distinguished from the rest of Latin America by its neighbour, the US. Geography gave Mexico a comparative advantage in terms of investment, trade and remittances, helping the economics of supporting population growth (which was part-driven by economic growth, enabling Mexicans to marry younger).[82] It sometimes offered privileges in terms of technical assistance: the malaria campaign, for example, was both funded and part-operated by the US for reasons of public health and Cold War competition.[83] Moreover it gave a booming population the steam valve of migration, helping some to avoid the worst extremes of hunger or want.

None of these structural arguments can be dismissed outright (although the idea that migration possibilities influence sexual behaviour is at best questionable). Yet the counter-arguments favouring agency in shaping Mexico's population boom are powerful. Mexican governments were until the early 1970s strongly pronatalist: they used textbooks to link large populations with national success, banned over-the-counter contraception, offered prizes for fecundity and, in the case of Marte R. Gómez's Tamaulipas administration, established punitive taxation on bachelors.[84] More significantly, universal medical advances were delivered comparatively quickly in Mexico. Governmental preoccupation with public health stretched back to the Porfiriato. In the 1890s several states made the smallpox vaccine obligatory, and threats like the 1885 cholera epidemic in Veracruz were countered with vigorous preventive measures: town dwellers were ordered to clean, disinfect and whitewash their houses, suspected carriers of disease—both humans and ships—were quarantined.[85] Revolutionary governments intensified such programmes, the Cárdenas government in particular; it founded the Institute for Social Security (IMSS) and dispatched doctors, midwives and nurses deep into the countryside in the *misiones culturales*. (The resulting medical infrastructure was a key to the rapid later implementation of both malaria and birth control.)[86] Spending on health rose sharply; mortality began to decline steeply; life expectancy soared.[87]

Yet this was due to more than the efficient transmission of global medical advances. Mexicans began living much longer lives well before some of those advances—antibiotics, for example—were widely available. Agrarian reform, for all its flaws, did allow some Mexicans in some regions better and more reliable nutrition than before. As in Europe and America, much of Mexico's mortality decline was down to public health measures: proselytization for better hygiene, sanitation and nutrition, the construction of drinking water and sewage systems.[88] These were the obsessions of all stripes of revolutionary,
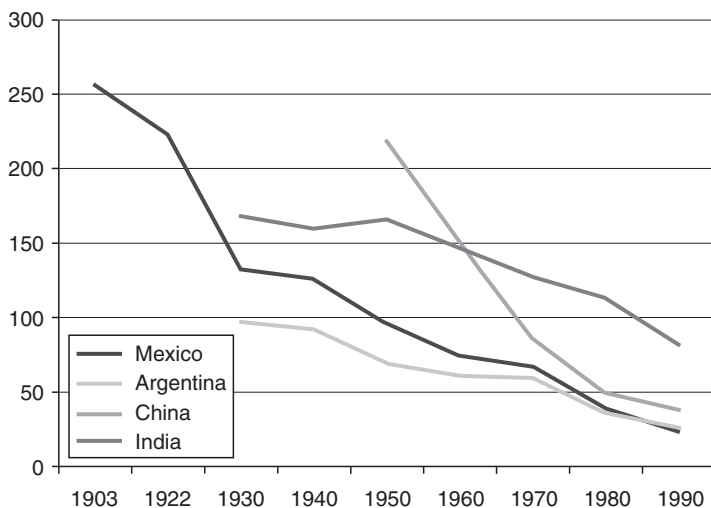
Figure 37.4   Infant mortality in twentieth-century Mexico and three comparatives. Data from INEGI Estadísticas Históricas de México CD-ROM, United Nations Statistics Division.

from Calles to Vasconcelos to Cárdenas to the village leaders who pushed for improvements from clean water to cantina latrines.[89] Across the century national, state and local governments consistently mobilized Mexicans to improve public hygiene, from the prisoners of the revolutionary years through the peasants forced into *faenas* (public works) to the *juntas de mejoramiento cívico, material y moral* of the 1950s or the Solidaridad programmes of the Salinas years. While this amounted in many cases to *corvée* labour, it delivered some of the public works central to improved health on the cheap. Mortality decline, moreover, was above all caused by a particularly rapid fall in infant and child mortality. Comparative studies stress the extent to which such falls are products of women's education and empowerment: there is an evident correlation, for example, between the relatively long school careers of women and relatively low infant mortality.[90] Furthermore, as Jolie Olcott has shown, Mexicans' improved reproductive health was not just the gift of a *dirigiste* elite: grassroots feminist organizations across the country campaigned hard for maternity clinics in the 1930s.[91] At the core of explosive population growth, in short, is a combination of phenomena common to several Latin American countries, but of peculiar intensity in Mexico: active elite campaigns for sanitation and public health, determined and persistent popular mobilization for the benefits of social development, a rapid increase in women's autonomy, and comparatively generous, early state investment in education and healthcare.

This fusion of popular demand and comparatively competent state delivery of services was also evident in Mexico's exceptionally rapid fertility decline. Everyday Mexicans took note of the strains of population growth before their governments, and increased their use of birth control even when it was broadly inaccessible: a survey in DF's Hospital Inglés in 1965 found that 88 percent of the women surveyed accepted the use of contraception.[92] Once made freely available in 1974, contraceptive use soared, from 30 percent of women in 1976 to 66.5 percent in 1995.[93] The Total Fertility Rate (the average number of children a woman has in her life) consequently plummeted: in 1970 it was 6.7, in 1981 4.3 and in 1996 2.7.[94] This testified, once more, to various peculiarities

of Mexico's twentieth century history. Women opted overwhelmingly for voluntary birth control, in some cases whether their husbands liked it or not. The Catholic Church, in stark contrast to its policies in other Latin American countries, did not oppose intensive promotion of contraception. (President Echeverría even claimed to have the sympathy of Pope Paul VI.)[95] The national government, for its part, neither legalized abortion nor introduced sex education. This quiet, pragmatic compromise was a clear legacy of Mexico's hard-won *modus vivendi* between church and state, whereby the church kept much of its social power in exchange for public discretion and a broad avoidance of political involvement.[96] The state, finally, delivered healthcare surprisingly effectively, investing heavily in hospitals, clinics and above all in rural health practitioners. A drastic change in Mexicans' reproductive choices took place with little coercion. Some doctors pressured women to accept IUDs or sterilization immediately after giving birth. The government publicity campaigns, on the other hand, stressed that birth control was a private and not a state decision. In India, by contrast, Indira Gandhi's Emergency Government engaged in forced vasectomies; while in China, the "one child family" policy has meant compulsory abortions and perhaps 20 million enforced sterilizations.[97] Both the population explosion and the fertility decline that ended it were strongly shaped by Mexico's political actors—both rulers and ruled—and owed much to revolutionary reform.

Like the rest of the world, Mexico would have experienced the population boom of demographic transition under any conditions; that much was structurally inevitable. And there were structural reasons for it to be an intense population boom. The main one was proximity to the US: a liability in the nineteenth century, an advantage, at times, in the twentieth. But the main reasons for Mexico's peculiarly large population growth and peculiarly rapid control of fertility lay in the agency, the choices of politicians and everyday people. Across Latin America countries significantly poorer than Asian success stories matched their public health records because of strong state commitment to goals such as cutting infant mortality.[98] Mexico's modern state was unusually intense in dedicating resources to such goals, to education, public health and medicine, particularly in the 1930s, 1950s and 1970s. The result was a population that multiplied sevenfold in eight decades. The structural impacts of that explosion were all-pervasive, ranging from the creation of one of the world's biggest cities to politicians' enthusiasm for neoliberalism in the 1980s. (They had, Rogelio Hernández argues, run out of the money to keep a big state for such a big population.)[99] These structural impacts were strongly politically shaped. Fertility decline, similarly, showed the political impacts of social revolution at their most effective. Catholic opposition was forestalled; broad provision of contraception was met with broad uptake, due to education and women's empowerment; the coercion that marred other country's campaigns was largely absent. Shaping how and when people have sex and die is difficult anywhere. In Mexico, the ghost in the machine of the revolutionary past animated state and popular efforts to produce a peculiar, in some terms peculiarly successful, demographic transition.[100]

Notes

1   An estimated 11.7 million Mexican nationals (documented and undocumented) in 2007. If the definition is broadened to include people of "Mexican ancestry" there were 20.6 million counted in the 2000 US Census. "Statistical Portrait of the Foreign-Born Population in the United States, 2007", Pew Hispanic Center Report, 5/iii/2009, *New York Times* 10/v/2001.

2   INEGI, *Estadísticas Históricas de México* CD-ROM (México DF, 2000), sinais.salud.gob.
      mx/descargas/pdf/NT_ProyCONAPOvsRPCP.pdf. The latter number is CONAPO's, cor-
      rected for estimated undercount in the 2000 census.

3   Massimo Livi-Bacci, *A Concise History of World Population* (Oxford, 2007), p. 102.

4   Robert McCaa, "Missing Millions: The Demographic Costs of the Mexican Revolution", in
      Mexican Studies/Estudios Mexicanos 19: 2 (Summer, 2003), p. 396.

5   Demographic transition theory models population as societies and their economies shift from
      ancien regime to postmodern patterns. Initially growth is slow or non-existent; with moder-
      nization come improvements in nutrition, public health and hygiene, causing the mortality
      rate to drop, and population to increase sharply; in the third and final stage fertility declines
      and populations stabilize or shrink. While this broadly describes Mexico, the theory in this
      case has two notable flaws: i) it assumes a hermetic population, unaffected by migration; ii) it
      holds that fertility decline "should" have happened significantly earlier than it actually did.
      Moisés González Navarro, *Población y Sociedad en México (1900–1970)* (2 vols., México DF,
      1974), pp. 14–15, Francisco Alba & Joseph E. Potter, "Population and Development in
      Mexico Since 1940: An Interpretation" in *Population and Development Review* 12: 1 (Mar.,
      1988), p. 48.

6   Once this path is chosen as state policy. Only Colombia, Indonesia and China achieved
      anything like Mexico's rapid fertility reduction in the last quarter of the twentieth century.
      Carlos Brambila, "Mexico's Population Policy and Demographic Dynamics: The Record of
      Three Decades", in Anrudh Jain, (ed.), *Do Population Policies Matter? Fertility and Politics in
      Egypt, India, Kenya, and Mexico* (New York, 1998), p. 157.

7   Corrected population estimates from the 2000 and 2005 censuses give an annual growth rate
      of 0.8 percent. By 2003 the Total Fertility Rate (TFR) was nearly down to replacement level,
      meeting the population growth targets set in the early 1970s. Joseph E. Potter & Axel I.
      Mundigo, "Fertility Planning" in Dudley L. Poston & Michael Micklin, (eds.), *Handbook of
      Population* (New York, 2006), pp. 752–3.

8   For Mexcan exceptionalism, see Alan Knight, "The Peculiarities of Mexican History: Mexico
      Compared to Latin America, 1821–1992", in *Journal of Latin American Studies* 24:
      Quincentenary Supplement (1992), pp. 99–144.

9   For overviews, see W. George Lovell, "'Heavy Shadows and Black Night': Disease and
      Depopulation in Colonial Spanish America", *Annals of the Association of American Geographers*
      82: 3, 426–443, James Z. Lee and Wang Feng, *One Quarter of Humanity: Malthusian
      Mythology and Chinese Realities* (Harvard University Press, 1999), Geoffrey Wheatcroft, "The
      Scale and Nature of Stalinist Repression and its Demographic Significance: On Comments by
      Keep and Conquest," *Europe-Asia Studies* 52: 6 (2000), pp. 1143–1159.

10   McCaa, "Missing Millions", p. 397.

11   The correlations between the rise of the *Annales* school and the decline of France, or the rise
      of dependency theory and the recessionary 1970s, are suggestive. For George Taylor's hem-
      line theory" see Tamar Lewin, "The hemline index, updated", *New York Times* 19/x/2008.

12   Both Cárdenas and Alemán described population growth as one of the achievements of the
      revolutionary state; De la Madrid attributed the beginnings of fertility decline to "deliberate
      demographic policy". González Navarro, *Población y sociedad*, pp. 43, 125, Miguel de la
      Madrid, "Miguel de la Madrid on Population Policy in Mexico", in *Population and
      Development Review* 8: 2 (June 1982), p. 436. Scholars in agreement would include Joseph
      Potter, Arundh Nain, Carlos Brambila and David Robichaux; for a more sceptical apprecia-
      tion, see Gustavo Cabrera, "Demographic Dynamics and Development: The Role of
      Population Policy in Mexico", in *Population and Development Review* 20: Supplement,
      pp. 105–120.

13   I have preferred Robert McCaa's revisionist estimates, which sharply increase mortality esti-
      mates, due to their use of (mutually reinforcing) inverse projection and cohort analysis
      methods, and their input of previously unavailable evidence such as US census microdata.
      McCaa, "Missing Millions", pp. 368–9, 384–5, 388, 393–5.

14 Alan Knight, *The Mexican Revolution* (2 vols., Nebraska, 1987), ii p. 420.

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For Further Research: Space, Sense, and Sensibility

AGEETH SLUIS

About a decade ago, a torrid debate raged in the pages of the *Hispanic American Historical Review* and beyond, tearing, or so it seemed, at the fabric of Mexican historiography. The issue was the advent of the "New Cultural History" and at stake—if many of its opponents were to be believed—was nothing less than the integrity of the entire discipline. Sparked by Stephen Haber's critique that condemned new cultural history as "both ontologically and epistemically subjective," a field marked by an absence of intellectual rigor where "anything goes," many of its practitioners rose in contestation.[1] What was cultural history? Was it a verb or a noun, a practice or a thing? Was it characterized by a particular theoretical approach, specific methodologies, or a certain range of topics? And, why or how did it matter?[2]

In the absence of definitive answers to some of the more probing questions raised by the debate, Mexicanists continued practicing cultural history. This *Companion* demonstrates the rich and innovative approaches and subjects that Mexicanists across borders have incorporated into recent historical scholarship of Mexico. In recent decades, cultural history, looking to ethnic and gender studies, new sources, and adoption of new methodologies, has enriched and deepened our understanding of the Mexican experience. Ranging from codices to consumption, demography to democratization, ethnographies to environment, penal codes to photographs, and six-year plans to soundtracks, the cultural analyses of new sources as well as previously neglected periods and spaces are exiting, enriching, and nearly exhaustive. In the face of such abundance, what remains to be investigated and what new approaches are possible? This chapter sketches some initial responses in answer to these questions and outlines some prospective and significant topics for future investigation.

If perhaps not all history, as Alan Knight offers, lends itself to cultural history, what topics then would make for not only fascinating and vibrant, but also viable, and even much-needed, new cultural histories?[3] An exercise in assessing "future directions" in Mexican cultural history should aim to address the concerns, insights, and suggestions of a larger community.[4] In the myriad of possibilities, I propose to look at cultural history

in a holistic manner, that is, without unhinging method from subject matter or source-base. In order to do so, this chapter organizes topics in a loose and hopefully creative way, around the confluences of space, sense, and sensibility. This approach is meant to provoke innovative ways to re-think our approaches and methodologies, rather than suggest that studies are necessary only in the outlined areas.

Why employ this rather arbitrary schema, especially in categories deemed vague and unreliable? Like many opponents of NCH who raised objections against the emphasis on cultural constructionism, Knight and Haber took issue with the postmodern use of concepts such as "space" and "the body." These "disorganizing concepts" were too all-encompassing, unwieldy, imprecise, and at danger of collapsing numerous categories into catch-all neologisms, especially in terms of their literal and metaphorical uses.[5] In keeping with Peter Burke's insights on cultural history's most promising territories of human experience—practices, mentalities, feelings, memories, and representations—I would contend that it is precisely because of their breadth, range, and depth that space, sense, and sensibility seem useful to not only maintain, but also thoroughly examine their potential as categories of analysis in terms of content, methodologies, and areas from which to explore a range of topics.[6] In this sense, this chapter is neither meant to be a complete list, nor a thorough assessment of existing scholarship. While I hope to contextualize these areas in light of current historiography, it is not my aim to provide a literature review.

Space

"Space is not the setting (real or logical) in which things are arranged, but the means whereby the positing of things becomes possible."

Maurice Merleau-Ponty[7]

In the late 1980s, while surveying new studies on the process and effect of the Mexican revolution, Mark Gilderhus embraced the idea of regional perspectives that, he felt, had been relegated to the "periphery." Here, the task was to gauge how the revolution had affected, and in turn had been affected by, particular regional differences in the country. Space, in short, proved important. Even if situated in regional, "peripheral," and hence different places, however, these studies did not take space as an agent in forging historical change.[8] As this *Companion* indicates, historians of Mexico have since started to grapple with space as a viable subject of historical analysis. We now have fascinating histories of a variety of places through and in time, including the exciting emerging field of environmental history evidenced by recent work by Christopher Boyer and Emily Walkild. After a short focus on regional histories, attention turned to urban areas, Mexico City in particular. Scholarship of border areas, the US–Mexican border in particular, has made notable gains as well.[9] With this "new" emphasis on place and space in terms of situating content, however, we do not yet have many studies that examine or shed light on *how* we study space, or privilege space as a category of analysis itself. This would go a long way in addressing earlier criticisms of the use of the term "space" in cultural histories without a clear indication of how we understand or use the concept.[10] Here, we can learn much from not only geographers, but also from cultural studies. How are spaces represented? What political consequences does "the production of space," as Henri Lefebvre called the process of envisioning the relationship between place and power, have in Mexican history?[11]

In this sense, colonialists seem to have already taken more steps towards critical theories of space, as have some historians of the revolution. For instance, Thomas Sheridan's

work on frontiers, Cynthia Radding's impressive comparative studies exploring the role of space informing the colonial project, Sonya Lippsett-Rivera's recent inquiries into a "hierarchy of space," as well as Raymond Craib's analysis of maps, Patrice Olson's examination of the place of architecture in nation-building efforts, and Thomas Benjamin's chapter on revolutionary monuments register as particularly innovative.[12] These important works notwithstanding, we need more histories that explain the mutually constitutive relationships between space and categories of race, gender, and class as well as studies that analyze how places are remembered and historicized.[13] Some important theorists who have written seminal works on the importance of space as a useful category of analysis, like Henri Lefebvre, Doreen Massey, Elizabeth Grosz, Edward Soja, and David Harvey would be of help here.

As Bill French reminded us during the NCH debate, approach matters more than mere choice of subject matter. In surveying works that incorporated an analysis of public spaces, French notes that it is in understanding the power of "imagining" the "discursive constructions of space" that historians can understand the role of space in either effecting or subverting social control.[14] In short, by understanding space in a systemic manner, as a system of signification that produces subjects, we can no longer treat places as neutral, static entities without a history. Moreover, the transparency of "the agency of historians and the way they are implicated in the text" deserved disclosure and examination, said French.[15]

Before outlining a series of possible topics then, it is of the utmost importance to determine how to approach them. Paul Gillingham's chapter in this volume, for instance, asks us to consider structuralist methods and topics, such as demographics, urbanization, and migration, as valuable subjects for cultural analysis. Ricardo Pérez Montfort's chapter in this volume beautifully illustrates how urban history has made considerable inroads in chronicling the Mexican experience. The city, especially the development of the megalopolis spanning the Distrito Federal, provides us with almost limitless opportunities in terms of the analysis of the experiences of the urban dwellers, not only in the economic, political, or social aspects, but how they have constructed their identities based on the local activities in places such as taverns, cemeteries, parks, markets, and other spaces that influence social relations, values, and deliver particular and local experiences. Here, we have plenty of sociological and anthropological studies, but not many studies produced by historians.

What spaces then offer themselves to such approaches? Here we can divide our approaches to space into a number of areas, covering a vast array of places. First, in applying critical approaches such as those offered by Lefebvre, Foucault, Massey, and Grosz, we do well to revisit "old" spaces such plazas, barrios, markets, and houses. While Latin Americanists have excellent inquiries by geographers such as Setha Low, and a recent article by Francine Masiello, cultural histories outlining the importance of plazas in shaping social and political culture, historical memory, as well as local and national identities would add much to our understanding of how space constructs ideas of self and other, informs or expresses social relations, and gives shape to political structures not only in the colonial period, but just as much after Independence.[16] Barrios similarly have much to teach us about the formation (and maintenance) of social relations. Histories elucidating the role of barrios in forging community identities and grassroots activism deserve far more attention. The impressive community organizing in the wake of the 1985 Mexico City earthquake is but one telling example that begs for a cultural history all its own. While other public spaces—such as parks, restaurants, streets, shops, theaters, and

stadiums, to name but a few—deserve more attention, private and semi-private spaces—such as the house, the kitchen, the garden, the convent, the presidio, the brothel, the bath house, the sport club, the hospital, the church, the army barracks, the prison, such as Lecumberri, and a more recent addition, the gated community (especially in conjunction with its role of the construction of the private sphere)—constitute particularly important areas of cultural investigation.

Apart from these urban and urbanized spaces, the countryside—as site of both *Mexicanidad* and Otherness, often constructed as a place outside of time—is in dire need of sustained cultural analysis. In spite of recent efforts, Mexican history overall suffers from a lack of engagement with post-1940s rural spaces and questions, something cultural historians need to address as well.[17] As Gladys McCormick remarks, the "historiography persists in treating rural history as an anachronistic remnant of those bygone Marxist days of the late 1970s and 1980s." Despite the meteoric rise of the capital city in the twentieth century, rural areas accounted for approximately two thirds of the total population in the period spanning from the 1940s until the 1960s, yet no current cultural histories exist that reflect the importance of the countryside in forging particular Mexican identities after 1940.

In the attempt to conceptualize space and place beyond its well-ingrained binary of rural versus urban, and nature versus built environment (a naturalized division itself begging for historical analysis), we do well to embrace histories of movement. If we think of space as something both shaped by, and giving shape to, movement, we are in dire need of studies that focus on the technologies, vehicles, structural changes, human agency, and cultural shifts that make movement possible. Transportation, not only in its political and economic importance but also in terms of shaping place, and the cultural change forged by compressing space and time, is a terrain rife with possibilities for new cultural histories. Recent work on the social, political, and cultural changes wrought by railroads in the nineteenth century and roads in the revolutionary period provide an excellent start that we need to pursue on a greater scale.[18] A cultural history of Mexico City's metro seems an obvious choice, as do histories of mule trains, *tranvias*, busses, and bus stations. Cast broadly, a cultural examination of transportation systems could shed much light on developing comparisons with similar initiatives abroad.

A second issue of traversing space brings us to the urgent call for histories of migration. Unsurprisingly, anthropologists have done a lot more work in studying migration, particularly across national borders, yet there is a dire need to historicize these and other migration patterns.[19] Here, I believe it is important to study migration flows, rather than mere immigration. The Bracero program would be an excellent candidate for such a history, but also the (re)creation of barrios and communities across borders, and a history of the border as an agent of historical change itself would be great fields for historical inquiry. Liminal spaces such as frontiers, more thoroughly explored by colonialists, but also other boundaries, thresholds, and containment zones are all of enormous promise. The construction of "the North" within histories of migration and immigration, as well as the maquiladoras and border towns, would serve as other opportunities to understand the cultural and social dimensions of migration.

Approaching liminal spaces, including the utopian, dystopian, as well as heterotopian and virtual places, from the purview of cultural history indeed promises a great yield. First, there is the land of "Mexerica" or "Amexico." In the spirit of "El Gran Pueblo," it would behoove historians of Mexico to launch inquiries into the development of transnational spaces, and their effect in constituting and sustaining new subjectivities. William

Beezley and Colin MacLachlan conceptualized Mexican history early on as one stretching beyond the US–Mexican border, as much so after as before 1848, and showed that such inquiries can provide us with a much better understanding of "the Mexican experience."[20] Transnational spaces other than the border, such as those forged by international tourism, business ventures, science, and diplomacy also provide exciting new possibilities. Some beginnings have been made in terms spaces of leisure, principally by Dina Berger, Andrew Wood, and Eric Schantz, yet studies focusing on resorts and resort towns, such as Acapulco, Cancun, and Mazatlan to name a few, could add much to not only Mexicanist but larger transnational historiographies of travel.[21] The role of ecotourism, historical tourism, cruise-ships, and Mexico's role in the construction of "the beach," as well as US retirement and other ex-pat "colonies," are rich areas for historical mining, as are the spaces implicated, transformed, and produced by other transnational currents (at times *avant la lettre*, in case of colonial history) such as narco-trafficking, (neo) liberalism, and religion. Virtual spaces and what Michel Foucault deemed heterotopias, which could include sacred spaces, *las republicas indias*, the palace, the underworld, the slum (such as cuidad Neza), the campo, the ejido, the (guerilla) jungle, and the Internet would make for outstanding topics as well.[22]

Finally, there are the spaces of memory to explore. Archeological sites, museums, monuments, graveyards, archives and history theme parks, whether serving (and served by) nation-building projects or commercial ventures, have not yet received the historical attention they deserve.[23] While some attempts have been made to chronicle the history of the Museo de Historia e Antropología, no comprehensive study of Mexico's foremost historical showcase exists to date. Cultural analysis of other places of memory could include modern-day histories of archeological sites like Chichen Itza, Teotihuacan, or Monte Alban, but also the Archivo General de la Nación, the centro historico, or a *longue-durée* histoire of Tepoztlan, a veritable anthropological laboratory for most of the twentieth century.

Sense

> "I conceive that Ideas in the Understanding, are coeval with Sensation; which is such an Impression or Motion, made in some part of the Body, as makes it be taken notice of in the Understanding."
>
> John Lock [24]

In cultural history, as in cultural studies in general, the last decades have shown a move from concern over "hearts and minds" to one with bodies and senses, and from interest in mentalities to one in sensibilities. Indeed, before the advent of the Cartesian split, John Locke noted that sensation, feeling associated with the body, played a key role in our construction of reality, including our capability for abstract knowledge. Hence, it is not only that we know the world through our bodies—through sense perception—that is of interest to us, as fascinating as this might be in and of itself, but how we have historically constructed the body to give a place, a schema, to what we perceive with it. For instance, the much-touted division of gender versus sex, where gender is culturally constructed and sex is biologically determined took a hard hit when scholars like Thomas Lacquer showed that the sexed body itself was a historically-dependent cultural construction.[25] Moreover, in defiance of what we now—even scientifically—understand as a rather arbitrary Cartesian split privileging the mind, I propose that histories contextualizing the construction of embodiment tell us much about how gender, race, class, and

ethnicity have been imagined, plotted, implemented, and implicated in regimes of power, including resistance. Moreover, the joys and pains of embodiment structure daily lives.

The history of the body is a fairly new area for historians in general, and a field that historians of Mexico especially have yet to mine for its full potential. In this sense, our colleagues studying Europe and other areas of the world have started to examine bodies in a vast array of settings and power configurations, including "the body as experience and as symbol, … dismembered bodies, anorexic bodies, athletic bodies, dissected bodies and the bodies of saints and sinners."[26] Developed from the fertile ground of the history of medicine, gender studies and theories by Michel Foucault, Mary Douglas, Judith Butler, and Donna Haraway, the body is a great organizing concept in the study of the development of subjectivity, identity politics, and social control and governability. In these other fields, histories of the body have provided us with important insights into the construction of gender, sex, and sexuality, discourses of deviance and abjection and their effects on the production of race and class. Studying cultural practices from the perspective of the body, especially through the conceptualization and regulation of the senses, tells us much about how bodies serve or subvert particular regimes of power. The body is not merely what we are, or inhabit, in a rather *reductio ad absurdum* that Knight leveled against NCH.[27] Rather, as a socially and culturally constituted text, a surface that can be read and is thought to communicate meaning, I propose the following rather arbitrary sequence: sight, sound, smell and taste, and locomotion.

The centrality of the eye has by far dominated cultural histories of the senses, and not only those about Mexico. Histories focusing on, or at the very least incorporating, an analysis of visual culture have done a great job in using a vast array of sources previously neglected by historians ranging from art, advertisements, and architecture, to religious processions, plays, puppets, comics strips, and other artifacts of popular culture. Histories of representations, particularly in film, photography, muralism, and other artistic production in the wake of the revolution, have made great inroads into our understanding of Mexican cultures during the twentieth century. Yet, even if the eye represents a privileged area of investigation and images are now readily used and analyzed within cultural histories, we do not have many histories that favor visual culture as a line of inquiry in its own right. For instance, other than Debra Poole's ground-breaking work and Deborah Dorotinsky's contribution in this volume that explore the role of photography in anthropology, especially in the construction of "the Indian," there are but few studies focusing exclusively on photography as an agent in constructing social, gendered, and raced subjects, especially through the lenses of science, art, and entertainment. Visual media connected to the institutional revolution, especially film, has commanded attention, yet—with exception of Celeste Gonzales-Bustamante's pioneering work on television—no media histories exist for the post 1940 period.[28] Another visual source of popular culture not yet explored is graffiti. For the colonial period, much visual production is left to art historians, including such rich materials as the Casta paintings.

In contrast to the all-seeing eye, the ear has not yet merited much attention by cultural historians of Mexico. Sound, even noise, such as evidenced in a recent enlightening NPR report detailing the soundscapes of Mexico City, could add much to our appreciation of Mexican cultures.[29] While we now have some histories of early radio and counter-culture rock music, a critical, comprehensive, and historical study of Mexican music is plainly overdue.[30] While a growing body of work exists that dissects the complex relationship between the state and musicians, a cultural history of Mexican music in relation to ideas of gender, race, nationality, modernity, and cosmopolitanism is nec-

essary. Instead of placing so much importance on the state, we are well advised to explore more fertile avenues, such as the role of private entrepreneurs on the development of artistic networks. Meanwhile, multiple forms of musical expressions of the nineteenth century are left unexplored and unheard. In addition to cultural histories of music, which can take many forms and cover many regions, a renewed emphasis on, or critical analysis of, the spoken word, including oral history, would add to Mexican histories of the ear.

Next, we turn to the politics of taste. Jeffrey Pilcher has been a trailblazer here, writing eloquent cultural histories of food; tamales and beef in particular. The study of alcohol has received increasing attention, especially in context of morality campaigns in the wake of Bourbon Reforms and the revolution, as well as in forging spaces of popular class sociability during the Porfiriato.[31] However, much remains to be uncovered. The globalization of Mexican food, the rise of tequila as international commodity fetish, drugs and drug cultures, as well as food as means of resistance are all fields awaiting sustained focus by cultural historians of Mexico.[32]

Body modification, whether out of spiritual conviction, class prescription, or the dictates of fashion, provides tantalizing opportunities for inquiry and offers researchers numerous angles for analysis. Clothing, sumptuary laws, flagellation, and whitening are all cultural practices through which to better understand the construction of gender, race, and class. While we have some work on beauty contests, these generally analyze the construction of beauty in the service of nationalism.[33] Yet, the normalization of beauty ideals to fit class and race hierarchies, the commodification of certain body types in plotting the course of the nation, or the rise of the beauty industry and its power in shaping modern subjectivities are only some of topics awaiting cultural analysis.

As a counterpoint to the modified body, the moving body is an equally fascinating subject in need of cultural examination. Apart from Heather Levi's recent anthropological study of lucha libre, Anne Rubenstein's brief foray into the world of futbalistas, and occasional studies on sports in Mexican-American communities, we have few to no histories of sports in Mexico.[34] While the possibilities are nearly endless, a number of topics stand out. Futbol, especially in its links to spatial construction of identity (city and nation), gendered subjectivity, as well as to politics, is obviously screaming for historical examination. From club sports to regional and national divisions, futbol provides cultural historians with a treasure trove of material in terms of understanding national and regional identity formation, masculinity, ethnicity, and fan culture. Needless to say, there is also an important transnational element to sports, especially that of athleticism as a tool in disciplining the body in favor of either the state or global capital. Its early links to eugenics and other means to manipulate race are a case in point. A history of dance is another neglected and very promising area in terms of understanding gender construction, national identity formation, youth culture, and the rise of leisure industries. A history of dance could focus on an array of subjects, ranging from dance halls and salons, dance styles (Mexico's "own" style, Danzón, does not have a definitive history), Mexico's Ballet Folklórico, the influence of transnational cultural forms, as well as the role of dance within practices of courtship and desire.

Looming large in the realm of the sensed body, as a combined product of all senses, is gender—something that historians of Mexico have only begun to study in earnest. In two seminal works, *Gender Trouble* and *Bodies That Matter*, Judith Butler demonstrated how normative gender roles come into being through discourses of performativity, which entails the formation of subjectivities in accordance with a limited set of choices within

heterosexual boundaries set by normative discourse.[35] Butler uses performance as a met-aphor to understand that "nature" does not exist, and thus biologically equivalent bodies may "perform" different genders and forms of embodiment. Only certain performances are discernable within the larger constructs of normality, and these are then the only ones that "matter."[36] Butler's concepts of gender performance and "bodies that matter" help us understand how subjects are read, especially through sense perception.

If male subjects once dominated Mexican historiography, an explosion of studies on women now marks the colonial and revolutionary periods especially.[37] Sustained scholar-ship on women for the post-1940 and pre-Porfiriato periods is still lacking, however. More importantly, besides the excellent "add women and stir" histories we now possess—"women and the Revolution," "women and the labor unions," "women and the Catholic Church"—we need histories that systemically incorporate a gender perspective no matter what its principal topic.[38] To truly incorporate gender into our histories as a useful category of analysis, to speak with Joan Scott, we need to understand the historical constructions of femininity and masculinity, and their political and eco-nomic consequences. Gender is a crucial analytic frame for all Mexican history, and a new historiography should reflect this.

Masculinity still represents an understudied area of inquiry. Studies on crime and the criminalization of (homo)sexuality during the Porfiriato and revolutionary period in works by Rob Buffington, Pablo Picatto, and Katherine Bliss implicitly address issues of masculinity, the influence of current studies on men in the field of anthropology has set the tone for future histories.[39] Matthew Gutmann and Annick Prieur have produced work that deals with the construction of masculinities in relation to male sexuality (whether straight or gay) in mostly working-class areas, such as Mexico City slums. In *The Meanings of Being Macho*, Gutmann effectively debunked the idea of machismo as a deep-cultural trait. Instead, masculinity emerges as a fluid and highly negotiated con-cept, which actually "means different things to different people at different times. And sometimes different things to the same people at the same time."[40] In addition, early work on hero cults by Ilene O'Malley—pre Joan Scott—already showed the great impor-tance of the construction of new masculinities in the wake of the revolution, its political power, and enduring socio-political legacies.[41] Similar approaches would prove helpful in augmenting our understanding of how the sensed body constructs politics during other regime changes in Mexican history, as well as how it informs formulations of modernity and economic development.

The ways in which we are taught to perceive raced and aged bodies could do with a similar systemic focus. Excellent path-breaking studies on childhood by Eileen Ford and Elena Albarran (in this *Companion*), have pioneered this exciting new field in Mexican historiography, yet this is merely the beginning of a trend to understand the multifarious implications of the constructions of age. As such, they point us in enticing new direc-tions: histories of infancy, adolescence, parenthood, but also adulthood and old age. Constructions of *Indigenismo* as bodily difference also stand in dire need of historical analysis, not merely as a tool or expression of the revolution, but between and across the nineteenth and twentieth centuries, as Maria Muñoz' and William Beezley's chapters in the volume indicate. Moreover, histories of racial and ethnic others beyond those of European or indigenous descent, such as those of African, Asian, and Middle Eastern heritage, also deserve a sustained focus that has thus far been lacking. Whether situated within the colonial or national period, such studies would also shed much-needed light on the mutually constructive relationship of race and gender in fashioning and sensing

others. For instance, it appears that at various times economic and political elites used racial discourses to ascribe qualities to indigenous peoples formulated in discourses of idealized femininity: abnegation, humility, and obedience.[42] In conclusion, the sensing and sensed body provides with us a map in social relations, a means by which people are included or excluded, invested with power or denounced as other. A new historiography of sense—whether through visual culture and gender performances, or the politics of taste and structures of sound—opens up creative ways to think and re-think our way through the Mexican experience.

Sensibility

sen·si·bil·i·ty   [sen-s*uh*-**bil**-i-tee] *noun* 1. capacity for sensation or feeling; responsiveness or susceptibility to sensory stimuli. **2.** mental susceptibility or responsiveness; quickness and acuteness of apprehension or feeling. **3.** keen consciousness or appreciation. **4.** Sometimes, **sensibilities:** liability to feel hurt or offended; sensitive feelings. **5.** Often, **sensibilities:** capacity for intellectual and aesthetic distinctions, feelings, tastes, etc.: *a man of refined sensibilities.*

Why utilize sensibility, a concept reeking of early nineteenth-century romanticism; what we begrudgingly must acknowledge as canonical literature in case of the Brönte sisters and Jane Austen, yet like to condemn as sentimental drivel when related to anything other than novels and poetry. Something, moreover, that is uncomfortably European, imperialistic even, in the face of "authentic" Mexican culture? Yet, I believe sensibility offers Mexicanists something of value. First, a new direction in cultural history concerns itself with the creation and registration of affect, a recent addition to the growing theoretical and methodological spectrum of cultural studies. Understood through the philosophical musings of Spinoza, especially as translated through the works of Gilles Deleuze and Felíx Guattari, affect—while in a direct relationship with emotions—parts way with the idea of individual feeling due to its inherent power in knowing as a referent outside of oneself. Hence, instead of studying mentalities, something cast as a mind-oriented, self-evident structure of meaning, such as a worldview, sensibility, in communicating a larger framework of feeling and emotions, allows us to plumb the constructions of love, humor, anger, fear, pain, pleasure, even spirituality and religiosity. Second, in its earliest meanings, sensibility also communicated sensitivity, emotionally or intellectually, to the world of objects. This then, would allow us to extend our realm of the senses to include material culture.

Subsequently, our remaining sense, touch—something more tricky to trace—is more easily conceptualized within the framework of sensibility. The touching and touched body has been most often chronicled through sexuality, and—to a lesser extent—violence, areas that have received most attention in Mexican historiography. As with many other cultural histories of Mexico, much has been focused on the role of sexuality within the context of State building efforts. Hence studies that have conceptualized prostitution, sexual health, and the production of sexual deviance from the perspective of the State, no matter how enlightening, have run the risk of narrowing a very broad spectrum of sensual experience to the matter of sexual governance. In volume one of *The History of Sexuality*, Foucault called for an emphasis on pleasure rather than sex-desire as a means of subverting normative, prescriptive roles. Even if we need more scholarship that analyzes the role of desire within the Mexican experience, I believe that

future cultural histories would be well served to approach sexuality from the perspective of sensibility, especially pleasure. That stated, sexual desire remains an area where historians of Mexico have much work to do. Again, colonialists have written more on desire than most of us studying the nineteenth and twentieth centuries. Roland Green and Pete Sigal, for example, have examined desire within the context of conquest, situating sexuality as a crucial and effective tool in the colonization of indigenous peoples.[43] Beyond the study of prostitution and sexual crime during the Porfiriato and revolution, we need more work dealing with other time periods as well as a much larger conceptualization of the topic, especially in understanding the construction of heteronormativity and non-heteronormative sexualities and their larger social and political effects. While histories touching on male homosexuality in the Porfirian era, the 41s in particular have opened a space for exploration, not many of us have followed.[44] Yet, this area provides us with many clues to understanding not only notions, developments, and constructions of masculinities and femininities, but also their importance in configuring race and class relations as well as state affairs of sexual governance.[45] Anthropologists and sociologists have given us fascinating glimpses into the vast and varied world of contemporary Mexican sexualities, and literary scholars have examined the work by some gay authors in the twentieth century, yet there are yet no exhaustive histories on homosexuality, gay movements, and non-heteronormative behaviors and spaces.[46] Furthermore, the stress of recent works generated by anthropologists and sociologists on contemporary sexuality in Mexico clearly focuses on masculinity and male homosexuality, with studies on female sexuality (other than prostitution, which is still studied more from a labor and social history than cultural history perspective) and the relationship between sexuality and femininity significantly lacking. Histories of lesbians in Mexico are altogether nonexistent.

The medicalization of sexualities, sensuality, and the body in general, have enjoyed some scholarly attentions, but this field is also in its infancy. Matthew Guttman's, Katherine Bliss', and Gabriela Soto Laveaga's first examinations on the role of the state in regulating bodies' reproductive functions through public health policies provide us with great insights that need much more historical elaboration.[47] Here, studies of birth control, especially the pill, but also abortion and family planning would provide us with great insights into the means of regulating both population growth and sexual practices, as well as gendered agency and choices in sexual matters. Similarly, cultural histories of diseases, especially during time periods other than the conquest and early colonialization, would also enhance our understanding of the importance of the body in delineating class, race, and gender difference.

In addition, control over bodies through violence, torture, and other types of physical discipline as well as the body as a site of resistance—something understood better for the colonial period and incrementally through the study of crime in the works by Pablo Piccato, Robert Buffington, Ricardo Salvatore, and James Garza for the late nineteenth century—is something that deserves far greater attention across historical periods, especially as an inherent aspect of state repression and social upheaval.[48] For instance, political violence in post-1950s Mexico is an important area of investigation that has not been studied. The strategic deployment of violence has been a key tool of social control for the Mexican state which has only recently come to light, especially due to the declassification of the secret police files (Direccion Federal de Seguridad and the Direccion General de Investigaciones Politicas y Sociales). This field of inquiry could lead scholars to think about the role of violence, detainment, and containment of particular bodies in the

forging of Mexico's unique brand of self-reinforcing authoritarian modernization. It could also help us understand the cultivation of fear, influencing dynamics inside the regime and power plays among players arranged across political hierarchies.

In the study of emotion, love has proven most elusive, not only in cultural histories of Mexico. William French has bravely gone where few have dared to tread, studying love letters, the role of sensibility and feeling within the construction of the Porfirian middle class, and *rapto* and *estupero*.[49] By allowing for the role of love (and constructions of love) in especially the latter, French effectively subverts traditional interpretations that situate these nineteenth-century practices within a framework of sexual violence, demonstrating the rich potential for the study of sensibilities in altering our reading of Mexican culture. Similarly, Susan Kellogg has noted that the scholarship of "the encounter" and "subsequent conquests" in colonial Mexico by "applying the concepts of love and desire to a period when domination, hatred, and war have seemed more important to the larger story of Conquest," have provided a focus on sensibility that has proved that human relations during period were more complex than "discontinuity, disruption, and decline."[50]

Another area served well by inquiries based on sensibility, and indeed one where historians have already used such frame, is that of spirituality. While the colonial period, as well as Reforma and Revolution, have enjoyed most attention from Mexicanists interested in religion, the majority of these are, again, institutional histories concerned with the relationship between Church and State without paying too much attention to religiosity, something that has only recently has started to enjoy greater attention.[51] Overall, we need more studies of Protestantism in Mexico, indigenous religious practices, and other alternate forms of spirituality, such as New Age movements. Additionally, cultural histories of Catholicism in the twentieth century beyond the Cristeros are much needed. The influence of Liberation Theology in Mexico, an especially privileged area of religious history elsewhere in Latin America, has also not yet garnered much attention, nor has the post-Liberation Theology period.

Sensibility has been linked to material culture in its earliest formulations. The world of objects, informing, reflecting, and extending our senses and sensibilities, hold great promise not only in elucidating, but also synthesizing, the importance of culture in studying and writing history. Here, an array of cultural artifacts (architecture, archeology, consumer culture, beauty products, fashion, design, but also *artesanías*, *retablos*, and *milagros*, to name but a smattering) offers itself up for the study of cultural history. Moreover, besides a treasure trove of topics, studying material culture allows for innovative methodologies and approaches, especially in unearthing the unspoken and often unrevealed aspects of daily lives. Leora Auslander argues that material culture comprises "the semiotics of such cultural practices that often only reveal themselves when one is *not* at home."[52] Auslander's book on cultural revolutions forces us to consider the importance of material culture, especially in enhancing our ability to perceive change through objects, in rethinking traditional models of worldview, culture, and even periodization.

This brings us to the last area I want to employ in my argument for the utility of histories of sensibility. As the historian's most treasured and most problematic objects of study, time and memory implicate the historian as an author in their construction. First of all, in studying the effects of institutionalized memory, history, and our role within the production of it, we need to take stock of the politics of slicing up time. There seems a consensus among most Mexicanists to "decenter" traditional periodization and study subjects beyond and across the segments of time ordained by well-entrenched patterns of historiography. In tracking the continuities and change with regards to the coming and

going of the revolution, aforementioned studies such as those by Katherine Bliss, Susie Porter, Pablo Piccato, Jeffrey Pilcher, John Lear, and others use a diverse collection of cultural phenomena to observe the effects of regime transitions. Approaches such as these are needed for earlier periods as well, particularly the reign of Carlos III, Carlos IV, and Fernando VII. An era particularly well-suited for the application of concepts such as transnationalism, the international circulation of ideas, and the transmission of technologies, ideas, consumption, material culture, and—dare we say—sense and sensibility itself, is the Enlightenment and early national period. Here, a renewed emphasis on the traveler, including scientific travelers such as Alexander Von Humbolt, will yield great fruit. Similarly, more exploration of the continuities, rather than differences, between the nineteenth and twentieth century is needed, as is extending our studies further into the recent past, especially post-1940, when looking at politics, economic development, mass culture, and migration.

The need for alternate periodization is also evidenced by gender, race, and class considerations. For instance, while the scholarship on gender and the revolutionary state resulted in a wealth of new materials and conclusions, it did privilege (and reify) the State, mostly as a purely repressive and totalizing entity. The post-revolutionary period lent itself well to the examination of the perimeters of power and reformulation of citizenship, and hence the State remained a prominent actor in women's histories well into the new millennium.[53] Yet, the "just add women and stir" approach is highly deficient, considering that women's and gender history requires new methodologies, sources, as well as periodization and will thus transform histories rather than add to them.[54] Some of the better histories on gender in revolutionary Mexico straddle the period from 1890s until the 1920s, showing the continuities and change from the Porfiriato through the early revolutionary state formation.[55]

In taking the pulse of a new generation of cultural historians of Mexico on ways to decenter traditional periodization, the consensus points to taking our studies out of the teleological strait-jacket of the State and institutional history, placing them instead within frameworks of economic currents, particularly those generated by private, individual, or smaller group economic incentives. The political science model that is focused on institutions still informs too much economic history of the nineteenth and especially twentieth century. For instance, a dearth of social and cultural histories of the post-war industrial working class that reach beyond the narratives of labor institutions (a history of acronyms) characterizes much of existing scholarship. The need to "write out of the corporatism model" that too often portrays the rank-and-file as a passive appendage of unions, would lead Mexicanists to produce the kind of textured working-class histories as those produced on Chile and other parts of Latin America. Alternate periodization also shapes the crucial need for sustained, non-*sexenio* structured business histories. While textiles, banking, and tourism histories have filled in some of the spaces on the rather blank map of business history, Mexico's biggest post-war sectors—oil, mining, automobiles, film, construction, narcotics—are almost untouched, as are the captains of those industries and their symbioses with political elites. The most notable example is the world's third-richest entrepreneur Carlos Slim. Moreover, histories of resources, especially water, beg for a cultural perspective as well.

We need to understand the broader and deeper cultural shifts in assessing the economic changes during the post-1940 period. The cultural construction of the "Miracle" and the transition to neoliberalism form particularly fertile ground for such investigations. Dissecting neoliberalism's ideological messages teaches us about the influence of

corporate culture that stresses individual *superacion* over structural explanations for poverty in creating the perfect neoliberal subject. The ongoing, increasingly intensifying process of cultural hybridity and spatial-directional reversal of "cultural imperialism flowing south-to-north" in the context of neoliberalism and transnationalism are additional issues in dire need of analysis. While not meaning to undercut the political potential of such a reversal, I think we need to recognize that it is also couched in the construction of the "neoliberal moment" and its attendant discourses. Here, the emphasis on entrepreneurs, including Carlos Slim, Televisa, narco-traficantes, as well as Mexican actors and directors in Hollywood, testifies to the importance of studying cultural brokers as both the product and the production of the new Mexicanness. Understanding the cultural, including counterculture, production, appropriation, commodification, and mass-media fetishization of de-historicized popular icons (Virgin of Guadalupe, Kahlo, Zapata, Marcos, *Betty la fea*) within "transnational Mexico" teaches us much about the cultural politics of economic currents as well.

In the wake of two major centenary commemorations in 2010, the 1910 Revolution and 1810 Independence Movement, memory is an area that looms large indeed in contemporary Mexican consciousness, and one that historians of Mexico have addressed in piece-meal fashion. Thomas Benjamin examined the solidification of memory of the revolution into La Revolución, and the history of Independence celebration has been studied, but many more watershed periods that get solidified in national memory over the exclusion of others stand in dire need of examination.[56] Overall, historians of Mexico need to have a better grasp of memory, especially in applying theoretical models on memory to a number of periods. Pierre Nora's *Les Lieux de mémoire*, serves as a useful model on national memory and commemorations, yet, this area is but a small part of memory studies.

Indeed, in light of the growing interest in alternative histories outside the framework of institutions tied to the crown or nation-state, local memory, the memory of groups, as well as amnesia and trauma, provide us with fascinating new projects to embark on. Followed by courageous first forays in unearthing the personal experiences of the Tlatelolco Massacre, we have started to study the student movement of 1968 in earnest, yet it would help to also study the construction of memory of those events and movements.[57] Other examples that figure prominently in potential histories of remembering and forgetting are strikes and worker movements, post-1940 feminist movement, the 1985 earthquake, the 1988 elections, and the 1994 EZLN uprising.

Transnational aspects of memory construction and the commodification of memory is also important here, as the growing international interest and staging of celebrations such as Cinco de Mayo, Día de los Muertos, and the Guelaguetza indicate.

Conclusion

It has been ten years since the fateful debate tore through the field of Mexican history. While productive at some level, it left us with more questions than answers, and then quickly receded into the mist of time itself. Despite the lack of controversy in the intervening years, the field of cultural history of Mexico, new or not, continues to thrive and does so in innovative, vibrant ways. Even if we still don't know exactly what cultural history is, we know what it entails. In fact, the uncertainty over what it should not be and should not cover has proven productive, as researchers were left free to envision a multiplicity of perspectives to cultural history. Indeed, as Alan Knight pointed out, the problem

in assessing cultural history's contributions—as well as mapping its future—lie in the difficulty to "home in on a moving target."[58]

In this short chapter, I have tried to outline the possible uses of conceptual frameworks centered on space, sense, and sensibility in order to trace the trajectory of a moving target, the "Mexican experience." Interest in inquiries concerned with space, sense, and sensibility are not new. Foucault, with his usual and endearing flair for hyperbole, said that if the nineteenth century was characterized by a concern with time, the twentieth century was to be the age to embrace space. If, as Henri Lefebvre notes "every society … produces a space, its own space," cultural historians of Mexico have a need to examine how Mexicans produced theirs at different historical intervals and why they chose to do so.[59] Friedrich Nietzsche called for a history of emotions in *The Gay Science* (1882), only to be eclipsed by the advent of essentialist Freudian notions that proclaimed human feeling innate, constant, predictable, and outside the reaches of time. The meanings ascribed to sense and sensibility, however, are dependent on time and place, and as such they hold enormous promise for cultural historians.

In grafting the frames of space, sense, and sensibility onto existing trends of scholarship and outlining future uses, I hope to have shown that we have increasingly embraced interdisciplinarity in our methods, hybridity in our application, and inclusivity in our choice of subjects.[60] Heavy borrowing from other disciplines, and even more important, reading heavily in those disciplines, has enriched the way we practice history and the many insights we have gained. Choosing from a near endless list of research topics, we want to consider how we "do" cultural history and, more importantly, what we want cultural history to accomplish.

Notes

1 Stephen Haber, "Anything Goes: Mexico's 'New' Cultural History" *Hispanic American Historical Review* 79: 2 (May 1999): 309–330.

2 The confusion of what cultural history actually entailed was not confined to Mexican historiography, however. Peter Burke, one of the field's most eminent historians, asked the same question at roughly at the same time as the debate, dedicating a small volume examining not only what, but also how, cultural historians study. Peter Burke, *What is Cultural History?* (Cambridge: Polity Press Ltd., 2004).

3 Alan Knight, "Subalterns, Signifiers, and Statistics: Perspectives on Mexican Historiography" *Latin American Research Review*, Vol. 37, No. 2 (2002), 139.

4 I am particularly indebted to Rob Alegre, Eileen Ford, Bill French, Tracy Goode, Victor Macías, Alejandro Madrid, Maria Muñoz, Gladys McCormick, Gretchen Pierce, Anne Rubenstein, Pamela Voekel, Aurea Toxqui, and Edward Wright-Ríos for their thoughts and suggestions. Any errors, of course, are mine.

5 Knight, "Subalterns, Signifiers, and Statistics," 149–151. Stephen Haber denounced cultural historians' use of the category "space," which he felt "is nothing more than a conceptual catchall—a word to be used whenever nothing else readily comes to mind." Stephen Haber, "Anything Goes," 310, 324.

6 Burke, *What is Cultural History*, 30–73.

7 Maurice Merleau-Ponty, *Phenomenology of Perception*, quoted in Edward Casey, *The Fate of Place* (Berkeley: University of California Press, 1997), 296.

8 Gilderhus underlined the importance of monographs "centered on states and localities, thus demonstrating the magnitude of regional differences and the complexity of shifting factional and class alignments" in having "overturned easy generalizations." Mark T. Gilderhus, "Many

Mexicos: Tradition and Innovation in the Recent Historiography" *Latin American Research Review*, Vol. 22, No. 1 (1987), pp. 204–213.

9   For an excellent example, see Samuel Truett and Elliot Young, eds. *Continental Crossroads: Remapping U.S.-Mexico Borderlands History*. American Encounters/Global Interactions (Duke University Press, 2004).

10 Stephen Haber was not alone in his condemnation of cultural historians' use of "space," as theorists such as Edwards Casey registered similar concerns. The problem with Foucault's terminology, Casey found, is that he uses the concepts "space," "place" "location" and "site" interchangeably. Edward Casey, The *Fate of Place: A Philosophical History* (University of California Press, 1998) 299.

11 Henri Lefebvre, *The Production of Space*, trans. Donald Nicholson-Smith (Oxford: Blackwell Publishers, 1994).

12 Cynthia Radding, *Wandering Peoples: Colonialism, Ethnic Spaces, and Ecological Frontiers in Northwestern Mexico, 1700–1850* (Durham: Duke University Press, 1997); Cynthia Radding, *Landscapes of Power and Identity: Comparative Histories in the Sonoran Desert and the Forests of Amazonia from Colony to Republic* (Durham: Duke University Press, 2005); Donna Guy and Thomas Sheridan, eds. *Contested Ground: Comparative Frontiers on the Northern and Southern Edges of the Spanish Empire* (University of Arizona Press, 1998); Raymond. B. Craib, *Cartographic Mexico: A History of State Fixations and Fugitive Landscapes* (Durham: Duke University Press, 2004); Patrice Elizabeth Olsen, *Artifacts of Revolution: Architecture, Society and Politics in Mexico City, 1920–1940* (Rowman and Littlefield Publishers, Inc., 2008), Thomas Benjamin, *La Revolución: Mexico's Great Revolution as Memory, Myth, & History* (Austin: University of Texas Press, 1999).

13 Ileana Rodríguez' *Transatlantic Topographies: Islands, Highlands, Jungles* Cultural Studies of the Americas, volume 17 (Minneapolis: University of Minnesota Press, 2004).

14 William French, "Imagining and the Cultural History of Nineteenth-Century Mexico" *The Hispanic American Historical Review*, Vol. 79, No. 2, Special Issue: Mexico's New Cultural History: Una Lucha Libre (May, 1999), 249, 265.

15 Ibid., 267.

16 Setha Low, *On the Plaza: The Politics of Public Space and Culture* (Austin: University of Texas Press, 2000); Francine Masiello, "Plazas" *Contracorriente: A Journal of Social History and Literature of Latin America* Vol. 6, No. 3, Spring 2009, 200–218.

17 See for instance, Tanalis Padilla, *Rural Resistance in the Land of Zapata: The Jaramillista Movement and the Myth of the Pax-Priista, 1940–1962* (Duke University Press, 2009).

18 On the cultural impact of railroads, see Michael Matthews, "Railway Culture and the Civilizing Mission in Mexico,1876–1910" (PhD Diss, University of Arizona, 2007) and Rob Alegre, "Contesting the 'Mexican Miracle': Railway men and women struggle for democracy, 1943–1959" (PhD Diss, Rutgers University, 2007), as well as Teresa M. Van Hoy, *A Social History of Mexico's Railroads: Peons, Prisoners, and Priests* (Lanham, Md.: Rowman & Littlefield, 2008). On roads, see Wendy Waters, "Remapping Identities: Road Construction and Nation Building in Postrevolutionary Mexico" in *The Eagle and the Virgin: Nation and Cultural Revolution in Mexico, 1920–1940*, Mary Kay Vaughan and Stephen E. Lewis, eds. (Duke University Press, 2006).

19 Starting with *Mexican Immigration to the United States* (1930) and *The Mexican Immigrant: His Life Story* (1931) by Mexico's first (official) anthropologist Manuel Gamio, anthropologists of both sides of the border have blazed trails in tackling immigration issues. See for instance work by Lynn Stephen, Martha Rees.

20 William H. Beezley and Colin Maclachlan, *El Gran Pueblo: A History of Greater Mexico*. 3rd ed. (Upper Saddle River: Prentice Hall, 2004).

21 Dina Berger, *The Development of Mexico's Tourism Industry: Pyramids by Day, Martinis by Night* (New York: Palgrave Macmillan, 2006); Eric Michael Schantz, "All Night at the Owl: The Social and Political Relations of Mexicali's Red-Light District, 1913–1925" *Journal of*

the Southwest, Vol. 43, 2001; Andrew Grant Wood, ed. *On the Border: Society and Culture between the United States and Mexico* Latin American Silhouettes (SR Books, 2004).

22 For a study of the underworld, see James A. Garza, *The Imagined Underworld: Sex, Crime, and Vice in Porfirian Mexico City* (Lincoln: University of Nebraska Press, 2007).

23 On an excellent graveyard study, see Pamela Voekel, "Piety and Public Space: The Cemetery Campaign in Veracruz, 1789–1810," in *Latin American Popular Culture: An Introduction*, William H. Beezley, Linda Curcio-Nagy, eds. (Lanham, SR Books, 2000).

24 John Locke, *An Essay Concerning Humane Understanding* (London, 1690), 44.

25 Thomas Lacquer, *Making Sex: Body and Gender from the Greeks to Freud* (Harvard University Press, 1992).

26 Burke, *What is Cultural History?*, 70.

27 Knight, "Subalterns, Signifiers, and Statistics," 151.

28 Celeste Gonzales-Bustamante, "Televisiones (tele-visions): The Making of Mexican Television News, 1950–1970" (PhD diss, UA, 2006).

29 Coburn Dukehart, "Mexico City Soundscape" National Public Radio, June 25, 2009. http://www.npr.org/blogs/pictureshow/2009/06/mexico_city_soundtrack.html accessed December 9, 2010.

30 Joy E. Hayes, *Radio Nation: Communication, Popular Culture, and Nationalism in Mexico, 1920–1950* (Tucson: University of Arizona Press, 2000); Eric Zolov, *Refried Elvis: The Rise of the Mexican Counterculture* (University California of Press, 1999).

31 Jeffrey Pilcher, *The Sausage Rebellion: Public Health, Private Enterprise, and Meat in Mexico City, 1890–1917* (Albuquerque: University of New Mexico Press, 2006); Jeffrey Pilcher, *Que vivan los tamales! Food and the Making of Mexican Identity* (Albuquerque: University of New Mexico Press, Author, 1998). For studies on alcohol, see Gretchen Pierce, "Sobering the Revolution: Mexico's Anti-Alcohol Campaigns and the Process of State-Building, 1910–1940" (PhD diss, University of Arizona, 2008) Aurea Toxqui, "'El Recreo de los Amigos': Mexico City's Pulquerias During the Liberal Republic (1856–1911) (PhD diss, University of Arizona, 2007)

32 For recent work on drug use in Mexico, see Isaac Peter Campos-Costero "Marijuana, Madness, and Modernity in Global Mexico, 1545–1920" (PhD Diss, Harvard University, 2006).

33 See, for instance, Rick A. Lopez, "The India Bonita Contest of 1921 and the Ethnicization of Mexican National Culture," *Hispanic American Historical Review* 2002 82(2): 291–328.

34 Anthropologists are leading the field here. See Heather Levi, *The World of Lucha Libre: Secrets, Revelations, and Mexican National Identity* (Durham: Duke University Press, 2008); Roger Magazine, *Golden and Blue Like my Heart: Masculinity, Youth and Power among Soccer Fans in Mexico City* (Tucson: University of Arizona Press, 2007); Jorge Iber and Samuel Regalado, eds. *Mexican Americans and Sports: A Reader in the Athletics and Barrio Life* (Texas A&M University Press, 2007).

35 Judith Butler, *Gender Trouble: Feminism and the Subversion of Identity* (New York: Routledge, 1990).

36 Judith Butler, *Bodies that Matter: On the Discursive Limits of "Sex"* (New York: Routledge, 1993).

37 Space does not permit me to list the vast array of histories of women published in the last decades. As a poor substitute, I refer the reader to some of its most important authors in the bibliography and additional readings.

38 In a review article, Elizabeth Hutchison noted that the "add women and stir" method characterizing early histories of women in Latin America, where women's experiences were merely added to traditional narratives, has increasingly been replaced by histories of gender. Elizabeth Hutchison, "Add Gender and Stir?: Cooking up Gendered Histories of Modern Latin America" *Latin American Research Review*, Vol. 38, No. 1 (2003), pp. 267–287.

39 See in particular Matthew Gutman, *The Meanings of Macho: Being a Man in Mexico City* (Berkeley: University of California Press, 1996) and the anthology *Changing Men and Masculinities in Latin America* (Duke University Press, 2003).

40 Gutmann, *The Meanings of Macho*, 17.

41 Ilene O'Malley, *The Myth of Revolution: Hero Cults and the Institutionalization of the Mexican State, 1920–1940.* Contributions to the Study of World History (Greenwood Press, 1986).

42 For an example of early gendered constructions of race in visual discourse, see Analisa Taylor, "Malinche and Matriarchal Utopia: Gendered Visions of Indigeneity in Mexico" *Signs*, Vol. 31, No. 3, New Feminist Theories of Visual Culture (Spring, 2006), pp. 815–840.

43 Roland Greene, *Unrequited Conquests: Love and Empire in the Colonial Americas* (Chicago: University of Chicago Press, 2000); Pete Sigal, *From Moon Goddesses to Virgins: The Colonization of Yucatecan Maya Sexual Desire* (Austin: University of Texas Press, 2000) and essays in *Infamous Desire: Male Homosexuality in Colonial Latin America* (Chicago: University Of Chicago Press, 2003); Pete Sigal "Gender, Male Homosexuality, and Power in Colonial Yucatán," *Latin American Perspectives*, Vol. 29, No. 2, Gender, Sexuality, and Same-Sex Desire in Latin America (Mar., 2002), pp. 24–40.

44 For an excellent study of male homosexuality in Porfirian Mexico beyond the 41s, see the essay by Victor Macías-González in *On the Border*, Andrew Grant Wood ed.

45 On 41s, see Robert Mckee Irwin, Edward J. McCaughan and Michell Rocio Nasser, eds. *The Famous 41: Sexuality and Social Control in Mexico, 1901* (Palgrave Macmillan: 2003).

46 See Annick Prieur, *Mema's House, Mexico City: On Transvestites, Queens, and Machos*, Worlds of Desire: The Chicago Series on Sexuality, Gender, and Culture (University of Chicago Press, 1998); Héctor Carillo, *The Night is Young: Sexuality in Mexico in the Time of AIDS*, Worlds of Desire: The Chicago Series on Sexuality, Gender, and Culture (University of Chicago Press, 2001), and essays by Daniel Balderston and Robert Mckee Irwin on post-revolutionary literature in *Hispanisms and Homosexuality*, Silvia Molloy and Robert Mckee Irwin, eds. (Durham and London: Duke University Press, 1998).

47 Gabriela Soto Laveaga, *Jungle Laboratories Mexican Peasants, National Projects, and the Making of the Pill* (Durham, Duke University Press, 2009).

48 Pablo Piccato, *City of Suspects: Crime in Mexico City, 1900–1931* (Duke University Press, 2001).

49 William French, "Prostitutes and Guardian Angels: Women, Work, and the Family in Porfirian Mexico", *The Hispanic American Historical Review*, Vol. 72, No. 4 (Nov 1992), pp. 529–553; William French, *A Peaceful and Working People: Manners, Morals, and Class Formation in Northern Mexico* (University of New Mexico Press, 2008).

50 Susan Kellogg, "Encountering People, Creating Texts: Cultural Studies of the Encounter and Beyond*" *Latin American Research Review*, Vol. 38, No. 3 (2003), pp. 261–274.

51 For excellent such examples, see Paul J. Vanderwood, *The Power of God against the Guns of Government: Religious Upheaval in Mexico at the Turn of the Nineteenth century.* Stanford, Calif: Stanford University Press, 1998) and Pamela Voekel, *Alone before God: the Religious Origins of Modernity in Mexico* (Durham: Duke University Press, 2002).

52 Leora Auslander, *Cultural Revolutions: Everyday Life and Politics in Britain, North America, and France* (Berkeley: University of California Press, 2009), 2.

53 Patience Schell, "Conclusion," in Stephanie Mitchell and Patience A. Schell, eds. *The Women's Revolution in Mexico, 1910–1953* (Lanham: Rowland & Middlefield Publishers, Inc., 2007), 205.

54 Schell, 209.

55 Porter, Bliss, Rivera-Garza

56 Thomas Benjamin, *La Revolución: Mexico's Great Revolution as Memory, Myth, & History* (Austin: University of Texas Press, 1999); William H. Beezley, David Lorey, eds. *Viva Mexico! Viva la Independencia!: Celebrations of September 16* (Latin American Silhouettes (SR Books, 2000).

57   Of course, Elena Poniatowska's *La Noche de Tlatelolco* (Mexico: Era, 1971) lent an amazing window into the collective and individual memories of the movement and the events at Tlatelolco early on; new work by Debra Cohen and Lessie Jo Frazier examines gender construction within the student movement. Deborah Cohen and Lessie Jo Frazier, "Mexico '68: Defining the Space of the Movement, Heroic Masculinity in the Prison, and "Women" in the Streets" *Hispanic American Historical Review* 83: 4, November 2003, pp. 617–660.

58   Alan Knight, "Subalterns, Signifiers, and Statistics: Perspectives on Mexican Historiography," *Latin American Research Review*, Vol. 37, No. 2 (2002), 139.

59   Henri Lefebvre, *The Production of Space*, trans. Donald Nicholson-Smith (Oxford: Blackwell Publishers, 1994), 31.

60   Burke demonstrated that "new" cultural history, among other things, was more interdisciplinary in nature, and more ambitious in scope, than its predecessors. For one, the NCH sought an *accercación* with theory and the emerging field of cultural studies in particular. Unlike "historical anthropology" or as Burke more aptly called it, "anthropological history," heavily influenced by the work of Glifford Geertz, the NCH borrowed heavily from more than one discipline and actively sought out theorists from a variety of fields, including postcolonialism, feminism, and literary theory, such as De Certeau, Foucault, Bourdieu, and Bahktin. Burke, *What is Cultural History*, 30–73.

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