

# A BRIEF HISTORY OF MEXICO

## The Classic Period to the Present

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# Table of Contents

## Chapter 1:

### Section 1: The Maya

#### The Maya

<i>Hombres de Maiz</i> .....	1
Ollama.....	1

#### Mayan Civilization

Social Hierarchy .....	1
Mayan Influences on the World Today .....	2
Other Achievement.....	2
The Decline of the Mayans.....	2

### Section 2: The Aztecs

#### The Aztecs

Warrior Spirit .....	3
Tenochtitlàn.....	3

#### Aztec Social Hierarchy

Nobility .....	3
Commoners and Slaves .....	4
Warfare and Education.....	4

#### Aztec Religion

Aztec Religion .....	4
Beliefs and Gods.....	4
Human Sacrifice .....	4

### Section 3: The Conquest

#### The Conquest

Cortès Sets Sail .....	5
Cortès Arrives .....	5

#### Moctezuma II

Moctezuma's Dilemma .....	5
Moctezuma's Decision .....	5

## Rising Tensions

Violence Erupts .....	6
<i>Noche Triste</i> .....	6
Cortès Returns .....	6
Keys to the Conquistador Victory .....	7

## Section 4: Colonial New Spain

### The Beginning of a Colony

Mercantilism .....	8
Bullionism.....	8
The Encomienda System .....	8

### The End of the Encomienda System

Repartimiento.....	8
Haciendas .....	9

### The Catholic Church

Indian Catholicism .....	9
The Virgin of Guadalupe .....	9

### The Society of Colonial New Spain

<i>Peninsulares</i> .....	10
<i>Criollos</i> .....	10
Mestizos .....	10
Indians .....	10
Africans .....	10

## Chapter 2:

### Section 1: Inspiring Revolt

#### Inspiring Revolt

Bourbon Reforms .....	11
The Enlightenment .....	11
The American Revolution .....	11
The French Revolution .....	11
The Haitian Revolution .....	12
Social vs. Political Revolution .....	12

## Section 2: Independence

### Mexican Independence

Father Miguel Hidalgo y Costilla .....	13
Josè Maria Morelos y Pavòn .....	13
Agustìn de Iturbide .....	14
Plan of Iguala .....	14
Impact of Independence .....	14

### Iturbide Takes Power

Iturbide's Issues .....	14
The End of Iturbide's Reign .....	15

## Section 3: Creating a Constitution

### Forming a Republic

Centralism vs. Federalism .....	16
The Constitution of 1824 .....	16
<i>Caudillos</i> .....	16
A Troubled Start .....	16
Santa Anna .....	17

## Section 4: Trouble with the U.S.

### Trouble in Texas

Americans are Invited to Texas .....	18
Tensions Grow .....	18
War on the Texas Frontier .....	18

### The Mexican-American War

War Erupts on the Border .....	19
Battle for Chapultepec Castle .....	19
Treaty of Guadalupe Hidalgo .....	19

## Section 5: The Reform

### A New Era for Mexico

The Reform .....	20
The War of the Reform .....	20

## Section 6: The French Intervention

### Return of Foreign Powers

Battle of Puebla .....	21
French Monarchs Arrive in Mexico .....	21
The Downfall of the French .....	21
Impact of the Intervention .....	22

### The Restored Republic

Issues after the French Intervention .....	22
Juárez Asserts his Authority .....	22
Positivism .....	22
A Mexican First .....	22
Enter Porfirio Díaz .....	23

## Section 7: The Porfiriato

### The Porfiriato

Order, Progress, & the <i>Científicos</i> .....	24
Foreign Investment in Mexico .....	24
Some Positives of the Porfiriato .....	24

### The Downfall of Díaz

Rich get richer, poor get poorer .....	25
<i>Pan o Palo</i> .....	25

## Chapter 3:

## Section 1: The Mexican Revolution

### Seeds of Revolution

Francisco Madero and the <i>Guerrilleros</i> .....	26
The Battle of Ciudad Juárez .....	26
Fiesta of Bullets .....	26
Impact of the Revolution .....	27

### Constitution of 1917

Article 27 .....	27
Article 123 .....	27

### Constructive Phase of the Revolution

The Sonoran Triangle .....	28
----------------------------	----

## Section 2: Social and Economic Change

### A New President Takes Office

Changing Mexican Society .....	29
PEMEX – “The Oil is Ours” .....	29

### Economic Development in Mexico

World War II .....	29
The Mexican Miracle .....	30
<i>Maquiladoras</i> .....	30
Americanization.....	30

## Section 3: The PRI

### Party Dominance

The Partido Revolucionario Institucional (PRI) .....	31
The PRI Begins to Lose Power .....	31

## Section 4: NAFTA

### A Pact Between Neighbors

The Impact of NAFTA.....	32
--------------------------	----

## Section 5: U.S.-Mexican Relations

### Immigration

Push and Pull .....	33
Winners and Losers in Illegal Immigration .....	33

### Narco-Trafficking

Supply and Demand.....	34
Impact of Narco-Trafficking .....	34

# Section 1: The Maya

## HELPFUL HINTS



Key Terms



Key Individuals



Valuable Information

## Chapter

# 1

## The Maya

The history of Mexico could not be told, nor could Mexican politics today be properly interpreted without studying its extremely important **indigenous** past. And although many indigenous tribes called present-day Mexico home, (in fact nearly twenty million Native Americans lived in an area historians refer to as **Mesoamerica**) few, if any, rivaled the dominance of the Mayan Empire between the years of 250-900 A.D. This time period of Mayan dominance was known as the **Classic Period**.<sup>1</sup> The Mayan empire was massive with cities dotting the Mexican landscape. Each city was interconnected by trade routes. Mayan cities were quite a site to see with their palaces, pyramids, temples, canals, plazas, and even ball courts.<sup>2</sup>

### *Hombres de Maiz*

The Mayans farmed the Mexican soil and raised many crops such as beans, squash, and **maize**. Maize, however, was the most important crop to the Mayan people. According to the Mayan myth, the **Popol Vuh** (think of it as the Mayan version of the Adam and Eve story), three plumed water serpents created mankind (a plume is a long, soft feather). In their first attempt to make humans, the serpents used mud, but the humans could neither move nor speak. Next, the serpents tried to make humans using wood, but the humans had no soul or blood. Finally, the serpents decided to use maize, resulting in the creation of the Maya people.

Clearly, one can see just how strong of an attachment the Mayans had to maize and why it was so important to their culture. Like many Mesoamerican tribes, the Mayans were *hombres de maiz*, or the people of corn.<sup>3</sup>

### *Ollama*

The ancient Mayans also enjoyed recreational activities and even played sports. However, the Mayans did not play any sports that would be familiar today. Instead, the Mayans played **ollama**. The game was played on a court that was shaped like the letter “I.” Along each of the long sides of the court was a wall with a stone ring. The rings varied in size from 10 cm to 50 cm.<sup>4</sup> Two teams played at a time. The object of the game was to keep the seven-to-eight-inch solid rubber ball away from the other team, and, if possible, get the ball through one of the rings. Scoring was extremely challenging.

More than a game, *ollama* was considered sacred. It was a ritual designed to symbolize the movement of the planets and stars. The game was taken very seriously and large amounts of money were wagered on what team would be victorious. The losing captain was sometimes sacrificed or the losing team became the slaves of the winners.<sup>5</sup>

## Mayan Civilization

### *Social Hierarchy*

At the very top of the Mayan social hierarchy was the upper class, or the **nobility**.<sup>6</sup> The most important member of the nobility was the king as the Mayans believed their king was related to the gods. Under the king was the rest of the nobility which included high priests, rich merchants, and noble warriors. This was the group that held the power in Mayan society. The nobility

## Section 1: The Maya

lived in palaces located in the cities. They had access to many of the empire's luxuries like ball courts and steam baths.<sup>7</sup>

There was a very small Mayan middle class. This group consisted of artisans who produced crafts, low-level officials, and small merchants. This group lived outside the center of the city in something like apartment complexes today.<sup>8</sup>

At the very bottom of the social hierarchy was the lower class. This group was composed of laborers and farmers. The lower class lived furthest from the center of the city in thatched-roof huts. They farmed, hunted, and fished.<sup>9</sup>

The middle and the lower classes had to pay tribute to the upper class. These people were responsible for producing luxury items for the nobility as well as the food for the entire society.<sup>10</sup>

The lower classes also served as the empire's labor force and as soldiers in time of war. Mayan society, for the most part, was a fixed society, which meant that one could not move up or down a social class.<sup>11</sup>

### Religion

Mayan religion was based around the belief that gods, people, animals, plants, mountains, and even cities were alive. The Mayans believed that the movement of these things could be timed, and thus they became very knowledgeable in both mathematics and astronomy. Using these skills, the Mayans created an extremely accurate calendar.<sup>12</sup>

The Maya also believed that human events were predetermined by their gods<sup>13</sup> and practiced sacred rituals to appease gods like the creator god, sun god, moon god, and maize god. Since the Mayans "believed that blood was life," many of their rituals involved the use of human or animal blood.<sup>14</sup> Thus, the Mayans did practice human sacrifice. Warfare was important as captured warriors were often the ones sacrificed.<sup>15</sup>

### Mayan Influences on the World Today

The Maya invented a number of things still used to this very day. The Mayans created a calendar that contained 365 days. Today, their

calendar is off by less than a minute.<sup>16</sup> The Mayan calendar was used to regulate rituals and to help the Mayans avoid disasters and enjoy periods of prosperity and wealth.<sup>17</sup> They also created a number system based on the concept of zero and even recorded their history with dates.<sup>18</sup>

### The Decline of the Mayans

The reign of the Maya did not last forever. Their empire weakened around 900 A.D. Historians are not really sure why the Mayan empire declined, but there are several theories. Some argue there was too much of a strain on the lower class while other historians suggest warfare, famine, drought, and plague.<sup>19</sup> There is even a theory that a massive hurricane hit Mexico which could have weakened the Maya empire and brought about its decline.<sup>20</sup>

### Section 1 Review:


1. Define the following terms: indigenous, Mesoamerica, Classic Period, maize, *ollama*, nobility, merchants, tribute, fixed society, predetermined.
2. Explain the importance of maize to the Mayan culture.
3. Draw a pyramid representing the Mayan social classes and the kinds of people belonging to each class.
4. What aspects of Mayan culture are still intact today?
5. List the possible reasons for the decline of the Mayan empire.




## Section 2: The Aztecs

### HELPFUL HINTS

 Key Terms

 Key Individuals

 Valuable Information

## The Aztecs

The Aztecs were a **nomadic** tribe and one of the last tribes to migrate into Mexico.<sup>21</sup> Along their long migration from what would either be present day Oklahoma or Texas,<sup>22</sup> the Aztecs began to believe that they were the chosen people of the gods.<sup>23</sup> They dominated Mexico from the 13<sup>th</sup> to the 16<sup>th</sup> centuries.

### Warrior Spirit

Upon their arrival in Mexico, the Aztecs developed a reputation as excellent warriors.<sup>24</sup> Though the Aztecs were admired for their bravery by other tribes, they were also hated for their cruelty. Despite their cruel reputation, some tribes recognized the value of the Aztec warrior spirit and began to hire them as **mercenaries**.<sup>25</sup>

Legend has it that a leader from another tribe, whose name was Coxcox (meaning pheasant), hired the Aztecs as mercenaries to fight against his enemies. The Aztecs crushed Coxcox's rivals and presented Coxcox with a gift of 8,000 ears sliced from the heads of his enemies. In return, the Aztecs asked for Coxcox's daughter, Culhùà, who would be made the Aztec queen and treated like a goddess. However, the Aztecs sacrificed Culhùà to the gods. Coxcox was outraged and raised an army against his former allies and scattered the Aztecs.<sup>26</sup>

### Tenochtitlàn

After being scattered by Coxcox, the Aztecs eventually settled along the shores of **Lake Texcoco**. This location was chosen by the Aztecs because a sacred omen appeared to them when an eagle perched on a cactus carrying a serpent in its beak. (This image became the Mexican coat of arms and now appears on the Mexican flag). This

## Chapter

# 1

place of Aztec settlement became known as **Tenochtitlàn**.<sup>27</sup>

No one bothered the Aztecs on this piece of land because most Mesoamericans did not think it was a good place to live. As luck would have it, the lake turned out to be full of waterfowl and fish. It was also located at an intersection where three kingdoms met.<sup>28</sup>

Over the years, Tenochtitlàn would grow to include between 150,000-200,000 residents, making it one of the largest cities in the world by the year 1502.<sup>29</sup> It was a very clean city with a drainage system, and the garbage was collected and hauled away on barges. A group of a 1,000 men cleaned the streets daily. Residents of Tenochtitlàn even bathed more than once a day. Thus, the Aztec people were a "healthy" tribe.<sup>30</sup>

Eventually the Aztec empire would grow beyond Tenochtitlàn, through both warfare and trade, to include hundreds of **city-states** that were interconnected, and all of which paid tribute to the Aztecs.<sup>31</sup>

## Aztec Social Hierarchy

### Nobility

At the top of the Aztec social hierarchy was the emperor and the royal family, as well as high priests, military officials, judges, and tax collectors. The emperor could have many wives. For example, legend has it that the emperor Nezahualpilli had 2,000 wives. However, each Emperor had one principal or "legitimate" wife. The Emperor and royal family served as examples for the other Aztecs and perhaps most importantly, the royal family led the Aztec warriors. It was extremely important that the nobility maintained

## Section 2: The Aztecs

dignity and thus, unlike most monarchies, the Aztecs did not follow the common tradition that the eldest son of the emperor became the ruler after the emperor's death.<sup>32</sup>

Just below the nobility was a group of Aztecs that achieved high status in the social order but were not quite nobility. This group included merchants, priests, scholars, artists and scribes.<sup>33</sup>

### Commoners and Slaves

The largest class of Aztec society were the commoners which accounted for roughly 90% of the population. Commoners were farmers, laborers, craftsmen, servants, and vendors.<sup>34</sup>

At the very bottom of Aztec society were the slaves. Slaves did have some basic rights and slavery was not hereditary. Slaves could even marry a free person. Some gamblers even bet their freedom on a game.<sup>35</sup>

### Warfare and Education

Every male in Aztec society was expected to take up arms in times of war. Unlike the Mayan society which was a fixed society, the Aztecs had social mobility based on performance in battle. The ultimate goal of every Aztec warrior was to become a member of the elite Eagle or Jaguar Knights.<sup>36</sup>

Both Aztec boys and Aztec girls received an education. Boys learned the art of war and girls learned how to take care of the home and to be good mothers.

## Aztec Religion

### Beliefs and gods

Like the Maya, the Aztecs worshipped many gods. These gods included the likes of Tlalo, Tezcatlipoca, and Quetzalcòatl (the most common god in Mesoamerica). However, the main god for the Aztecs was Huitzilopochtli.<sup>37</sup> Huitzilopochtli (Hummingbird on the Left) was the god of war and the sun. According to the Aztecs, after his sister had killed their mother,

Huitzilopochtli in turn killed his sister and then ate his mother's heart.<sup>38</sup>

The Aztecs believed that the sun and earth had been destroyed and recreated four times, and that they were currently living in the age of the fifth sun. Based on this belief, they felt that the destruction of the earth and sun in their own time was looming. Obviously, they wanted to avoid the end of the world for as long as possible, and the Aztecs believed that showing respect to Huitzilopochtli would help prevent the end of their world.<sup>39</sup>

### Human Sacrifice

The Aztecs understood their world in terms of the natural cycle. They witnessed the rain and the sun feeding plants and animals. Because the sun and the rain were key to Aztec survival, it only made sense that the Aztecs re-pay the gods with something in return.<sup>40</sup> The Aztecs believed that the ones they sacrificed nourished the gods.<sup>41</sup> This was why human sacrifice became so important to the Aztecs. In the past, the gods had sacrificed themselves to the sun. Now, it was the Aztecs time to sacrifice for the gods. No sacrifice could be greater than the giving of life itself. The need for blood also went hand-in-hand with Aztec military expansion since captives were often the ones being sacrificed.<sup>42</sup>

For the Aztecs, human sacrifice was a religious ceremony that was practiced in the hopes of avoiding disaster. "Victims were sent as messengers to the gods to demonstrate the [admiration] of the people, and it was often considered an honor to make the trip."<sup>43</sup> There were many ways that the Aztecs sacrificed their victims, but the most common was by the excision (cutting out) of the heart usually followed by decapitation.<sup>44</sup>

### Section 2 Review:

1. Define the following terms: nomadic, mercenaries, city-state, hereditary, Huitzilopochtli.
2. Compare and contrast the Mayan social classes with the Aztec social classes.
3. Why were the Aztecs considered a "healthy" tribe?
4. Explain the importance of human sacrifice to the Aztec culture.

## Section 3: The Conquest

### HELPFUL HINTS



Key Terms



Key Individuals



Valuable Information

## Chapter

# 1

## The Conquest

The Aztec empire, like all empires, eventually came to an end. Unlike the Mayan Classic Period where historians are still debating several theories of Mayan decline, historians can point to the single event that was the beginning of the end for the Aztecs—the arrival of **Fernando Cortès** and the **conquistadors** from Spain.

### Cortès Sets Sail

On **February 18, 1519** Cortès left from Cuba on an expedition that would change history. Sailing 11 ships, Cortès commanded roughly 550 men who were ready to find wealth and adventure. Accompanying the men were 16 horses and a few small cannons.<sup>45</sup> The conquistadors sought power and wealth and were not entirely of Spanish **ethnicity**. Cortès' force contained soldiers and sailors from Portugal, Germany, and Italy.<sup>46</sup>

### Cortès Arrives

Upon arrival, Cortès had some early conflicts with the indigenous tribes. He lost some men in these early battles, but he killed over 200 Native Americans. Soon the rumor was spreading that Cortès and his men were invincible.<sup>47</sup> The Spaniards had guns and gunpowder, horses, and huge dogs—things the indigenous tribes had never seen before.

Cortès obtained one more advantage over the natives. Upon arrival, he made contact with **Jerónimo de Aguilar**, who had shipwrecked on the Mexican beaches in 1511. Aguilar spoke both

Mayan and Spanish. Cortès was also given a woman as a gift from one of his victories. This woman was converted to Catholicism and was baptized **Doña Marina**. (She was called **Malinche** by the Indians as they considered her a traitor). She served as both interpreter and advisor to Cortès. She would communicate with the natives and pass the message to Aguilar who would pass it to Cortès.<sup>48</sup>

## Moctezuma II

**Moctezuma II** was the emperor of the Aztecs at the time of Cortès' arrival to Mexico. He faced the difficult decision of how to deal with these strangers.

### Moctezuma's Dilemma

Moctezuma was confused and fearful as to the best way to treat the conquistadors. They appeared to be some kind of invincible gods. Hearing of Cortès' arrival, Moctezuma first sent gifts to Cortès and then asked him to leave.<sup>49</sup> After Cortès ignored this request, Moctezuma had his magicians and warlocks send evil winds in the direction of the conquistadors. He called for the Aztecs to offer more human sacrifices. When all his efforts failed to stop Cortès, he ordered his people to give the Spanish whatever they wanted. However, Moctezuma had still not ruled out using his warriors against the conquistadors.<sup>50</sup>

### Moctezuma's Decision

In the end, Moctezuma decided to meet Cortès and invited him to Tenochtitlán.<sup>51</sup> The conquistadors were fortune hunters and had come to Mexico in the hopes of finding the mythical city

## Section 3: The Conquest

of gold, **El Dorado**. Upon meeting the Aztec ruler, Cortès told Moctezuma that the conquistadors suffered from “disease of the heart that [could] only be cured with gold.”<sup>52</sup> (The Spaniards never found the mythical golden city).<sup>53</sup>

Moctezuma made the conquistadors special guests and allowed them to freely walk the streets of Tenochtitlàn. The conquistadors enjoyed the Aztec palaces and the zoo, but were disgusted by the rack covered with human skulls.<sup>54</sup> Despite the fact that Moctezuma allowed the conquistadors to roam the city at their leisure, Cortès realized that they were indeed trapped if Moctezuma decided to use violence. Thus, Cortès made a bold decision—he seized Moctezuma as a hostage.

Moctezuma told the Aztec people that he was staying with the Spanish because it was the gods’ will and not because he was the conquistadors’ prisoner. The Aztecs tolerated the conquistadors and their lies for a time, but after about six months, the Aztecs had enough of the conquistadors and begin to talk of attacking Cortès and his men.<sup>55</sup>

### Rising Tensions

#### Violence Erupts

As tension was mounting between the conquistadors and the Aztecs, Cortès was forced to leave Tenochtitlàn to deal with a Spanish rival, Pánfilo de Narváez, who had just arrived on Mexican soil. Cortès left **Pedro de Alvarado** in charge of a small group of troops in the Aztec capital. While Cortès was away, the Aztecs held a festival. Alvarado got nervous and thought this festival was a threat to the conquistadors. He ordered his troops to attack and some of the Aztecs best warriors were killed.<sup>56</sup>

The conquistadors and the Aztecs were now at war. Hearing of the attack and after persuading Narváez’s men to join his army, Cortès hurried back to Tenochtitlàn. The Aztecs allowed Cortès and his men to re-enter the city. This was all part of their plan to trap Cortès and his men inside of Tenochtitlàn. The conquistadors preferred to do battle in open space where they

could better use their guns and horses more effectively. Now, they were penned in and forced to fight in the streets as the Aztecs hid behind buildings. Cortès asked Moctezuma to get the Aztecs to stop the attack. Moctezuma climbed the rooftops to speak to his fellow Aztecs, but they would not listen. Three days later, Moctezuma was killed. (The story that appears most about Moctezuma’s death was that he was stoned by his own people. Other historians argue that Cortès had him killed).<sup>57</sup>

#### Noche Triste

Cortès realized he must leave the city, but the Aztecs destroyed all of the bridges and cut off their escape. The conquistadors built a portable bridge and divided the treasure they had stolen from the Aztecs. Their plan was to sneak out at night. Stealth was so important that the conquistadors even wrapped their horses’ hooves in cloth so they wouldn’t make any noise. They made their move on July 1, 1520, the **Noche Triste**, or “Night of Sorrow.” An old Aztec woman gathering water spotted the Spanish as they attempted their escape and sounded the alarm. Aztec warriors came running and Cortès placed Alvarado in charge of the rear guard to help cover the escape. The Spanish got across the first channel, but their bridge broke while passing the second channel and Cortès and others were forced to swim to safety. As Cortès reached shore he assessed the damage of his escape. He had lost 450 men, 4,000 Native American **allies**, and 46 horses. (Remember, Cortès’ fighting force had grown since his arrival after Narváez’s men had joined his army). It was said that Cortès was so upset by the disaster he sat under a tree and cried—hence the name “Night of Sorrow.”<sup>58</sup>

#### Cortès Returns

Cortès would eventually regroup and returned with tens of thousands of indigenous allies who were tired of the Aztecs cruel reign. Cortès used his new allies and laid **siege** to Tenochtitlàn. He captured it in **1521**. The Spanish leveled the city and built on its ruins **Ciudad de Mexico** or Mexico City.<sup>59</sup>

## Section 3: The Conquest

### Keys to the Conquistador Victory

Even though the Aztecs greatly outnumbered Cortès and his conquistadors, the Spanish were able to conquer the Aztec empire in a rather short amount of time because they held several advantages over the Aztecs. First, the Spanish had superior military technology. Their guns, cannons, and armor were no match for the Aztecs. A **mounted** soldier and early firearms were frightening images for the Aztecs who had never seen a gun or a horse.

Second, because the Aztecs were hated by the other indigenous tribes for their cruelty, Cortès was able to recruit an estimated 200,000 indigenous allies to help fight against the Aztecs. The other tribes were simply tired of Aztec dominance.

Timing also played a role in the Aztecs' defeat. According to Aztec legend, the god Quetzalcoatl was scheduled to return in the year 1519. This was the exact year in which Cortès landed in Mexico. Because the conquistadors looked like nothing the Aztecs had ever seen before, Moctezuma may have believed that Cortès was the god Quetzalcoatl.

The Spanish also unknowingly brought with them an invisible and deadly killer—**smallpox** against which the Aztecs had no immunity.<sup>60</sup> This disease devastated an otherwise healthy Aztec population.

Finally, the different tactics used by the conquistadors and the Aztecs had a significant impact on why the Aztecs fought unsuccessfully. Because the Aztecs believed so firmly in human sacrifice, they preferred to capture their enemies alive so that they could be sacrificed to appease the gods. The conquistadors, on the other hand, merely killed their enemies.<sup>61</sup>

4. Explain the events leading up to *Noche Triste* and what happened on July 1, 1520.
5. List the reasons the conquistadors were able to defeat the Aztecs.




### Section 3 Review:

1. Define the following terms: conquistadors, ethnicity, El Dorado, *Noche Triste*, allies, siege, mounted, smallpox.
2. What were the conquistadors after? Did they find it?
3. What was Moctezuma's dilemma? What did he decide to do?



## Section 4: Colonial New Spain

### HELPFUL HINTS

	Key Terms
	Key Individuals
	Valuable Information

## Chapter

# 1

## The Beginning of a Colony

### Mercantilism

Under the system of **mercantilism**, a colony existed to help the mother country become a stronger and a more self-sufficient nation. New Spain, as a colony of Spain after the conquest, now existed to benefit its mother country—Spain. New Spain supplied raw materials to Spain, and then Spain produced finished goods from those raw materials. Spain then sold the finished goods back to New Spain at a profit.<sup>62</sup> The Spanish monarchs were very strict in enforcing the mercantilist system.

### Bullionism

The Spanish also believed in bullionism, or that true wealth consisted of precious metals like gold and silver. The conquistadors came to Mexico in the hopes of finding gold, but instead found more wealth in Mexican silver mines.<sup>63</sup>

### The Encomienda System

Cortès and the conquistadors had set out chasing the myth of the legendary El Dorado. When they did not find El Dorado, nor as much gold as they had anticipated, they had to look for a new “treasure” in order to gain the wealth they all desperately desired.

The **encomienda** was a labor grant in which **encomenderos** (conquistadors and their offspring)<sup>64</sup> were given control over an indigenous

community.<sup>65</sup> The encomendero received tribute and free labor from the Native Americans under his control. In exchange, the encomendero was to care for the natives by converting them to Christianity and generally providing for the safety and overall well-being of the indigenous people.

In theory, the encomienda system was designed to convert, control, and protect the indigenous tribes. In practice, the natives were overworked, cheated, physically abused, and separated from their families. Generally speaking, the encomienda system **demeaned** the Native Americans and created many of the economic and social problems that are still seen in Mexico to this very day.<sup>66</sup>

## The End of the Encomienda System

### Repartimiento

By the 1550s, the encomienda system was on the decline and the Spanish monarchs were displeased with how the system was operating. Spain also **abolished** Native American slavery. A key ingredient to the mercantilist system was that the colony provided labor. With the encomienda system failing, and with slavery abolished, Spain now needed a new way to get labor from its colony. Thus, Spain created **repartimiento**, which was a system of forced labor in which adult Native American males contributed around 45 days of labor a year. The 45 days were spread out throughout the year and workers usually worked in weekly intervals.<sup>67</sup> The natives were supposed to be paid and treated well. However, they were

## Section 4: Colonial New Spain

abused, worked long hours, and often never received their pay.<sup>68</sup>

### Haciendas

*Repartimiento* was not the only thing replacing the *encomienda* system. Soon, some in Mexico created large **haciendas**. These were massive individually owned agricultural estates.<sup>69</sup> These haciendas grew corn and wheat and also raised cattle and sheep. Some cattle herds grew to include over 150,000 cows and some sheep herds were as large as 2 million. One man's hacienda grew to the size of 11,626,850 acres!

Owners of these massive haciendas sometimes obtained land by purchasing it from the indigenous tribes. However, hacienda owners also cheated and used force to gain Native American lands. Despite some hostility between hacienda owners and local native villages, the two managed to coexist in a “synergy that allowed Spaniards to profit modestly...and Indian villages to preserve some [of their independence] and land.”<sup>70</sup>

### The Catholic Church

The **Roman Catholic Church** in New Spain was much more than a religious institution. The Church allowed Spain to justify the conquest because Spain believed it was saving souls.<sup>71</sup> The Church was very important in molding the colony of New Spain. It attempted to bring Spanish culture and values to the indigenous people. Furthermore, Spain wanted to convert all natives to Christianity. Spain's mission was to defend the Catholic faith and spread it to the New World.<sup>72</sup> It did not take long for Spanish monasteries to spread across all regions of New Spain.<sup>73</sup>

But the Church did so much more than merely hold mass and convert the natives. The monasteries educated the native tribes with both spiritual and political teachings and even taught the Indians that they had some rights. Monasteries also served as an area where goods were exchanged.<sup>74</sup> The Spaniards who made the long journey from Europe felt the Church was a link to

Spain.<sup>75</sup> With so few banks in New Spain, the Church also served as a place to get loans.<sup>76</sup>

### Indian Catholicism

As the indigenous tribes were converted to Catholicism, they blended their old beliefs with those of Christianity. The natives kept alive their values of family, community, and both the agricultural and life cycles.<sup>77</sup> The Church had to allow the natives to merge some of their old beliefs with those of Christianity or Spain would have found it very difficult to convert the Native Americans. One of the best examples of Indian Catholicism is the Virgin of Guadalupe.

### The Virgin of Guadalupe

On December 9, 1531 the **Virgin of Guadalupe** appeared to **Juan Diego** at Tepeyac Hill not far from Mexico City. Not only did Juan see her as the Virgin Mary, but she even spoke to him in Nāhuatl, the language of the Aztecs. Guadalupe told Juan that she wanted the bishop to build a shrine on Tepeyac Hill so she could give grace to all in need. When Juan told the bishop of his visit from Guadalupe, the bishop did not believe Juan and asked for proof that she had actually appeared.

A few days later, on December 12, Guadalupe once again appeared to Juan (**December 12 is now celebrated as *día de Guadalupe* in Mexico**). She told Juan to go to the hill where they had first met. Juan returned to Tepeyac Hill and found a blooming rose bush—an odd thing to find in the middle of winter. He gathered the roses, wrapped them in his cloak, and took them to the bishop. As Juan unwrapped the roses from his cloak to show the bishop, they fell to the floor and left an image of Guadalupe imprinted on the cloth.

Juan Diego became Mexico's first saint in 2002 and the Virgin of Guadalupe became the patron saint of Mexico. In fact, she is so important that the novelist Carlos Fuentes once stated, “One may no longer consider himself a Christian, but one cannot truly be considered a Mexican unless one believes in the Virgin of Guadalupe.”<sup>78</sup>

## Section 4: Colonial New Spain

### The Society of Colonial New Spain

The conquistadors did not arrive in Mexico as colonists but as fortune hunters and adventurers. Since the conquistadors were not colonists, they left their wives and children at home and traveled to the New World free from **domestic** life. Thus, from their arrival in Mexico, Spaniards mixed freely with the female natives. This racial mixing was referred to as **mestizaje**. There were three basic ethnic groups in New Spain: Spanish, Indian, and African. And then of course there was the mixing of these groups.<sup>79</sup>

#### Peninsulares

**Peninsulares** were born in the country of Spain. These individuals held the highest government jobs. They also controlled the silver mines, were merchants, and were wealthy land owners.<sup>80</sup> *Peninsulares* were the most powerful group in New Spain.

#### Criollos

**Criollos** were entirely of Spanish blood but they were born in the colony of Mexico. *Criollos* looked like *peninsulares*, but because they were born in the New World they had a lower status in society and suffered from “geographic racism.”<sup>81</sup> Despite being a step below the *peninsulares*, *criollos* did control some positions in the royal government, Church, and military. They also owned haciendas, mines, and some became merchants.<sup>82</sup>

#### Mestizos

**Mestizos** were the result of *mestizaje* and comprised the majority of the population of New Spain.<sup>83</sup> Most commonly *mestizos* were of Spanish-Indian parentage.<sup>84</sup> Because of their mixed ancestry, most could not move to a higher position in society. *Mestizos* found work

as servants, artisans, entrepreneurs, traders, and laborers.<sup>85</sup>

#### Indians

The Indians, or Native Americans, were considered inferior by the Spaniards. The Spaniards called them **Gente sin razón**, or people without reason.

The Spaniards described the Indians as lazy and untrustworthy. The colony greatly depended on Indian labor and so the natives were forced to serve the needs of the Spanish.<sup>86</sup>

#### Africans

African slaves were also found in the colony of New Spain. The Spanish considered African slaves more trustworthy and reliable than the Indians. However, African slaves were expensive as they had to be purchased and brought over from Africa. Because there was a fear of slave rebellion, strict regulations were placed on Africans in New Spain. They could not have firearms, could not be out past a certain hour, and could not gather in groups larger than three while in public.<sup>87</sup>

### Section 4 Review:


1. Define the following terms: mercantilism, encomienda, encomendero, demean, abolish, *repartimiento*, hacienda, domestic, *mestizaje*, *peninsulare*, *criollo*, *mestizo*, *gente sin razón*.
2. Explain how the encomienda system was supposed to work. Why didn't it work this way? What replaced this system of work? How was it different from the encomienda system?
3. What roles did the Catholic Church play in New Spain? Why do you think the Virgin of Guadalupe is important to Mexicans even to this very day?
4. Your social class in New Spain was based on what two things?




# Section 1: Inspiring Revolt

## HELPFUL HINTS

 Key Terms

 Key Individuals

 Valuable Information

## Chapter

# 2

## Inspiring Revolt

Over time, the people of New Spain began to have more and more issues with their mother country. At home in Europe, Spain had its own problems when the Hapsburg royal family was replaced by the Bourbons. A new royal family was now in charge of Spain and its colonies which impacted New Spain. Those living in New Spain were also greatly impacted by the ideals of the Enlightenment. Close by, the people of New Spain witnessed several other colonies gaining their independence and were thus inspired to break away from Spain.

### Bourbon Reforms

The new royal family of Spain, the Bourbons, wanted to reaffirm the mercantilist system in New Spain to ensure the colony was supporting the mother country. Thus, in the 1780s, the Crown instituted the Bourbon Reforms. The system was designed to maximize profits, ensure the colony of New Spain was purchasing Spanish goods, and created a tax that would be collected by the *peninsulares*.

These new reforms upset the *criollos*. Though they were able to obtain high paying military positions under this new system, they were forced to pay higher taxes and were also being removed from the top government jobs. The *criollos* believed that they were the “true” Mexicans. They had a link to both the conquistadors as their descendants and the Aztecs because they were born in New Spain. Mexicans developed a sense that Mexico was different not only from Spain but also different from the rest of its neighboring colonies in the region.<sup>88</sup> *Criollos* started celebrating their native culture or their mexicanidad. They no

longer called themselves *criollos*, but instead preferred to be called mexicanos.<sup>89</sup> Furthermore, The Virgin of Guadalupe helped unify the *criollos*, *mestizos*, and Indians—she was unique to Mexico.<sup>90</sup>

### The Enlightenment

The Enlightenment was an age of reason and science. One of the greatest Enlightenment thinkers was John Locke. He wrote that government exists to protect life, liberty, and property. *Criollos* and others wanted these natural rights in Mexico.

### The American Revolution

Just to the north of Mexico, a group of colonies fought for independence starting in the 1770s. The members of the 13 Colonies banded together to revolt against King George III of Great Britain. Amazingly enough, the colonists won and were able to achieve independence. The American Revolution became a model for all the Latin American countries. The American colonists attacked the mercantilist system and created a nation on the basis of Locke’s values of “life, liberty, and the pursuit of happiness.”

### The French Revolution

Not long after the American Revolution concluded, the people of France revolted against their king. The French people over-threw (and decapitated) King Louis XVI and his wife Marie Antoinette. Once again, this revolution reinforced the values of liberty and equality to the Mexican people.<sup>91</sup>

## Section 1: Inspiring Revolt

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### The Haitian Revolution

The French Revolution inspired the small Caribbean island of Haiti to revolt. The Haitian Revolution was a bit different, as it was a slave revolt in which non-whites sought their freedom. Though the Haitian Revolution provided another example of a successful rebellion for Mexico, it served more as a warning for *criollos* as the last thing they wanted after independence was for the lower, non-white classes to gain any political power.<sup>92</sup>

### Social vs. Political Revolution

The *criollos* recognized and accepted that bloodshed and loss of life would result from their decision to rebel against Spain. The *criollos* did not fear this type of destruction as long as their revolution left their social hierarchy in-tact.<sup>93</sup> *Criollos* wanted to remain in power after independence. They did not want the lower classes—the *mestizos*, Indians, and Africans—to gain any political power.

### Section 1 Review:

1. Define the following terms: Bourbon Reforms, *mexicanidad*, *mexicanos*.
2. Why did those living in New Spain resent the Bourbon Reforms?
3. Was the French Revolution a social or political revolution? Could it be both a social and political revolution? Explain.

## Section 2: Independence

### HELPFUL HINTS



Key Terms



Key Individuals



Valuable Information

## Chapter

# 2

## Mexican Independence

With revolutionary movements sweeping around the globe, and with the successes of both the Americans and Haitians defeating world powers greater than Spain,<sup>94</sup> it was only a matter of time before the Mexicans caught the revolutionary spirit and began the process of overthrowing the **tyranny** of Spain. In the process to overthrow Spanish rule, several key revolutionary leaders emerged to lead Mexico towards its independence.

### Father Miguel Hidalgo y Costilla

Father Hidalgo was a *criollo* but was not a typical priest as he was a known gambler and even had three children with two different women. Despite his flaws as a priest, he was remembered as the father of the movement that pushed Mexico towards independence.<sup>95</sup>

Early on September 16, 1810, Father Hidalgo rang the town's church bells to call the people to mass. He was about to be arrested as a **conspirator** against the crown. As the people assembled he gave his famous speech, **the grito de Dolores**, or Cry of Dolores. This speech started the conflict that eventually freed Mexico from Spain.<sup>96</sup> Below is a small portion of *the grito de Dolores*:

“My children: a new dispensation comes to us today. Will you receive it? Will you free yourselves? Will you recover the lands stolen three hundred years ago from your forefathers by the hated Spaniards? We must act at once....Will you not

defend your religion and your rights as true patriots? Long live our Lady of Guadalupe! Death to bad government! Death to the [Peninsulares]!”<sup>97</sup>

Hidalgo gained further support for the rebellion by choosing the Virgin of Guadalupe as a symbol for the cause. She became a unifying force for the Mexican people.

Unfortunately, Hidalgo had no military training and was not able to control his army and his rebellion lost momentum.<sup>98</sup> He was captured and found guilty of **treason**. He was executed in front of a firing squad. He was decapitated and his head was placed on a pole and displayed publicly as a warning to other independence fighters.<sup>99</sup>

### Josè María Morelos y Pavón

Josè Morelos replaced Hidalgo as the leader of the revolution. Unlike Hidalgo, Morelos was a *mestizo*. And also unlike Hidalgo, Morelos was a brilliant military leader who used **guerrilla** tactics to win several key victories towards Mexican independence.<sup>100</sup>

Because Morelos was a *mestizo* and brought the lower classes into the revolution, the *peninsulares* and *criollos* became afraid of mob violence (social revolution) and preferred Spanish rule to Morelos' rebellion. The *peninsulares* and *criollos* preferred a king rather than lose their power in Mexico. Soon the *criollos* and *peninsulares* had hunted down Morelos. They placed him in front of the firing squad and executed him. He too was decapitated and his head was placed on the same wall as Hidalgo's.<sup>101</sup>

## Section 2: Independence

### Agustín de Iturbide

One of the people ordered to hunt down Morelos was Agustín de Iturbide.<sup>102</sup> For a decade, he had fought *against* the rebels on the side of the Spanish king.<sup>103</sup> However, Iturbide eventually got removed from his command because he was a cruel leader. This caused tension between Iturbide and his commanding officer and Iturbide wanted revenge for being removed from his command.

Iturbide met with Vicente Guerrero, the new leader of the rebellion and Iturbide's former enemy, and planned a *coup d'état* to join Guerrero to overthrow the Spanish colonial authorities. Together, Guerrero and Iturbide created the Plan of Iguala.<sup>104</sup>

### Plan of Iguala

The Plan of Iguala was comprised of three key components. First, there would be equal treatment under the law for both *peninsulares* and *criollos*. Second, Catholicism would be the official religion of Mexico. And third, Mexico would be a moderate monarchy. There was even talk of inviting a European prince to govern Mexico.

The three parts of the plan were known as union, religion, and independence, or the Three Guarantees. The Three Guarantees were represented on the Mexican flag. Red represents the union of America and Europe, aka the blood of the *criollos* and the *peninsulares*. The color white represents the purity of Catholicism. Green represents the hope of independence.<sup>105</sup>

The Plan of Iguala was actually a compromise. Instead of asking for the death of the *peninsulares*, Iturbide actually showed them some favor.<sup>106</sup> Iturbide would thus be the one to lead Mexico to independence from Spain in 1821.

### Impact of Independence

Iturbide had freed Mexico from Spain by staging a *coup d'état*. In doing so, several bad precedents were set that would plague Mexico well into the twentieth century.

First, revolutionary movements were almost always preceded by a plan that outlined the goals of the rebellion in the hopes of gaining wider

support from the people.<sup>107</sup> For a century, the military was very much involved in politics and continually pursued gaining wealth from the nation.<sup>108</sup> And lastly, the precedent of *coup d'état* would be well established in Mexican politics. Instead of using the vote to remove a leader, more often than not, a Mexican leader would be overthrown through a coup.

### Iturbide Takes Power

It did not take long for Iturbide to elevate himself to the position of emperor of Mexico. In fact, he made himself *Generalísimo de Tierra y mar* (highest general of the earth and sea) and gave himself a large salary.<sup>109</sup> However, Iturbide's reign would not last long as he created and inherited many problems that Mexico faced as an infant nation. In the end, Iturbide was not an emperor, but rather he was a *caudillo*. A *caudillo* was an appealing military leader with a personal following.<sup>110</sup> This would not be enough for Iturbide to sustain any type of control over Mexico.

### Iturbide's Issues

The independence movement had left Mexico in a bit of chaos. First, the silver mining was destroyed which meant the national currency lost its backing. Secondly, individuals that had money and capital were investing their money outside of Mexico rather than re-investing it into their own country. Furthermore, agricultural production had decreased causing food prices to rise. And lastly, Iturbide had a large standing army and over 40,000 officers he had to pay.

Although Iturbide inherited several key problems of an independent Mexico, he also did not do much to make the people of Mexico like him. Iturbide was criticized for nepotism. He awarded noble titles to his family and even made the birthdays of some of his family members national holidays. If a person wanted to see Iturbide, that person had to kneel and kiss his hand.<sup>111</sup>

## Section 2: Independence

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However, Iturbide's greatest mistake came when he would set a horrific precedent that plagued Mexico for the remainder of the nineteenth century. He became the first Mexican leader to get rid of a legislative branch that had disagreed with him.<sup>112</sup> The people's voice in government was thus eliminated.

### The End of Iturbide's Reign

Iturbide was not a popular leader amongst many people in Mexico. Thus, Iturbide did not remain in power for very long. A man who became a major player in Mexican politics for the next several decades, Antonio de Padua María Severino López de Santa Anna y Pérez de Lebrón (many just called him **Santa Anna**), sensed Iturbide was losing popularity and could be overthrown. Thus, he entered the scene with his own plan, the **Plan de Veracruz**, in which Mexico was turned into a **republic**.<sup>113</sup> Iturbide would eventually be arrested for treason and met his demise in front of a Mexican firing squad in 1824.<sup>114</sup>

### Section 2 Review:

1. Define the following terms: tyranny, conspirator, *grito de Dolores*, treason, guerrilla, coup d'état, Plan of Iguala, precedent, *caudillo*, capital, nepotism, Plan de Veracruz, republic.
2. What role did Father Hidalgo, José Morelos, and Agustín de Iturbide play in the Mexican independence movement?
3. Explain the Plan of Iguala and how it is represented on the Mexican flag.
4. Why did Iturbide not last long as the leader of an independent Mexico? Why is his fall from power, and later his death, a bit ironic?

## Section 3: Creating a Constitution

### HELPFUL HINTS



Key Terms



Key Individuals



Valuable Information

## Chapter

# 2

## Forming a Republic

**I** turbide's reign as emperor was short lived. After his execution, the Mexicans wanted to create a republican government. However, even though most Mexicans wanted to create a republic, they could not agree on how to establish their new government. Thus, two competing groups emerged, the centralists and the federalists, who fought for power in an attempt to mold the new Mexican republican government.

### Centralism vs. Federalism

Centralism was based on the idea that the new Mexican government should have a strong central or federal government. Centralists also argued that the Catholic Church should maintain a strong political influence within the new Mexican nation.

Federalism argued that the new nation should maintain a weak central or federal government. Federalists believed that political strength should be held in the states within Mexico. Federalists also wanted to end the political influence of the Church.<sup>115</sup>

### The Constitution of 1824

Eventually the centralists and the federalists compromised and created the Constitution of 1824 which organized Mexico into a republic with 19 states and four territories. The federal government's power was separated into three branches: the executive, the legislative, and the judicial. No one branch would have all the power.

Clearly, there were some similarities to the Constitution of 1824 and the U.S. Constitution. Just like in the United States, the job of the executive in Mexico was to execute the laws, the legislative branch made the laws, and the judicial

branch interpreted the laws. The division of power within the Mexican federal government pleased the federalists.

The Mexican legislative branch, or Congress, had two houses: the Senate and the Chamber of Deputies. Each state would get two representatives in the Senate but representation in the Chamber of Deputies would be based on each state's population. The executive, or President, would be elected by state legislatures and serve a four year term.

The centralists also got something they wanted out of the Constitution of 1824. Under the new constitution, the Catholic Church would get to maintain its power. Furthermore, in times of crisis, the President was given emergency powers and was allowed to make decisions like a dictator without consulting the Congress.<sup>116</sup>

### Caudillos

*Caudillos* (charismatic military leaders with a personal followings) did not show much respect for the newly created constitution. *Caudillos* had armies at their personal command and they thus fought for power after independence. Their power came from their charm and the personal alliances they were able to develop by promising a material benefit to their followers, or clients, who returned the favor by giving their loyalty to the *caudillo*. This practice was known as clientelism. Clientelism used family, marriage, and friendship to create economic and political power. *Caudillos* often switched between the philosophies of centralism and federalism to gain and maintain power.<sup>117</sup>

### A Troubled Start

The first president under the Constitution of 1824 was Guadalupe Victoria. He had a hard



## Section 3: Creating a Constitution

time dealing with the *caudillos*, especially Santa Anna.<sup>118</sup> In fact, his own Vice President tried to overthrow him, even though the attempt was unsuccessful. When it came time for the second election, Santa Anna and others did not like the results and made **Vicente Guerrero**, a *caudillo*, the next president.<sup>119</sup>

Just as Guerrero took office in 1829, Spain attempted to recapture its colony. The Spanish invaders were defeated by Santa Anna. After the failed attempt at re-conquest, many Spaniards left Mexico. They felt like they would be blamed and targeted for the attempted re-conquest. Because these Spaniards were wealthy, when they left, a lot of money and other resources also left Mexico. Thus, Spanish investors were replaced by British, French, and German merchants. This made Mexico extremely dependent on European powers.<sup>120</sup> Foreign dependence would not benefit Mexico and would be a problem for the Mexican nation for many years.

Furthermore, under the new constitution the president could act like a dictator in times of emergency. Guerrero viewed Spain's attempted re-colonization of Mexico as an emergency. When the Spanish were defeated, Guerrero refused to give up his power. Guerrero's own vice president staged yet another coup and was successful. Guerrero tried to escape the country unsuccessfully and was eventually captured. Found guilty of treason, he too died at the hands of a firing squad, just like Hidalgo, Morelos, and Iturbide.<sup>121</sup> Mexico now turned to Santa Anna for leadership.

### Santa Anna

**Santa Anna** was born in 1794. He was a *criollo* and joined the army at the age of 16. When Iturbide switched sides in the fight for independence, Santa Anna followed Iturbide's lead and switched sides as well. Ironically, he would be one of many who helped to overthrow Iturbide.<sup>122</sup>

Between 1821-1850 Mexico had 50 changes in its government. Eleven of those times involved Santa Anna surrendering or retaking power.<sup>123</sup> During these years, the average term in office for a president was only seven and half months.<sup>124</sup> Santa Anna, like most *caudillos*, switched back and forth in his political beliefs. Up until 1834, Santa Anna was

described as a federalist. After 1834, he was a centralist.<sup>125</sup> Santa Anna played such an important part in Mexican history that it was said that "...post-independence Mexican political history was the history of Santa Anna's revolutions."<sup>126</sup>

As president eleven different times, he got bored with the daily affairs of running the country and went home and left the ruling of Mexico to his vice president.<sup>127</sup> He made everyone call him "His Most Serene Highness."<sup>128</sup> More often than not, he portrayed himself as the protector of Mexico as he attempted to repel the Spanish, the French, and the Americans.<sup>129</sup> He even lost his leg fighting against the French in what became known as the "Pastry War."<sup>130</sup>

### Section 3 Review:

1. Define the following terms: republican, centralist, federalist, centralism, federalism, compromise, executive, judicial, legislative, congress, clientelism.
2. Compare and contrast the U.S. Constitution with the Mexican Constitution of 1824.
3. Why was Mexico so politically unstable between the years of 1821-1850?

## Section 4: Trouble with the U.S.

### HELPFUL HINTS



Key Terms



Key Individuals



Valuable Information

## Chapter

# 2

## Trouble in Texas

For Mexico, Texas was a distant frontier. In the year 1800, Texas only had about 7,000 people living in the area. Mexico hoped to establish a buffer zone against both the encroaching Native American tribes and the Americans who were pushing westward. Their plan, however, would only serve to backfire and caused major tension between the United States and Mexico.

### Americans are Invited to Texas

Mexico gave permission to **Moses Austin**, and later his son **Stephen Austin** after Moses' death, to settle 300 American families in Texas beginning in 1821 as long as they were Catholic, had good moral character, and agreed to follow all Mexican laws.<sup>131</sup> Furthermore, land in Texas was extremely cheap—it was only ten cents an acre compared to \$1.25 in the United States. The idea worked and settlers began migrating to Mexico. By 1835, Mexico had 30,000 people. However, only 7,800 of those were Mexican. It did not take long for tension to mount between the American colonists and the Mexican government as the Americans stopped following the Catholic faith and some were even fugitives fleeing punishment in the United States.<sup>132</sup>

### Tensions Grow

As the Americans living in Texas continued to ignore the rules established in order to be colonists in the country of Mexico, the Mexican government began to crack down on the Texans. In 1829, the Mexicans had abolished slavery. This upset the Texans who had brought their slaves into Mexico. In 1830, Mexico closed all immigration

from the United States. Ironically, during the early 1830s, it was the Americans that were migrating illegally into Mexico.

In 1836, Santa Anna was once again back in power after he gave it up for a short period. This time, however, he had shifted gears from being a federalist to a centralist. In 1836, he abolished the Constitution of 1824 and created the new **Constitution of 1836**. The new constitution favored centralism and the states lost political power.<sup>133</sup>

The new constitution reduced the voice the Texans had in the Mexican government. As former citizens of the U.S., the Texans did not appreciate having their voices silenced by a strong government.

### War on the Texas Frontier

Santa Anna had enough of the Texans ignoring Mexican laws and once again took up arms. This time he went to war against mostly American colonists living in Texas. He won a victory at the **Alamo** and would not allow any Texan defenders of that old Spanish mission to leave with their lives. The Mexicans also caught the Texans out in the open at **Goliad**. Hundreds of Texans were massacred.

Santa Anna seemed to be doing quite well until he was caught off guard by **Sam Houston** at **San Jacinto** and lost a decisive victory in only an 18-minute battle. Two days later, Santa Anna was captured and signed a treaty.

Texas was now an independent nation—the **Lone Star Republic**—from 1836-1845. (It would not become a part of the United States until 1845). Mexico wanted to reclaim Texas, and should have easily been able to do so, but Mexico was so troubled with internal issues it was never able to take back Texas.<sup>134</sup>



## Section 4: Trouble with the U.S.

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### The Mexican-American War

In 1845, the United States **annexed** Texas. Soon the two nations found themselves feuding over what the official boundary between the two nations should be—the Nueces River or the Rio Grande River. (The Rio Grande is referred to as the Rio Bravo in Mexico).

#### War Erupts on the Border

Newly elected President of the United States, **James K. Polk**, was looking to expand America's boundaries. He wanted not just more of Texas, but California and some other pieces of Mexico as well. When Mexico told Polk he could not purchase the land, he came up with a new plan. He sent **General Zachary Taylor** into the disputed territory between the Nueces and Rio Grande Rivers. When Taylor was attacked by Mexican forces, Polk went to Congress stating that American blood had been spilled on "American" soil. The U.S. Congress declared war on Mexico.

The Mexicans believed the Americans had taken Texas and now were trying to get their hands on more of Mexico's land. When Mexico tried to defend its territory, the Americans cried the Mexicans had invaded the United States. Mexico was once again at war and once again Santa Anna returned from his failure in his dealing with the Texans to defend Mexico. This time Santa Anna would be facing the U.S. army.<sup>135</sup>

#### Battle for Chapultepec Castle

The Mexicans had a difficult time stopping the American army as it advanced towards Mexico City even though the Mexican army was larger and more experienced. On the outskirts of Mexico City, Santa Anna made his last stand at **Chapultepec Castle**. It was located on a 200-foot hill and was further fortified by a stone wall. The castle was defended by the cadets of the Mexican military academy. The castle was stormed by Americans and the fight turned

into hand-to-hand combat. The last defenders were the cadets, or **Niños Héroes**. Rather than surrender, they chose to die in battle. The youngest, **Juan Escutia**, wrapped himself in the Mexican flag and jumped to his death rather than let the Americans capture the flag.<sup>136</sup> The *Niños Héroes* are still honored to this very day with a monument in Mexico City.

#### Treaty of Guadalupe Hidalgo

The Americans were soon in Mexico City after the fighting at Chapultepec Castle. The Mexicans had no choice but to settle for peace. Under the **Treaty of Guadalupe Hidalgo**, the treaty that ended the war, Mexico lost half its territory and received only a \$15 million payment from United States.




The war and the treaty had a tremendous impact on Mexico. First, Mexico would lose the border dispute surrounding Texas, California, and what the Americans would call the New Mexico territory. This was half of Mexico's land. To make matters worse, in 1849, gold was discovered in California. However, California was no longer a part of Mexico. Furthermore, mistrust was created between the two nations that exists to this very day. Stereotypes and prejudices emerged and the Mexicans developed **Yankeeophobia**. And lastly, Mexico was humiliated with the defeat as the nation surrendered a tremendous amount of power to the United States. Thus, the relationship between the U.S. and Mexico from roughly the end of the Mexican-American War to the present has been described as **asymmetrical** by historians because the U.S. had gained and maintained power over Mexico.<sup>137</sup>

#### Section 4 Review:

1. Define the following terms: Lone Star Republic, annex, Treaty of Guadalupe Hidalgo, Yankeeophobia, asymmetrical.
2. Why were Americans invited to Texas by Mexico? Why did this arrangement not work out between the settlers and Mexican government?
3. Why is the Mexican-American war so impactful on the relationship between U.S. and Mexico?

## Section 5: The Reform

### HELPFUL HINTS

	Key Terms
	Key Individuals
	Valuable Information

## Chapter

# 2

## A New Era for Mexico

In 1855, Santa Anna was finally removed from power the last time through the Revolution of Ayutla.<sup>138</sup> Mexico would look to make changes to the way its government functioned. A new leader emerged in the form of a Zapotec Indian, **Benito Juárez**. As Mexico's first indigenous president,<sup>139</sup> he attempted to rejuvenate Mexican politics.

### The Reform

With the ousting of Santa Anna, Mexico entered a period known as **The Reform**. The Reform was sometimes referred to as Mexico's second independence as it attempted to eliminate what was left of the colonial era.<sup>140</sup> The purpose of The Reform was to both modernize Mexico and make it a more democratic nation.<sup>141</sup>

There were three major laws that came out of The Reform. The first law, **Ley Juárez**, made the military and Church stand trial in civil court. This created equality before the law. The second law, **Ley Lerdo**, cut back on the amount of land the Church could own. And the last law, **Ley Iglesias**, forbade the Church from charging high fees for giving sacraments because the poor could not afford the price the Church charged for administering the sacraments. Under **Ley Iglesias**, the poor would get the sacraments for free.

A new constitution was also created, the **Constitution of 1857**. It was very similar to the Constitution of 1824 except the legislative branch had a one house legislature, the laws of **Ley Juárez**, **Ley Lerdo**, and **Ley Iglesias** were included, and there was freedom of speech, press, and a focus on education.<sup>142</sup>

### The War of the Reform

The Church and the military did not accept the new constitution and its laws like **Ley Juárez**, **Ley Iglesias**, and the other freedoms it granted. Even Pope Pius IX spoke out against the new constitution. Mexicans faced quite a dilemma. If they did not follow the constitution they were considered traitors to their country, if they did follow the constitution they were considered **heretics** in the view of the church. The Reform laws and the constitution divided the Mexican people into two groups and once again Mexico entered into a civil war. The **War of the Reform**, 1858-1861, was bloodier than any of Mexico's previous civil wars.<sup>143</sup>




During the war, there were two governments in Mexico with Juárez in charge of one and **Felix Zuloaga** leading the other. After three horrendous years of fighting, Juárez emerged victorious. After the defeat of Zuloaga, Juárez ran for president and won the election of 1861. However, peace was short lived for Mexico. Juárez and Mexico would soon be at war again as they would soon be facing a foreign army.<sup>144</sup>

### Section 5 Review:

1. Define the following terms: of **Ley Juárez**, **Ley Lerdo**, **Ley Iglesias**, heretic
2. Compare and contrast the Constitution of 1824 with the Constitution of 1857.
3. Why was the Constitution of 1857 so controversial?

## Section 6: The French Intervention

### HELPFUL HINTS

-  Key Terms
-  Key Individuals
-  Valuable Information

## Chapter

# 2

## Return of Foreign Powers

Mexico became greatly dependent on foreign money and capital early on in its history. This trend would continue as the War of the Reform had cost Mexico quite a large sum, so they were forced to borrow from Great Britain, France, and Spain. After the war, Mexico did not have the money to pay off their loans. Great Britain, France, and Spain all sent troops to Mexico to collect their payments.

Little did Spain and Great Britain realize that **Napoleon III** of France wanted more than his money back—he wanted a French colony. Upon realizing this, Spain and Great Britain removed their troops leaving France to fight alone against Mexico.<sup>145</sup>

## Battle of Puebla

The French began their march inland from the coast and were winning victories against the Mexican army until they ran into trouble at the town of Puebla. On **May 5, 1862 the Battle of Puebla** was fought. The Mexicans achieved a great victory with the help of a mestizo general by the name of Porfirio Díaz. (This is why Mexicans and Americans celebrate **Cinco de Mayo**. Cinco De Mayo has nothing to do with Mexican independence. In fact, it was just one battle that Mexico won against the French forces). Though a celebrated victory, the Battle of Puebla only managed to slow the French forces. A year later the French marched into Mexico City and claimed Mexico as a colony.<sup>146</sup>

## French Monarchs Arrive in Mexico

Napoleon decided to make Mexico a monarchy and placed the young couple **Archduke Ferdinand Maximilian** and his wife **Charlotte (Carlota)** on the Mexican throne. The two arrived in 1864.<sup>147</sup> The Mexicans did not welcome this royal couple which greatly upset Carlota. She wanted to feel welcomed to Mexico.<sup>148</sup> Maximilian and Carlota eventually made it to Mexico City and made their home in Chapultepec Castle.<sup>149</sup>

After the French army had defeated his forces, Benito Juárez retreated to the U.S.-Mexican border where he fought against the French using guerrilla warfare.<sup>150</sup> Maximilian fought against Juárez's guerrillas for his entire reign.

## The Downfall of the French

Maximilian did not make any allies as ruler of Mexico as he allowed for the freedom of the press and even treated the Church the same way as Benito Juárez.<sup>151</sup> This turned out to be a poor decision as the church was actually supporting the French invasion. He angered many people which certainly did not help him rule Mexico for an extended period of time.

Under the **Monroe Doctrine** of the 1820s, the U.S. had warned foreign powers to stay out of the western hemisphere. The U.S. certainly did not want a French colony so close to its borders. However, in the early 1860s, the U.S. was preoccupied with its own Civil War. The North had to be careful not to allow a French-Southern alliance.<sup>152</sup> Benito Juárez had to wait until the American Civil War was over before any help would come from the United States. When northern victory seemed assured, Abraham

## Section 6: The French Intervention

Lincoln, and after his death, William Seward, Lincoln's Secretary of State, pressured Napoleon to leave Mexico and even allowed Americans to sell guns to Benito Juárez. Thus, Napoleon began removing troops from Mexico.<sup>153</sup>

Carlota returned to Europe to try to get Napoleon and others to help her husband. She even asked the Pope, but he refused to send help. He was not happy with the way Maximilian had treated the Church in Mexico. Maximilian wanted to leave, but Carlota convinced him to stay in Mexico.<sup>154</sup>

With the French troops leaving, it did not take long for Maximilian to lose power and get captured. He was tried, found guilty, and executed. This action by Juárez sent a message to the rest of the world that Mexico was an independent nation.<sup>155</sup>

### Impact of the Intervention

The French Intervention had a tremendous impact on Mexican. First, it showed that Mexico was independent.<sup>156</sup> Mexican nationalism increased and it was a victory for the Constitution of 1857. However, Mexico would continue to lack political stability and failed to achieve any economic growth for years.<sup>157</sup>

## The Restored Republic

With the French monarchy removed from Mexican soil, Benito Juárez returned to power. Though free from foreign intervention for the time being, Juárez now had to deal with the many internal issues plaguing Mexico and its people.

### Issues after the French Intervention

Benito Juárez was once again President of Mexico but he had a nation that faced a host of problems. The Mexican treasury had no money and the federal government had very little power. And to make matters even worse, the *caudillos* were

still maintaining power. The nation had extremely poor **infrastructure** and communication systems. Mexico's silver mines, so key to financing the Mexican economy, were unproductive.<sup>158</sup> Lastly, much of Mexico was illiterate. As of 1874, 95% of Mexico's children did not attend school which led to mass illiteracy in the nation.<sup>159</sup>

### Juárez Asserts his Authority

To deal with the many issues facing Mexico, Benito Juárez became a more **authoritarian** type of ruler. He rigged elections to make sure his favorites obtained and maintained power. He tried to limit the powers of the Congress and states by amending the Constitution. He also created the **rurales**, a group of **mounted** and heavily armed military guards. Many of the *rurales* were former bandits who were now hired to work for the government.<sup>160</sup>

### Positivism

It was during this era that a new kind of political philosophy emerged—**positivism**. Positivism focused on the economic development of a nation and pushed Mexico to develop into a strong country. Positivists believed all problems had a scientific and rational solution. This kind of scientific politics argued that scientists and engineers, not politicians, should shape the nation.<sup>161</sup>

### A Mexican First

The Mexican people lost one of their greatest heroes when Benito Juárez died in 1872 during his second term in office. His vice president, **Sebastian Lerdo**, replaced him and was later elected to his own four year term. This was a rather significant event as it was the first time in Mexico's history that two consecutive administrations had not been overthrown through bloodshed.<sup>162</sup> That, however, would not last for long.

## Section 6: The French Intervention

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### Enter Porfirio Díaz

**Porfirio Díaz**, a hero at Puebla on Cinco de Mayo, fought during the civil wars and the French Intervention. He felt that the presidency should be his. He had lost two elections to Benito Juárez, and on two other occasions had attempted to overthrow the government by force. Díaz knew Lerdo was afraid of building railroads to the U.S. border (Lerdo was believed to have said, “Between weakness and strength, let there be the desert!”).<sup>163</sup>

Díaz approached some U.S. investors from South Texas and with the help of their money he staged yet another coup under the **Plan of Tuxtepec**. Under this plan, Díaz argued that Lerdo committed voter fraud and that Lerdo was seeking yet another term as president despite a rule in the constitution that did not allow reelection.<sup>164</sup> Thus Díaz was able to rise to power. He did not relinquish this power for the next 35 years.

### Section 6 Review:

1. Define the following terms: Monroe Doctrine, infrastructure, authoritarian, *Rurales*, mounted, positivism, Plan of Tuxtepec.
2. What happens on May 5, 1862? Why does it have nothing to do with Mexican independence?
3. How was Maximilian eventually removed from power? Why was his execution significant?
4. Why do you think Benito Juárez had to become a more authoritarian ruler?
5. How does Porfirio Díaz discredit Sebastian Lerdo?

## Section 7: The Porfiriato

### HELPFUL HINTS



Key Terms



Key Individuals



Valuable Information

## Chapter

# 2

## The Porfiriato

Porfirio Díaz gained power in 1876. He did not lose control of Mexico until 1911. The 35 years that Díaz was dictator of Mexico became known as The Porfiriato.

### Order, Progress, & the Científicos

The catch phrase for the Porfiriato was the positivist phrase “order and progress.” The positivists admired U.S. technology and French culture. They believed that Mexico could contribute to the world.<sup>165</sup>

Díaz surrounded himself with a group of positivist advisors known as the **Científicos**. For *científicos*, scientific management of Mexico meant political stability which would bring foreign investment into their country. *Científicos* had great political and financial power during the Porfiriato. With Díaz, they controlled Mexico and Díaz maintained their loyalty through clientelism.<sup>166</sup> *Científicos* hated the poor and the illiterate masses and blamed this group for Mexico’s failure to develop. *Científicos* believed the future was with the *criollo* elite-this created a bigger gap between rich and poor.<sup>167</sup>

The *Científicos* and Díaz also believed there needed to be rule of law (order and progress/positivism) if they were going to get foreign investment into Mexico to help modernize. In other words, Díaz needed stability within to create “modernization from without.”

### Foreign Investment in Mexico

Díaz wanted to improve much of the infrastructure within Mexico. One aspect of the Mexican infrastructure that was in desperate need of an upgrade was Mexico’s railroad system. In 1876, Mexico had 400 miles of railroad track. By 1911, it would have 15,000 miles of track.<sup>168</sup>

Díaz also improved the mining and oil business in Mexico. However, all of these improvements came at a cost as Díaz modernized Mexico with foreign resources. For example, 80% of the money for the railroad came from the U.S.<sup>169</sup>

This foreign investment was initially good for Mexico but it would have long term consequences as foreigners were driving the Mexican economy. Mexico would see **capital flight** and its citizens suffered damaged national pride for they believed Díaz had sold them out.

### Some Positives of the Porfiriato

By the time Díaz left power in 1911, Mexico would be one of the largest exporters of oil in the world. The amount of goods being manufactured in Mexico doubled.<sup>170</sup> The Mexican treasury had a surplus.<sup>171</sup> Mexico had good foreign credit, and the wealthy had a sense of self-confidence.<sup>172</sup>



# The Downfall of Díaz

## Rich get richer, poor get poorer

The Porfiriato was definitely an example of the rich getting richer and the poor getting poorer. By 1910, half the Mexican population lived and worked on haciendas as peones.<sup>173</sup> Twelve times poorer than a U.S. farm laborer,<sup>174</sup> *peones* worked from sunrise to sunset seven days a week. They were paid in metal discs that could only be used at the *tienda de raya*, an all-purpose company store located directly on the hacienda. The store gave credit to the *peones* and charged high prices. *Peones* could never leave the hacienda as long as they owed money. This was called debt peonage.<sup>175</sup>

Díaz developed his country by ignoring the needs of the poor majority. The wealth he generated did not trickle down to the masses.<sup>176</sup> How then, was Díaz able to maintain power for so long?

## Pan o Palo

Díaz was able to maintain his power through his *pan o palo* (bread or stick) philosophy. The “bread” was given to the elite as Díaz sought to keep them loyal by buying their support to create political stability in Mexico. Díaz also used the elite to maintain control over the laboring class of Mexico to help avoid labor revolts and possible work stoppages.

The “stick” was the force Díaz used against any threats to his political power as well as against the poor masses. The *rurales* became Díaz’s own personal intimidation force and were greatly feared by all. Díaz spent a quarter of the Mexican budget on the military and the *rurales*. He needed “forced peace” for modernization.<sup>177</sup>

As dictator, Díaz used other methods to maintain his power as well. He rigged elections, allowed no freedom of the press, supported the Church, and the Mexican Congress was a rubber stamp.

However, for all of his strategies to maintain power, the people of Mexico had enough of Porfirio Díaz. His forced exit from power set the stage for a

bloody struggle to determine who and how Mexico would be governed in the future.

## Section 7 Review:

1. Define the following terms: *científicos*, capital flight, *peones*, debt peonage, rubber stamp
2. What role did the *científicos* play during the Porfiriato?
3. What were the positives and negatives of the Porfiriato? How did Porfirio Díaz stay in power for so long?

## Section 1: The Mexican Revolution

### HELPFUL HINTS



Key Terms



Key Individuals



Valuable Information

## Chapter

# 3

## Seeds of Revolution

The *pan o palo* philosophy served Porfirio Díaz well for nearly 35 years. However, Mexicans of all social classes were tired of his reign. Some in the upper class believed Díaz had sold them out to foreign investment. The Mexican middle class wanted a more democratic government, and of course the *peones* were tremendously mistreated under the Díaz dictatorship.

### Francisco Madero and the Guerrilleros

Francisco Madero was one of many men who grew tired of Díaz's dictatorship. After Madero issued his Plan de San Luis Potosí<sup>178</sup> in order to remove Díaz from power, thousands of Mexicans from all social classes began taking up arms to rid Mexico of Díaz. Many Mexicans became *guerrilleros*. *Guerrilleros* had no uniforms, very little military discipline, survived off the land, and attacked small military stations.<sup>179</sup> One general that led a band of *guerrilleros* and was a follower of Madero was Pablo Orozco.

### The Battle of Ciudad Juárez

Orozco eventually trapped Díaz's forces in the city of Juárez just across from the U.S. border. Madero ordered Orozco not to attack because the city was so close to the U.S. and Madero did not want to have an incident where anyone from the U.S. would be injured—he did not want any U.S. interference in Mexico. Orozco disobeyed Madero but won the battle. As a result, Díaz was forced to leave Mexico.

With Díaz finally out of the picture, it appeared that Madero would become Mexico's next leader. But the revolutionaries and the *guerrilleros* of Mexico were only united in one thing—getting rid of Díaz. Because Orozco had disobeyed Madero's orders, Madero did not put Orozco in his cabinet. This created a split between the two men and thus the unity of the revolution began falling apart. Because there was no unifying philosophy of the Mexican revolution, the military continued to challenge the political leadership. *Factions* and personal rivalries turned the revolution into a bitter civil war and allowed the war and violence to drag on for years. This ultimately led to enormous loss of life as well as pain and suffering for countless other Mexicans.<sup>180</sup>

### Fiesta of Bullets

Madero eventually became president, but he soon made enemies of several major *guerrilleros* leaders including Pablo Orozco and Emiliano Zapata. Zapata was a revolutionary that demanded land reform. He wanted all the land taken by big businesses since the 1860s to be returned to the *peones*.<sup>181</sup> Zapata had met with Madero and decided that Madero was not interested in his land reform ideas. Thus, both Orozco and Zapata led rebellions against Madero.

Madero sent Victoriano Huerta to deal with the uprising against Pablo Orozco. Fighting with Huerta was another famous *guerrillero*, Pancho Villa, and a man by the name of Alvaro Obregón. Villa entered the revolution in the hopes of breaking the power of large land owners. Obregón represented the middle class and fought for political stability and improving Mexico's economy. These men were able to defeat Orozco and he was exiled from the country.<sup>182</sup>



## Section 1: The Mexican Revolution

However, Madero's problems were far from over. Victoriano Huerta believed he would make a better leader for Mexico. He staged a coup and had Madero arrested. Later, Madero was assassinated while being moved from jail.<sup>183</sup>

Huerta was not well liked by Zapata and Venustiano Carranza, who was friends with Madero. Even some of Huerta's former allies like Pancho Villa and Alvaro Obregón turned against him. These men agreed on nothing other than the fact they wanted to get rid of Huerta.<sup>184</sup> Huerta was no match for these men and he was forced from power.

With Huerta removed from power, Venustiano Carranza became president of Mexico. However, both Villa and Zapata turned against Carranza and Obregón. Carranza was able to deal with Zapata by having him assassinated in 1919.<sup>185</sup> Ironically, Carranza's time was also short-lived. He managed to make an enemy of Obregón and he too was ambushed and assassinated by men loyal to Alvaro Obregón in 1920. This was the last assassination of a sitting Mexican president.<sup>186</sup> A few years later, in 1923, one of the last of the great Mexican revolutionaries, Pancho Villa, was also assassinated.

### Impact of the Revolution

Undoubtedly, the Mexican Revolution was the most important event that happened in 20<sup>th</sup> century Mexico. Secondly, it was the first social revolution of the 20<sup>th</sup> century.<sup>187</sup> It was also extremely violent. During the war years, between 1.5 and two million Mexicans were killed. That meant that nearly ten percent of the Mexican population died in the revolution. Captured soldiers were executed and there were horror stories of hangings and soldiers whose bodies were mutilated. The Mexican infrastructure was destroyed. And yet despite all the carnage, the Mexican people soon rebuilt their nation out of the ashes from the Fiesta of Bullets.<sup>188</sup>

## Constitution of 1917

The Mexicans wrote several constitutions throughout the course of their history. The Mexican Revolution created an environment of change and thus the Mexicans once again generated a new government. The Constitution of 1917 was certainly unique as it was the first in the world with a social agenda.<sup>189</sup> Furthermore, it sought to separate the Church from the governing of the nation.

### Article 27

Article 27 was a very important piece of the newly created Mexican constitution. It stated that the land and the subsoil belonged to Mexico. Foreigners could only gain access to the natural resources of Mexico by filing an application with the federal government. This was certainly a reaction to the Díaz regime when he was accused of selling out Mexico's resources to foreign investors.

Part of Article 27 included land reform to help the lower classes that had been neglected under the Díaz regime. In order to achieve that goal, the Mexican government could expropriate, or nationalize, private property that was either owned by Mexicans or investors from other nations. Owners whose land was expropriated by the government were supposed to be paid for their loss.<sup>190</sup>

### Article 123

Article 123 of the Mexican constitution was another key part of the document created to help bring social change to Mexico. This article dealt with working conditions. It created an eight-hour work day, six-day work week, set a minimum wage, and ended debt peonage.<sup>191</sup>

## Section 1: The Mexican Revolution

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### Constructive Phase of the Revolution

Following the Fiesta of Bullets, Mexico entered an era of the revolution known as the **Constructive Phase**. This part of the Revolution lasted between 1920-1940 and focused on rebuilding Mexico under the rules and regulations created in the Constitution of 1917.

#### The Sonoran Triangle

The Constructive phase was led by three consecutive presidents who all came from the Sonora region of Mexico. Thus, these three men, **Adolfo de la Huerta, Alvaro Obregón, and Plutarco Calles** became known as the **Sonoran Triangle**. These men created a precedent that came to have a lasting impression on Mexican politics—the practice of ***dedazo***. *Dedazo*, or finger point, was the precedent of the outgoing president picking his replacement. For example, Obregón supported Calles in the election of 1924. The precedent of *dedazo* lasted for almost the rest of the 20<sup>th</sup> century.<sup>192</sup>

#### Section 1 Review:

1. Define the following terms: *guerrilleros*, factions, expropriate, *dedazo*.
2. Why did a horrific civil war break out after Díaz was removed from power? Who were the leaders of the different factions and what views did they have on reforming Mexico?
3. What was so revolutionary about the Constitution of 1917? How was it designed to reform Mexico?
4. Do you think the precedent of *dedazo* was a positive or a negative for Mexico? Explain.

#### HELPFUL HINTS



Key Terms



Key Individuals



Valuable Information

## A New President Takes Office

When it became time for Plutarco Calles to step down from power, **Lázaro Cárdenas** became the next president of Mexico. This ushered in a new era in Mexico as Cárdenas did more than any of the presidents that came before him in enforcing Article 27 of the Constitution of 1917.

### Changing Mexican Society

Between the years of 1935 to 1940, Lázaro Cárdenas attempted to carry out Article 27 to its fullest. Cárdenas was a man who wanted to reform Mexican society. His work eventually ended the traditional hacienda system of Mexico. He redistributed 50 million acres of expropriated land (5-6 million of those acres belonged to U.S. investors), destroyed the landed elite, and created low interest rates so the poor could get loans.<sup>193</sup>

### PEMEX – “The Oil is Ours”

Cárdenas continued to reshape Mexico in 1938 when he nationalized the entire oil industry in Mexico. On March 18, 1938, Cárdenas signed a law that expropriated the resources of almost all of the foreign oil companies in Mexico. He then created Petroleos Mexicanos or **PEMEX**. PEMEX was a state-owned company that held a **monopoly** over Mexican oil production and did not allow foreign oil companies into Mexico.<sup>194</sup>

Today, Mexico is one of the ten largest oil producers in the world<sup>195</sup> and roughly 80% of its oil is shipped to the United States.<sup>196</sup> Furthermore, PEMEX acts like a “cash cow” as it helps to supply the federal budget.<sup>197</sup> PEMEX funds 40% of the federal budget and thus is a company that loses money even though the price of gasoline is high.<sup>198</sup> Despite being the largest company of its kind in Mexico and maintaining a monopoly on all Mexican oil exploration, production, and marketing, PEMEX “...may be the least efficient large oil company in the world.”<sup>199</sup>

## Economic Development in Mexico

### World War II

The Mexican Revolution ended with the start of World War II. During World War II, Mexico sided with the Allies (the U.S., France, Great Britain, and the Soviet Union). Thanks to the Bracero Program, an immigrant labor program, Mexicans signed a contract to work in the U.S. and then return home. They worked on farms, on railroads, and in factories. Mexico also supplied the Allies with important raw materials such as minerals and metals.<sup>200</sup>

World War II also helped the Mexican economy as it brought increased foreign investment into Mexico. During the war, Mexico exported more than it imported.

Mexico also adapted the economic policy of **ISI (import-substitution industrialization)**.

## Section 2: Social and Economic Change

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During the war years, Mexico could not depend on the U.S. and Europe to import manufactured goods as those countries' industries were geared to supplying the troops. Mexico's own manufacturing thus increased and was aided by the government through the passing of protective tariffs.<sup>201</sup> Thus the stage was set for the "Mexican Miracle."

### The Mexican Miracle

During the "Mexican Miracle" the Gross Domestic Product (GDP) had a growth rate of about 8% between the years of 1948 and 1968. The Mexican middle class grew and became very similar to the U.S. middle class. There was a vast improvement in Mexico's literacy and healthcare. However, as positive as this looked to the rest of the world, once again the lower class saw few benefits from this economic up-turn.<sup>202</sup>

### Maquiladoras

As Mexico continued to industrialize, foreign companies realized that Mexico had a valuable labor force. Soon maquiladoras, or partial assembly plants, were placed in Mexico close to the U.S.-Mexican border. Companies like General Motors, Coca-Cola, Ford, and Goodyear invested in Mexico and moved some of their manufacturing there.<sup>203</sup>

Thousands of Mexicans, mostly women, found jobs in the *maquiladoras*. They assembled the goods and shipped the finished product back to the United States. However, *maquiladora* workers were subjected to poor working conditions and low wages.<sup>204</sup>

### Americanization




The decades of the 1950s and 1960s also saw some "Americanization" of Mexico. Mexicans began doing things like eating hamburgers and drinking soft drinks. (Mexico is one of the leading consumers of soft drinks today). Mexicans ordered from the Sears-Roebuck catalog and began watching television. Furthermore, U.S. tourism to Mexico increased during these years boosting the economy as well as infusing Mexico with some American culture.<sup>205</sup>

### Section 2 Review:

1. Define the following terms: Bracero Program, ISI, protective tariff, Gross Domestic Product, *maquiladora*.
2. Why does PEMEX operate at a loss?
3. Do you think *maquiladoras* have a positive or negative impact on Mexico? Explain.
4. Is Americanization good or bad for Mexico? Explain?

## Section 3: The PRI

### HELPFUL HINTS

-  Key Terms
-  Key Individuals
-  Valuable Information

## Chapter

# 3

## Party Dominance

### The *Partido Revolucionario Institucional* (PRI)

The political party commonly known as the PRI (the *Partido Revolucionario Institucional*-Institutional Revolutionary Party) started as the PNR (National Revolutionary Party),<sup>206</sup> changed its name to the Party of the Mexican Revolution (PRM),<sup>207</sup> and finally became the PRI.<sup>208</sup> The PRI ruled Mexico, under various names, from 1929-2000 for a total of 71 years. That made the PRI the second longest ruling party in the world behind the communist party in the former Soviet Union which collapsed in 1991.<sup>209</sup>

The PRI liked the economic philosophies of both capitalism and communism. The PRI was partial to the capitalistic economies of places like the United States, but also liked to have the state play a role in industrialization as in the Soviet Union. For example, the state played a major role in creating and running PEMEX.<sup>210</sup>

The PRI was a very heavy-handed political party and it dominated all levels of politics from the national all the way down to local governments. For decades, the PRI's dominance went unchallenged. In fact, the biggest event in Mexican politics was the unveiling of the next presidential candidate under the precedent of *dedazo*.<sup>211</sup>

### The PRI Begins to Lose Power

In 1968, the PRI killed over 400 political protesters right before the Olympics were to be held in Mexico.<sup>212</sup> This showed many in Mexico as well as around the world that the PRI was becoming too powerful and heavy handed. By

1988, the PRI was starting to lose some of its political force. A depression in 1995 also contributed to the party's loss of power as the PRI lost the majority in the lower house of Congress in 1997.<sup>213</sup>

The PRI's dominance finally came to an end on July 2, 2000 with the election of Vicente Fox. Vicente Fox was a member of the PAN (*Partido Acción Nacional* or National Action Party). His election ended the PRI's dominance of the past 71 years.<sup>214</sup> The PAN maintained power for another six years (unlike U.S. Presidents, Mexican Presidents serve a six year term) when Felipe Calderón of the PAN won the election in 2006. However, in 2012 the PRI regained power with the election of Enrique Peña Nieto.

### Section 3 Review:

1. Define the following terms: Soviet Union, capitalism, communism.
2. Why does the PRI start to lose power?
3. If the PRI controlled Mexico for 71 years, would it be correct to call Mexico a democracy? Why or why not?

### HELPFUL HINTS



Key Terms



Key Individuals



Valuable Information

## Chapter

# 3

## A Pact Between Neighbors

The countries of the world realized that they had become more and more integrated as technology has decreased both time and distance. This integration has been termed **globalization**. More specifically, globalization describes "...a late twentieth- and early twenty-first-century condition of economic, social, and political interdependence across cultures, societies, nations, and regions."<sup>215</sup> Because the nations of North America—Canada, the U.S., and Mexico—are so close together they believed that allowing free trade between their borders would be economically beneficial for each country. Thus, they created **NAFTA** (North American Free Trade Agreement) in 1994.

NAFTA was truly innovative as it became the "first comprehensive trade agreement that brought together an advanced, high-wage country and an economically weaker, low-wage nation."<sup>216</sup> It was designed to increase trade amongst the U.S., Canada, and Mexico. Mexico also hoped to encourage the other nations to invest directly into Mexico.<sup>217</sup>

### The Impact of NAFTA

For Mexico, the hope was that NAFTA would allow Mexico to increase trade with the U.S. and Canada and create more jobs in Mexico through the creation of more *maquiladoras* along Mexico's northern border. The border region did make great economic strides within the first decade of the agreement.<sup>218</sup> The number of *maquiladoras*

along the border did increase from 1,000 in 1990 to over 3,000 by the year 2010.

This agreement, however, forced Mexico to revise Article 27 of their Constitution. Mexicans again felt they were selling out to the highest bidder. As a result of NAFTA, the northern part of Mexico saw economic improvement but the other parts of the country did not see nearly the positive impact.<sup>219</sup> Furthermore, NAFTA was supposed to raise Mexico's GDP and decrease immigration to the United States. Neither of these occurred.<sup>220</sup>

The debate still rages today about whether NAFTA had a positive or a negative impact on Mexico. Both Mexico and the U.S. have entered into other free trade agreements with other countries. Furthermore, economists today have begun the debate of whether or not the idea of free trade is merely "fiction." They cite the costs of shipping goods and the time it takes to cross the border as some of their most convincing evidence. One thing was for certain, poor Mexicans did not believe NAFTA had a positive impact on their lives.<sup>221</sup>

### Section 4 Review:


1. Define the following terms: globalization, NAFTA.
2. Does everyone have to benefit in a country for an agreement to be "positive?" Explain.




## Section 5: U.S.-Mexican Relations

### HELPFUL HINTS

 Key Terms

 Key Individuals

 Valuable Information

## Chapter

# 3

## Immigration

### Push and Pull

People leave their home or country, usually, for one of two reasons: they were either “pushed” out by something that was happening in their own country, or they were “pulled” to a new location based on the potential for opportunity. Mexicans are pushed out of their country due to lack of quality jobs, unemployment, drug violence, and other disasters. However, many Mexicans are pulled out of their country because the United States offers quality jobs. Because it borders the United States there is a demand for Mexican labor. Thus, the pull factors were a greater driving force for Mexicans to migrate to America. However, because some of these Mexicans immigrate illegally, it has created tension along the nearly 2,000 mile long border between the two nations.

### Winners and Losers in Illegal Immigration

Winners in illegal immigration include the Mexican immigrants who come to the United States. Immigrants get better jobs, with better pay, and better working conditions. Between 2002-2008 more Mexicans found jobs in the U.S. than in Mexico<sup>222</sup> where they earned seven to eight times more money than they would in their native country.<sup>223</sup>

The U.S. also benefits from this immigration. Some argue that Mexican labor helps U.S. agriculture and construction.<sup>224</sup>

The Mexican government also benefits as it sees the U.S. as a safety valve for its unemployed. This helps create political and economic stability in Mexico as the nation does not have to deal with labor unions or rebellions. Even the Mexicans

who choose to stay in Mexico benefit as their family members who migrated to America send back remittances. This is money sent back to Mexico by an immigrant. One person working in America can support four people living in Mexico in this way. In 2007, Mexican workers in the U.S. sent \$24 billion back to Mexico.<sup>225</sup>

However, there are certainly some negatives to this illegal immigration into the United States. The Mexican government is embarrassed as it cannot provide for its own people and shows Mexican dependence on the United States.<sup>226</sup> Those entering illegally into the U.S. often hire coyotes, or people that charge immigrants to guide them across the border.<sup>227</sup> Illegal entry into the U.S. is often dangerous. From the years 2000-2008, more than 3,346 people have died attempting to sneak into the United States.<sup>228</sup>

In the U.S., local and state governments feel the economic burden of these immigrants in the form of education and healthcare. Low skilled U.S. workers have seen increased unemployment. The immigrants themselves are sometimes taken advantage of.

The United States, post 9/11, also viewed the border as a potential entry point for terrorists. From 2000 to 2007, half of the 7.3 million immigrants from Mexico to the U.S. entered illegally. Needless to say, the U.S. has spent billions of dollars in an attempt to control the border with Mexico.

## Narco-Trafficking

Narco-Trafficking, or drug trafficking, is the buying and selling of illegal drugs. Combatting the drug trade has become such an issue for both the U.S. and Mexico that the argument has been

## Section 5: U.S.-Mexican Relations

made by foreign policy scholar María Celia Toro that drug trafficking is the *biggest* issue existing between the two countries today.<sup>229</sup> The drug war poses a national security risk for both nations.<sup>230</sup>

### Supply and Demand

Both the U.S. and Mexico play the blame game when it comes to the issue of drug trafficking. It boils down to the simplest form of economics—supply and demand. Mexico believes drug trafficking is a problem because the U.S. has been unable to control its demand for drugs like heroin, cocaine, and marijuana. The U.S. believes the drug problem is a result of Mexico's inability to effectively control the production or supply of drugs.

The United States federal drug control spending mirrors the belief that the supplying of the drugs is the major problem. In 2015, the U.S. spent more money combatting the supply side of narco-trafficking than it did in an attempt to combat the demand side of the problem.<sup>231</sup>

### Impact of Narco-Trafficking

Ironically, narco-trafficking is good for the Mexican economy. It provides jobs and disposable income which people re-invest into the economy. Mexican drug cartels, the criminal organizations involved in narco-trafficking, employ an estimated 450,000 people. Furthermore, an estimated 3.2 million people rely on the money generated through the drug trade.<sup>232</sup> It is estimated that drug cartels generate anywhere between \$13.6-\$48.4 billion dollars a year from the selling of drugs in the United States.<sup>233</sup> With this money, cartels help pay for schools, hospitals, and churches.<sup>234</sup>

However, narco-trafficking also leads to extreme and brutal violence, crime, corruption, addiction, and the countless other negatives of drug use. Corruption amongst law enforcement is so bad that author Charles Bowen stated, "In over a half a century of fighting drugs, Mexico has never created a police unit that did not join the traffickers. Or die."<sup>235</sup> In 2014 alone, 97 federal police officers were arrested on corruption charges.<sup>236</sup>

Drug cartel-related violence is another major issue. In 2008, 5,300 people were killed by drug violence.<sup>237</sup> During the Calderón administration (2006-2012), over 60,000 people died in drug related violence.<sup>238</sup>

Interesting enough, recent statistics have shown that while killings have decreased by 14%, cartel related kidnappings have risen 25.7% and extortion (taking money from someone by using force, violence, or through a position of authority) has climbed by 29.1%.<sup>239</sup>

The U.S. government spends roughly \$26 billion a year to deal with narco-trafficking<sup>240</sup> while Mexico spends about \$5 billion a year to combat the drug trade.<sup>241</sup> Since 2008, the U.S. has given Mexico nearly \$1.3 billion to help strengthen its police and court systems.<sup>242</sup> The Obama administration has even used the U.S. National Guard and unarmed drones to help the fight against narco-trafficking along the U.S. border with Mexico.<sup>243</sup>

Furthermore, the U.S. is not merely a consumer of the drugs, but the U.S. also supplies the weapons the drug cartels use. The cartels purchase their weapons in America—drugs go north, guns go south. The drug cartels often have better weapons than the police. Mexican authorities continually complain to the U.S. government about the guns being moved into Mexico.<sup>244</sup>

### Section 5 Review:

1. Define the following terms: remittances, coyotes, narco-trafficking, drug cartels
2. Explain why illegal immigration can be viewed as both positive and a negative for both the U.S. and Mexico.
3. Why does the U.S. blame Mexico for the drug problem? Why does Mexico blame the U.S. for the drug problem? Who do you think is right? Explain.
4. Why is the border such a major issue for both the U.S. and Mexico today?



# Glossary

**Abolish**-to put an end to

**Allies**-a group or nation that is associated with another for a common cause

**Annex**- to incorporate into a country

**Asymmetrical**- used to describe the relationship between Mexico and the U.S. and how one nation maintains power over the other

**Authoritarian**- exercising almost complete control over the will of others

**Bourbon Reforms**- system designed to maximize profit collection, ensure that Mexico demanded Spanish goods, and established a new tax system that would be collected by the *Peninsulares*

**Bullionism**- the belief that true wealth consisted of precious metals such as gold and silver

**Capital flight**- when capital generated in a country leaves that country and is not used to benefit that country

**Capitalism**- an economic system in which individuals own, produce, and distribute wealth and goods

**Capital**-wealth, usually land or money, held by a person

**Caudillo**- a charismatic military leader with a personal following

**Causeways**- a raised path, usually across water or wet ground

**Centralism**- the idea that the Mexican government should have a strong central government

**Centralists**- individuals who believed the Mexican government should have a strong central government

**Científicos**- a circle of positivist advisors that would rise to great political and financial importance during the Porfiriato

**City-State**-a state consisting of an independent city and its dependencies

**Classic Period**-The period of Mayan dominance from 250-900 AD

**Clientelism**- the practice of using family, marriage, and friendship to create important economic and political networks

**Communism**- economic system in which the wealth is controlled by the state

**Compromise**- an agreement in which both sides agree to give a little to reach a consensus

**Congress**- the legislative body (makes laws) of a nation

**Conquistadors**-Spanish conquerors of Mexico led by Fernando Cortés

**Conspirator**-a person that plots an illegal or unlawful event

**Coup d'état**- a sudden attempt by a small group of people to take over the government

**Coyotes**-people who guide illegal immigrants across the U.S. border for a fee

**Criollos**-People born in Mexico but of Spanish descent

**Debt peonage**- an individual's pledge that their labor will be used in order to repay their debts

**Dedazo**- "finger point;" the precedent established of the outgoing president of Mexico choosing his successor

**Demean**-to lower one's honor or integrity

**Domestic**-relating to the household and family affairs

**Drug Cartel**-criminal organization involved in narco-trafficking

# Glossary

**El Dorado**-Legendary city of gold sought by the Conquistadors

**Encomendero**- conquistadors and their descendants

**Encomienda**-labor grant given to an Encomendero who was given control over an indigenous community

**Ethnicity**-a social group that shares a common and distinctive culture, religion, language, or the like

**Executive branch**-the branch of government that executes, or carries out the laws

**Expropriate**- to take possession of

**Faction**-a group within a larger group, party, or organization

**Federalism**- the belief that the nation should maintain a weak central government. Federalists believed that the political strength should be held by the individual states within Mexico

**Federalists**- believed in the philosophy of federalism

**Fixed society**-a person cannot move up or down from their social class

**Globalization**- world wide integration and development

**Gross Domestic Product**-(GDP) measures the total output produced within a country's borders - whether produced by that country's own local firms or by foreign firms

**Gross National Product**- (GNP) measures the output generated by a country's enterprises whether located domestically or abroad

**Guerrilla**- member of a band of non-regular soldiers that uses hit-and-run tactics to harass the enemy

**Guerrilleros**- fought in the Mexican Revolution and had no uniforms, no military discipline, survived off the land

**Haciendas**- great agricultural estates held in private hands

**Hereditary**-passing from parent to offspring

**Heretic**- a person who rejects their faith

**Huitzilopochtli**- (Hummingbird on the Left)-Aztec god of war and sun who was the Aztec supreme deity

**Indigenous**-a people native to a particular land

**Infrastructure**- fundamental facilities that serve a country or city such as transportation and communication systems

**ISI** (import-substitution industrialization)-an economic policy which favors replacing foreign imports with domestic production

**Judicial branch**-the branch of government that interprets the laws of a nation

**Legislative branch**- branch of government that contains the congress and makes the nations laws; usually elected by the people

**Ley Iglesias**- forbade the church from charging high fees for giving sacraments

**Ley Juárez**- made the military and church stand trial in civil court

**Ley Lerdo**- cut back on the amount of land the church could own

**Lone Star Republic**- the nickname of Texas as it became its own nation after achieving independence from Mexico

**Maize**-corn

**Maquiladoras**- partial assembly plants along the Mexican-U.S. border

**Mercantilism**- economic system where the purpose of the colony was to make the mother country stronger and more self-sufficient

# Glossary

**Merchant**-a person who buys and sells goods

**Mercenary**-professional soldier who is hired to fight

**Mesoamerica**-the era of Central Mexico and parts of Central America where many indigenous tribes lived before the arrival of Europeans

**Mestizaje**- racial mixing

**Mestizos**-usually a mix of Spanish and Native blood

**Mexicanidad**-Criollo celebration of their native culture

**Mexicanos**-A term that Criollos began calling themselves

**Monopoly**- exclusive control of a service

**Monroe Doctrine**-statement by President James Monroe forbidding any further colonies being formed in the Americas

**Mounted**-soldiers that are on horseback

**Narco-Trafficking**-the buying and selling of illegal drugs

**NAFTA**- North American Free Trade Agreement; trade deal between Canada, the U.S., and Mexico

**Nepotism**- favoritism on the basis of family relationship

**Noche Triste**, or “**Night of Sorrow**”- July 1, 1520, Cortès and his men were forced to flee the Aztec capital. Cortès lost 450 men, 4,000 Indian allies, and 46 horses

**Nobility**-persons of the upper class with a distinguished rank or title

**Nomadic**-a people who do not live permanently in one place but move around

**Ollama**-a game played by the Maya using a rubber ball in which the participants attempted to get the ball through a ring

**PEMEX**- Petroleos Mexicanos; a state-owned company that held a monopoly over the Mexican oil industry, and banned all foreign oil companies from operating in Mexico.

**Peninsulares**-people born in Spain but living in and ruling Mexico

**Peones**- the poor common folk of Mexico who usually worked on haciendas

**Plan de Veracruz**- Santa Anna's plan to overthrow Iturbide and declare Mexico a republic

**Plan of Iguala**-the plan designed by Iturbide to overthrow Mexican rule. It contained the Three Guarantees

**Positivism**- emphasized the economic development of a nation and the building of a strong central state

**Precedent**-an example set that others will follow

**Predetermined**-determined beforehand

**Protective Tariff**-a tax placed on imported goods in order to encourage the purchasing of domestically produced goods

**Remittances**- money sent back to Mexico by an immigrant

**Repartimiento**- a system of forced labor that replaced the encomienda system. Under this system, each adult Indian male had to contribute 45 days of labor a year, usually a week at a time

**Republic**- a nation in which the citizens vote for representatives to run the nation

**Republican**- favoring a republic

**Rubber stamp**- when congress passes laws easily and willfully that are proposed by a leader

**Rurales**- a group of mounted and heavily armed military guards

# Glossary

**Siege**-surrounding a city or fortified location in order to ensure no supplies enter and to weaken its defenders

**Smallpox**-a highly contagious disease; cause of death for many Native Americans

**Soviet Union**-a former communist, federal union of several countries comprised of the former Russian Empire

**Surplus**-a quantity greater than what is needed

**the grito de Dolores**-Speech given by Father Hidalgo to inspire the people to rebel against Spain

**Treason**- act or attempted act to overthrow one's own government

**Treaty of Guadalupe Hidalgo**- treaty between the U.S. and Mexico that brought an end to the Mexican-American War and cost Mexico nearly half its territory

**Tribute**-an enforced payment

**Tyranny**- an unjust or severe government or ruler

**Yankeephobia**- fear of America and its culture

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<sup>2</sup> Christopher L. Salter, *The Americas* (Orlando: Holt McDougal, 2012), 15-16.

<sup>3</sup> Jürgen Buchenau, *Mexican Mosaic: A Brief History of Mexico* (Wheeling, IL: Harlan Davidson, 2008), 11.

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<sup>6</sup> Chávez, 21.

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<sup>8</sup> *Ibid.*

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<sup>10</sup> *Ibid.*, 22.

<sup>11</sup> Buchenau, 11.

<sup>12</sup> Meyer, Sherman, and Deeds, 11-12.

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<sup>15</sup> Meyer, Sherman, and Deeds, 13.

<sup>16</sup> Buchenau, 11.

<sup>17</sup> Chávez, 22.

<sup>18</sup> Salter, 18.

<sup>19</sup> Meyer, Sherman, and Deeds, 14, 16.

<sup>20</sup> *Ibid.*, 43.

<sup>21</sup> *Ibid.*, 45.

<sup>22</sup> Buchenau, 12.

<sup>23</sup> Meyer, Sherman, and Deeds, 45.

<sup>24</sup> *Ibid.*, 46.

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<sup>26</sup> Meyer, Sherman, and Deeds, 46.

<sup>27</sup> Buchenau, 12.

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<sup>29</sup> *Ibid.*, 68.

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<sup>32</sup> *Ibid.*, 58.

<sup>33</sup> *Ibid.*, 59.

<sup>34</sup> *Ibid.*

<sup>35</sup> *Ibid.*, 59-60.

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<sup>39</sup> *Ibid.*, 54.

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<sup>45</sup> Meyer, Sherman, and Deeds 80.

<sup>46</sup> Buchenau, 18.

<sup>47</sup> Meyer, Sherman, and Deeds, 80.

<sup>48</sup> *Ibid.*, 80-83.

<sup>49</sup> Chávez, 32.

<sup>50</sup> Meyer, Sherman, and Deeds, 85.

<sup>51</sup> *Ibid.*, 87.

<sup>52</sup> Buchenau, 20.

<sup>53</sup> *Ibid.*, 21.

<sup>54</sup> Meyer, Sherman, and Deeds, 88.

<sup>55</sup> *Ibid.*, 89.

<sup>56</sup> *Ibid.*, 91.

<sup>57</sup> Meyer, Sherman, and Deeds, 91.

<sup>58</sup> *Ibid.*, 92.

<sup>59</sup> Buchenau, 21.

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<sup>60</sup> Meyer, Sherman, and Deeds, 96.

<sup>61</sup> Buchenau, 19.

<sup>62</sup> Meyer, Sherman, and Deeds, 128.

<sup>63</sup> *Ibid.*, 131-132.

<sup>64</sup> Chávez, 38.

<sup>65</sup> Buchenau, 21.

<sup>66</sup> Meyer, Sherman, and Deeds, 99.

<sup>67</sup> Meyer, Sherman, and Deeds, 129.

<sup>68</sup> *Ibid.*, 131.

<sup>69</sup> Buchenau, 22.

<sup>70</sup> Meyer, Sherman, and Deeds, 134-135.

<sup>71</sup> *Ibid.*, 142.

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<sup>73</sup> Chávez, 37.

<sup>74</sup> *Ibid.*, 38.

<sup>75</sup> Meyer, Sherman, and Deeds, 154.

<sup>76</sup> *Ibid.*, 147.

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<sup>80</sup> *Ibid.*, 159.

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<sup>82</sup> Meyer, Sherman, and Deeds, 159-160.

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<sup>86</sup> *Ibid.*, 162.

<sup>87</sup> *Ibid.*, 164-165.

<sup>88</sup> Buchenau, 32.

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<sup>90</sup> Buchenau, 33.

<sup>91</sup> Buchenau, 33.

<sup>92</sup> *Ibid.*

<sup>93</sup> *Ibid.*

<sup>94</sup> Meyer, Sherman, and Deeds, 211.

<sup>95</sup> Buchenau, 38.

<sup>96</sup> *Ibid.*, 37.

<sup>97</sup> Meyer, Sherman, and Deeds, 222.

<sup>98</sup> Buchenau 40.

<sup>99</sup> Meyer, Sherman, and Deeds, 224.

<sup>100</sup> *Ibid.*

<sup>101</sup> Buchenau, 42.

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<sup>104</sup> Buchenau, 43.

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<sup>107</sup> *Ibid.*, 227.

<sup>108</sup> *Ibid.*, 229.

<sup>109</sup> Buchenau, 44.

<sup>110</sup> Meyer, Sherman, and Deeds, 234.

<sup>111</sup> Buchenau, 45.

<sup>112</sup> *Ibid.*, 46.

<sup>113</sup> *Ibid.*

<sup>114</sup> Meyers, Sherman, and Deeds, 244.

<sup>115</sup> Buchenau, 46.

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<sup>117</sup> Buchenau, 48.

<sup>118</sup> *Ibid.*

<sup>119</sup> *Ibid.*, 49.

<sup>120</sup> *Ibid.*

<sup>121</sup> Meyer, Sherman, and Deeds, 247.

<sup>122</sup> *Ibid.*, 249-250.

<sup>123</sup> Chávez, 117.

<sup>124</sup> Meyer, Sherman, Deeds, 249.

<sup>125</sup> Chávez, 135.

<sup>126</sup> Buchenau, 49.

<sup>127</sup> Meyer, Sherman, and Deeds, 250.

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