STUDY GUIDE

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“The Mexican Revolution” by Michael J. Gonzales

For IB History HL Paper 3
Chapter 1: General Porfirio Diaz and the Liberal Legacy

1A. Political Consolidation
- Porfirio Diaz had strong ties with the US that caused and enabled many American imperialists to try and take control of Mexico.
- Britain helped develop oil fields in Mexico, and other countries in Europe also contributed to Mexican development.
- Diaz was successor to President Juárez, who was immensely popular among the people, and was subsequently re-elected constantly.
- Diaz appointed political allies as governors of all the states to tighten his hold on the people.
- During his tenure, Diaz’s economic policies had managed to pay off all of Mexico's foreign debt.

1B. Economic Development
- The construction of railroads resulted in Mexico improved communications with governors, military commanders, and other officials also helped create a modern state.
- The railroad became an instant economic success nationwide, and contributed to the formation of a global economy because it distributed goods between countries and funneled surplus capital from industrial nations to developing nations.
- Diaz got foreign investors by offering them tax breaks, enhanced police protection, and sometimes land.
- Although these actions helped encourage massive capital investment and promoted development, it also increased foreign control over key sectors of the Mexican economy.
- Many of the elites believed that what was good for them was good for all of Mexico, and expressed little concern for the lower classes. Many peasants were displaced looking for work and land.

1C. Agriculture
- The transformation of agriculture was led by Mexican businessmen. These changes occurred as provinces were brought together through railroads and overseas demand for agriculture brought banks, merchants and hacendados into the capital.
- Peasant resistance was difficult when much of the federal government devoted its power to support President Diaz’s campaign in suppressing the revolution.
- In the 1840s, the Yucatan Maya Indians tried to rebel against the local elites in a conflict known as the “Caste War”. It ended in the death of 300,000 Maya, who were now enslaved and forced to work on the land that the elites had confiscated from them.
- The Porfiriato committed to economic modernization without alteration of pre-modern social relations of production or concepts of justice. Many peasants were recruited by labor contractors, sometimes made to sign contracts while drunk or convinced that they were going to receive fair wages.
- “Rancheros saw their autonomy threatened by legalized actions of a government with obvious class interests. Their protests mounted and became more violent” (John Tutino, 45). The rising levels of discontent in Chihuahua made the city a popular center of revolutionary activity, eventually resulting in civil war.

1D. Mining and Industry
- The liberal ideology within Mexico promoted federalism, democracy as well as individual rights.
- President Juarez had ditched many of the principles of the liberal ideology in order to consolidate his own control over the presidency. He also increased authority in the central government, promising electoral victories, which was achieved by purposefully stuffing the ballot boxes.
- General Porfirio Diaz had served in the army under President Benito Juarez and helped to drive off the French during the Franco-Mexican War, ultimately executing Maximilian I, the French-installed
Emperor of Mexico. He rebelled following Juárez’s decision to run for re-election in 1871, beginning the Revolution of La Noria.

- The rebels were at a disadvantage, however after the death of Juárez due to a sudden heart attack, the fighting came to an end. Diaz became the dictator of Mexico since he assumed office in 1876.
- Diaz created political and economic disorder that made Mexico vulnerable to foreign invasion and territory loss. His tactics included violence, centralization of authority, and electoral fraud that allotted him authority, allowed him to remain as President, and also enabled political stability in Mexico.
- Diaz triggered the development and growth of commercial agriculture by passing policy that allowed village land to be acquired and adopted other policies such as high tariffs and restrictive labor practices.
- Diaz relied heavily on loyalty, and appointed and dismissed those federal judges who qualified or didn’t qualify his loyalty standards.
- The flourishing mining economy had created a highly visible group of foreign capitalists (mostly American), who received exclusive special accommodations from the Mexican government.
- Commercial agriculture expansion occurred at the expense of the peasant landowners, the development of the mining and industry enabled the foreign control over some key sectors of the national economy and the political stability.

**Chapter 2: Crisis and Revolution**

2A. Economic Crisis, Political Crisis, Francisco I. Madero and the Mexican Revolution

- Due to declining export revenue, Mexico was left with no money to import food from other countries. The country couldn’t grow its own because all of the land was being used to farm cotton, sugarcane, and henequen, which were no longer profitable.
- Lower-class Mexicans were threatened by malnutrition and starvation.
- Favoring the interests of foreign companies over the Mexican people, Diaz had empowered them to the extent that they were more powerful than the government. **Example:** In 1906, Rio Blanco workers went on strike against French mill owner Garcin. Diaz called strikers and management to Mexico City to discuss a compromise. When Garcin refused to hold up his side of the deal, disobeying government orders, Diaz still sent troops to kill the strikers, showing that powerful foreign corporations could do whatever they wanted and still count on government backing.

**Political Crisis**

- Diaz was aging, and continued presidency would require the naming of a successor, which Diaz refused to do. Various prominent political figures recognized that Mexico was ready for a party system.
- Diaz stated he would not run for re-election in 1910, though after people got excited, beginning to organize political clubs and announce candidacies for office, he ended up opting for re-election.
- Francisco Madero had a personal fortune earned through managerial skills to bankroll his campaign, a family pedigree that gained credibility with the elite, and a good reputation with workers. He ran against Diaz, and posed a serious threat. Thus, Diaz had him arrested just before his rigged re-election.

**Francisco I. Madero and the Mexican Revolution**

- Upon his release, Madero released the “Plan de San Luis Potosí”, a call to arms demanding political reform, sidestepping the social and economic concerns of peasants, workers and nationalists. It annulled Diaz’s re-election and declared Madero provisional president.
- The plan Madero issued barely mentioned land reform, which was a burning issue for many Mexicans. Instead, it proposed to right the wrongs done to Mexican landowners through proper legal channels rather than a social revolution.
- It became clear that Madero intended to fix up the system rather than overthrow it, disappointing land-hungry peasants and unsettling the revolutionary coalition.
2B. The Nation Responds

- Madero received much support from rebel groups after his failed election. He began a Mexican Revolution though ultimately it did not produce many results.
- He moved to New Orleans in fear of being captured by Díaz’s forces, while unconnected rebel forces kept the revolution alive without him. During this time rebels raided villages, attacked federal troops, and grew in size, while the Díaz regime was being bombarded by propaganda attacks.
- The revolutionary activity along the U.S.-Mexican border startled the Taft administration and 20,000 U.S. troops were sent to the Rio Grande. Díaz mistook this as support from the U.S., though President Taft did not support the Díaz regime. The rebels continued to grow as villagers joined the cause.
- Successful rebel raids and attacks on villages, plus the rise of both Emilio Zapata and Pascual Orozco caused Madero to return to the country in order to join in the revolution in person. His ideas were different from the other rebel leaders—he often complicated his fellow revolutionaries’ plans.
- Despite these setbacks, the revolution remained strong and weakened the Díaz regime. In an attempt to please the rebels, Díaz fired some unpopular governors and cabinet members, and gave the vice president a leave of absence. This was seen as a sign of weakness to the rebels, who continued fighting.
- Madero established a revolutionary government that did not include Orozco in the cabinet—an action that Orozco would never forget or forgive. Social unrest in the country hastened the signing of a peace treaty between the rebels and the Díaz regime, which would prove to favor welfare of the elites.
- Madero made little effort to make any major political reforms, startling many revolutionaries. He and the guard worked to stabilize the country and told his followers that land reform would have to wait.
- After the peace treaty was signed, violence and vengeance spread throughout the revolutionaries, who began to seek those who had oppressed them. This greatly worried Madero, who then used federal armies along to quell the conflicts. Miners and social activists became disappointed in the lack of support they received from the Maderistas and began to strike and fight back against the government.
- Madero faced more problems in the countryside. He ordered land disputes to be settled in court, angering many who had supported him in the hope of proper land reform.
- Zapata demanded that Madero commit to land reform, but Madero insisted the conflicts over land be settled in court, only angering Zapata more. Zapata and his forces retreated to the mountains as Madero ordered federal troops to attack them, in an effort to get rid of Zapata once and for all.
- As the election grew closer, an unexpected amount of candidates declared themselves a part of the election, but Madero still won in a landslide. Congress was split into more than one majority.
- Once he assumed power, Madero put many former elites into power and assigned many of his family members cabinet positions. Disappointed with and greatly angered by Madero’s actions, many of the rebels that had supported him now began to threaten him, planning (and eventually acting to) overthrow him if he refused to make the political changes they demanded.
- Orozco helped lead the revolt, advocating for the same things the original revolution had fought for which Madero had failed to deliver, along with new ideas such as restrictions to child labor, improved wages and working conditions for workers, and nationalization of railroads and the labor force. He posed a large threat to Madero, who offered to negotiate, but Orozco declined.
Chapter 3: Counterrevolution

3A. Huerta in Power
Francisco I. Madero relied heavily on the federal army to consolidate his power. This solidified military control over the country, however it left political holes that were filled by opportunistic counter-revolutionaries. The counter-revolutionaries came from various backgrounds, including the army, the Porfirian regime, and from Madero’s revolution. During Madero's tenure, there were three leading revolutionaries: General Bernardo Reyes, General Felix Diaz, the nephew to the disposed dictator, and General Victoriano Huerta, Madero’s lead general against the counterrevolutionary movement, who had his own political ambitions.

The Coup Against Madero
- Both Bernardo Reyes’ political campaign and a coup attempt in 1912 was a failure. He was subsequently arrested and incarcerated in Mexico City.
- General Felix Diaz had the tentative support of some of the Mexican elites. They supported him with the hopes that he would reinstate the strict social and economic policies that allowed for high industrial production and low operating costs. Both Reyes and Diaz escaped prison and launched an assault on the presidential palace. Reyes was killed, however Diaz survived.
- Huerta was placed as the commander of the federal forces in the city after being released from prison.
- Huerta then negotiated with Diaz while a mock battle was waged (la Decena Tragica). After an agreement was reached they joined forces, drafted a government with the help of ambassador Henry Lane Wilson and then overthrew Madero.
- Madero and his vice president were promised safe passage out of Mexico, however their death was arranged by Huerta. Madero and his Vice president were killed in the “crossfire” as they drove between Madero’s house and the prison. With Madero dead, Huerta began to consolidate his power through brute force and negotiations.
- Huerta was an unpopular leader--most of his monetary and political support came in from overseas business. Huerta’s policies were representative of the U.S. friendly dictatorships of the time.

US Involvement
- President Taft sent battleships to protect the oil fields near Tampico.
- Recently elected president Wilson was opposed to any military or political intervention.
- U.S. Ambassador Henry Lane Wilson helped Victoriano Huerta and Felix Diaz draft a government and the plan to impose it.

3B. Wilson’s Gambit
- There was much uncertainty about General Victoriano C. Huerta when he came into power, in Mexico and abroad. While most countries had already recognized him as the legitimate leader, President Wilson was remained opposed in spite of encouragement from U.S. business, seeing the dictator he was.
- Huerta responded the lack of U.S. support by leading an anti-U.S. propaganda movement in Mexico. He also became progressively more oppressive of opponents, and soon abandoned his democratic façade, assassinating political opponents and working to control the media.
- Congress began to oppose Huerta following his authorization of the murder of an outspokenly opposed senator. Eventually Huerta had had enough, and issued a decree abolishing Congress and ordering the arrest of all Senators he saw as opponents, which led to the arrest of 101 legislators.
- Though he became increasingly oppressive, he still had great support in the clergy, the military, the land-barons, and Great Britain, all of whom favored a dictatorship like Porfirio Díaz’s for personal gain.
- However, under pressure from the US, Britain changed its policies and abandoned Huerta.
Wilson tried to make plans with Carranza, the anti-Huerta leader, to aid in a military overthrow of the dictator, but Carranza refused to make alliances with the US that might put him in their debt.

After a fairly minor incident in which a few US sailors were briefly detained by the Mexican military, Wilson received congressional approval to invade Mexico, planning to use it to weaken Huerta’s regime and encourage a revolt. He sent troops that quickly overpowered Huerta’s local forces and took control of Veracruz, Mexico’s main port, causing many civilian casualties and widespread criticism.

Wilson kept trying to coerce Carranza to cooperate and join forces against Huerta, but this only strengthened Carranza’s resolve to avoid the US like a plague. He could not overthrow Huerta alone without looking like a warlord, and realized Carranza would never accept aid, thus he withdrew US forces from Veracruz, but left a large cache of arms which the rebels would use against Huerta.

Wilson sent US troops to defeat the Villistas, but these troops clashed with Carranza’s army, which increased both Villa’s popularity and anti-Americanism within the country. He knew that a larger scale intervention in Mexico was probable, but he sought the approval of Carranza before attacking Villa. Carranza stopped just short of giving his formal approval, allowing for maneuverability should things go wrong.

Despite their best efforts, American troops couldn’t capture Villa, and anti-American sentiment only increased. Carranza finally insisted that the American forces leave, but Wilson refused.

The clashes between the US and Carranza ended with many dead on both sides, and Wilson finally consented to withdrawing from Mexico. What had been meant to punish Villa increased his popularity and damaged Washington’s relationship with Carranza.

Chapter 4: Northern Revolutionaries and the Fall of Huerta

4A. Venustiano Carranza, Constitutional Movement, The Sonorans

Huerta almost became the legitimate president because most political elites valued stability and the protection of private property over reform.

Carranza

Venustiano Carranza was born into a rich family with a massive estate in the Coahuila province. Family connections allowed him to rise to power under Diaz, running for governor of Coahuila in 1908. His candidacy was shot down by Diaz for various political reasons.

Carranza held a grudge against Diaz, and backed Madero in 1910. He followed Madero into exile in San Antonio, and joined his revolutionary junta. Madero instated Carranza as governor of Coahuila, where he improved public health regulations and supported public education. Carranza also rigged elections, gave his friends powerful positions, and supported hacendados in their disputes with peasants. He also taxed and restricted foreign companies more heavily.

After Huerta assassinated Madero, Carranza issued the Plan de Guadalupe, which rejected Huerta and named Carranza interim president and “first chief” of the Constitutionalist army. The plan said nothing about social reforms, which made it difficult for Carranza to recruit an army from the Coahuilan peasants. His lack of military power allowed Huerta’s armies to drive Carranza back into the nearby state of Sonora, where the anti-Huerta movement became concentrated.

The Sonorans

Sonora was traditionally isolated from the rest of Mexico until the late 1800s when foreign investments in mining and commercial agriculture caused an economic boom.

Sonoran elites become wealthier and more powerful, beginning to rebel against the state’s authoritarian government. Many of these Sonorans supported Madero.
Peasants supported Madero because they hoped he would follow through with his promises of reforms. The wealthy Maderistas were, for the most part, simply seeking more power.

The Sonoran army saw little action during Madero’s revolution, but became distinguished for their high pay and professionalism, as well as the brilliant leadership of General Alvaro Obregon.

After the fall of Diaz, Maderista elites took power in Sonora without many changes to the government bureaucracy. Sonoran miners had a history of restlessness, and had been brutally oppressed under Diaz. Various strikes throughout 1912 were put down by the Maderista government.

Resistance against Huerta

- The Sonoran Maderista government considered recognizing Huerta to preserve economic stability, but was forced to denounce him after militant action by peasants and miners, who believed Huerta would bring about a military dictatorship. The Sonorans joined Carranza’s Constitutionalists, providing him with a powerful army under Obregon. Together, they quickly drove Huerta’s forces out of the region.
- Carranza gained considerable prestige by settling serious disputes between the Sonoran elites and Obregon. The compromise fell apart quickly, and the Sonoran governor, after arguing with Carranza, began to reach out to Pancho Villa.

4B. Pancho Villa, Abraham Gonzales, and the Revolution in Chihuahua

- In Mexico, conservative social rules conflicted with peasants intending to take over land held by the elite and wealthy. The political leadership of Carranza was supported only through mutual hatred of Huerta, as Carranza’s own vision was muddied with many clashing revolutionary viewpoints coupled with still traditional ideals.
- The revolutionary Pancho Villa was united with Carranza in a temporary alliance, the makeshift marriage of a “dashing cavalryman and popular leader” with a “shrewd politician”. The revolution in Chihuahua rose from sweeping discontent regarding “centralization of political and economic control” among townsmen, rancheros, and peasants, who no longer had any connection to the elitist government.
- Abraham Gonzalez was a political organizer and advisor to Madero, who was later appointed governor of Chihuahua. He won much respect from the larger yet underrepresented population in Chihuahua for his many reform efforts, including those regarding labor disputes, taxes, and unfair wages.
- After facing many political problems, Huerta’s victory over Orozco increased the general’s prestige and power at the expense of Governor Gonzalez and Madero. There was much tension between all parties involved, an overwhelming amount of hatred directed towards Huerta by all (esp. Villa & Gonzalez).
- As federal troops still controlled Chihuahua after Madero’s ousting, Gonzalez was arrested on “trumped up charges”, which was followed by his execution. Huerta denied any involvement. Despite Gonzalez’s death, the revolution continued in Chihuahua, sustained by Villa’s clever and effective fashioning of a formidable army from vaqueros and peasants. It defeated Huerta’s forces in various military victories.
- A criticism of Villa’s army was their targeting of “innocent minorities associated with the old regime as well as others whose only sin was economic success”, victims included members of the Chinese, Spanish, and Mormon communities for no particular reason and without trial.
- However, as Villa and his men grew stronger, he broke ties with and openly opposed Carranza, making him “virtually independent from outside political control”. Along with Villa, Carranza also had trouble controlling other revolutionary leaders, such as Emiliano Zapata (another Huerta hater).
- In response to the revolutionaries, Huerta’s men resorted to burning villages and deporting peasants suspected of rebel leanings. Huerta informed an audience that “he would have resort to extreme measures, for the government is going to depopulate the state, and will send to your haciendas other workers” (Huerta generally disliked his dissidents and wanted them to die).
- Huerta was caught in a “pincers movement” when Zapatistas were controlling the South and Villistas were taking power in the North, which brought his regime to the verge of collapsing.
• Because of this, representatives of Carranza and Villa met to discuss “the transition of political power in Mexico”, among other future plans, however Carranza proved to be very difficult in his refusal to endorse agrarian or labor reforms.
• Villa soon defeated Huerta’s troops at Zacatecas in the very successful final attack, which “ended all conservative hope for the restoration of the old regime”. Huerta soon fled the country for Jamaica.
• Because of some delay on Villa’s part, the army to first reach the capital was that of General Alvaro Obregon, who went on to sign an armistice with officials that ended hostilities, preventing groups like the Zapatistas from pushing northward.

Chapter 5: Power Struggle

5A. The Convention of Aguascalientes, Hostilities
• The struggle against Huerta had allied Zapata and Villa under the banner of agrarian reform. Carranza and Obregon allied for a strong central government that would modernize the economy.
• After Huerta’s defeat, differences caused problems and caused the failure of the Convention of Aguascalientes. Each of the four revolutionary leaders sent delegates on their behalf--Obregon was the only one present. The delegates couldn’t agree on anything because each leader represented something different. Each leader desired power for themselves, as well as the public’s acceptance of their ideas.
• Between 1914 and 1915 Villa and Carranza worked to expand their political and military bases in preparation for imminent confrontation. Obregon and Carranza declared formal war on Villa in 1914. They showed superior political and organizational skills and developed a clear political strategy that centered around nationalism and social reform that they calculated to win the support of workers, peasants, and the middle classes. They were also supported by the Constitutionalists.
• Villa was supported by the northern peasants and ranchers who wanted agrarian reform.
• Villa and Zapata made a military arrangement on the basis of their shared dislike of Carranza.
• The Zapatistas and Villistas lead a successful campaign against Carranza for a while, but their relationship soon deteriorated because they had different ideals. This gave Obregon the opportunity to occupy Puebla and Mexico City. The capital had little military value, but held symbolic significance.
• The industrialization of Mexico City under Porfiriato had created a proletariat eager to improve working conditions, which Obregon and Carranza supported.
• Obregon and Villa clashed in the decisive battle of Celaya, which lasted four months. Villa outnumbered Obregon, but Obregon anticipated his tactics and withstood the larger army. This changed the direction of the revolution as Villa, who had seemed invincible, suffered his first major defeat.
• Villa retreated to Leon and the battle continued there. A month later, the series of battles resulted in the decimation of his army, with heavy casualties on both sides. Obregon suffered from a near fatal wound and attempted to shoot himself, but was unsuccessful and was rushed to the field hospital, leaving his staff in charge of the battle.
• Obregon’s victories over the famed Villa virtually assured that the Constitutionalists would govern Mexico and greatly increased Obregon’s chances of becoming president himself. The Constitutionalist army attempted to enforce peace over war torn provinces and the many revolutionary movements.
• Faced with defeat, Villa retreated to the Chihuahua’s mountains and reverted to guerrilla warfare, despite his popular appeal. Villa did manage to regroup and take control of the northern provinces Chihuahua and Sonora, forcing U.S. President Wilson to reconsider his support of Carranza, now that it was shown he had difficulties controlling all of Mexico.
Chapter 6: Carranza in Power

6A. The Constitution Convention, Old Scores, Sonorans in the Yucatan

- After the Revolution against the dictator Victoriano C. Huerta, one of the leaders of the revolution, Venustiano Carranza, called for delegates across Mexico to assemble and write a new Constitution. Carranza was effectively in charge as first chief of revolution.
- There were two main groups vying for influence during the Constitutional Convention. The moderate liberals (liberales carrancistas) held mild anticlerical views, believed in individuals rights, and wanted the same spirit as the Convention of 1857. The progressive liberals (jacobinos) were staunchly anticlerical, advocated state intervention for social and economic injustice, and held societal rights over individual liberties. Carranza was the most prominent moderate liberal, while important progressive liberals included General Alvaro Obregon, Francisco Mugica, and Pastor Rouaix, as well as to an extent Emiliano Zapata.
- Key issues during the convention include church-state relations, property rights, and agrarian reforms.
- At the heart of the church issue, both factions wanted to restrict the powers of the church, but the progressives wanted to take it a step further and give the government control in the church’s opposition to the government as well as who could become a priest (only native born Mexicans), they were also in favor of a national education system to dissolve the churches monopoly on that aspect of society.
- The constitution was passed February 1, 1917 and despite the differences between the two factions, the new Constitution was for the most part a progressive blueprint which gave the opportunity for major improvements for the lives of the poor and working.
- Zapata was in rebellion against the new government and when Obregon resigned as the secretary of War, Zapata encouraged him to join the rebellion, however Obregon did not. The rebellion floundered as the popularity of Zapata began to dwindle, up until his assassination ordered by Carranza.
- The Yucatan also rebelled, only this was a conservative rebellion against the Revolutionaries, started by wealthy landowners. As a response, Carranza sent General Salvador Alvarado to invade the rogue state and quell the rebellion.
- Alvarado quickly stopped the rebellion and then set about the consolidation of power for the government. He enacted several popular policies that mirrored the ideas and tactics of Obregon, forcing landowners to sell their property to a government operated marketing agency, in turn creating a near monopoly over henequen production. He advocated for workers rights, as well as government sponsored unions, although the unions came on the condition of support for the government.
- After WWII the price of henequen plummeted and Carranza, seeing it as an opportunity to remove a political rival, relocated Alvarado back to a desk job in Mexico City. However his reforms in the Yucatan had lasting effects.
- In 1920 Obregon ran for president with the backing of Alvarado’s Socialist Party, as well as the support of a new socialist movement led by Felipe Carrillo Puerto. Carranza was furious; he disbanded the Socialist Party, dissolved the Reguladora (the agrarian henequen reforms of Alvarado), and forced many of the leaders of the Socialists, or progressive liberals into exile. Planter signed contract with the US that were similar to those made pre-revolution.

6B. Carranza, Petrol Companies, Copper Companies, 1920 Presidential Succession Crisis

Carranza with Petroleum Companies:

- The petroleum industry in Mexico was mainly controlled by the U.S. and Britain. World War I increased a demand for petroleum which increased foreign involvement in Mexico, turning Mexico into a world leader for producing petroleum.
• Political leaders like Francisco Madero opposed the control that the petroleum companies had over Mexico and in turn demanded more money from oil producers through different means such as increased taxes and higher lease payments.
• Despite the oil companies’ attempts, both the U.S. and Britain were unable to interfere in Mexico.
• Carranza’s inability to take control of his country and deal with the petroleum companies diminished his power and limited his ability to enforce his policies.
• Carranza’s ultimate decision to grant the oil companies provisional drilling permits in 1920 only emphasized Carranza’s failure in his “war” against the multinational petroleum companies.

Carranza with the Copper Companies:
• Overseas companies also owned copper mining corporations in Mexico which, like the petroleum companies, resisted Constitutionalist movements to cut profits.
• Copper companies did not have a regional man like Manuel Peláez who prevented Constitutionalist movements for oil companies.
• In March 1915, Carranza and Plutarco Calles (a general and a politician) implemented many new taxes (mineral tax, corporate property taxes…), as well as found ways to nullify tax exemptions put in place during Porfirio’s time.
• The biggest mining company at the time was Cananea Consolidated Copper Company which was at the receiving end of major tax increases and loss of tax exemptions.
• Unlike the way that the petroleum companies eventually overcame Mexico’s attempts on increased taxation, Copper companies fell victim to the Sonoran revolutionaries and were ultimately at the mercy of Mexico.
• Huerta instituted many new work benefits during his presidency such as an eight hour work day, minimum wage, standardized work contracts, restrictions on the use of child labor, and also workers compensation. These became a part of the national Constitution.

The 1920 Presidential Succession Crisis:
• Carranza was willing to eliminate others from power but he was unwilling to leave himself.
• As the Mexican revolution was coming to a close, the need for new leaders (and a new president) was inevitable. The election process at the time was based on political support, not individual votes.
• General Alvaro Obregón (Secretary of War to Carranza) began to have presidential ambitions and his relationship with Carranza was beginning to diminish.
• Obregón traveled to Cuba, Canada, and the United States in hopes of creating an international name for himself for his inevitable run for presidency on June 1st, 1919. During this time, Carranza wallowed in the political distress of Mexico.
• The Sonorans proceeded to put into place the “Plan de Agua Prieta”, which essentially called for the Mexican people to overthrow Carranza. Many governors and caudillos joined Obregón and in the midst of the panic, Carranza fled to Veracruz.
• Carranza had hoped to plan a national campaign, in which he could take power again, however, the Constitutionals (who Carranza had helped start out) assassinated him on May 21, 1920.
Chapter 7: Alvaro Obregón and the Reconstruction of Mexico

7A. Obregon, De La Huerta, Morones, the Caudillos, Old and New

- Obregón believed that social and political reform should be pragmatic and not idealistic. Therefore many of his decisions as president were made based foremost on how much political influence each choice gave him.
- Mexico was the world's second largest petroleum provider during World War I. Obregón's attempts to raise taxes and increase government control over this industry was opposed by the U.S. and Britain.
- Obregón compromised by undermining the Mexican constitution that gave sub-oil rights to the Mexican people and that Obregón pay Mexico's financial debt to foreign powers. In return foreign relations stabilized and helped regulated Mexico's revolutionary state.
- Obregón attempted to reconcile with former rivals. He discussed land reforms with the Zapatistas that would gain him their favor while allowing some Porfrian Caudillos to return to Mexico and regain their businesses. The favor of important military officers was also garnered by financial benefits, yet rotating who they were in charge of so they could not personally gain military favor.
- Land reform was approached carefully to ensure political and economic stability. Reform was limited to areas that were politically beneficial and compromised with the old elites that the revolution wanted push out. The people of Chihuahua were very unhappy with Obregón's deals with the elite from both Mexico and the U.S. and staged many protests. The elite held on however using Obregón's allowance for their return to restart businesses and remain in power.
- Zapatistas were given a large quantity of land, however not as much as they expected. They were not allowed to stay on land that was occupied during the revolution and they could not keep or take land from hacendados. In replacement, Obregón created Ejidos, collective plots of land that were owned by one person but were divvied out to people, but not truly owned by them.
- In attempts to get land, many villagers would claim to be part of the revolution and forge signatures.
- Obregón's position on agrarian reform was highlighted in the reform law of 1922 where agrarian industries such as sugar plantations, could not be broken up. Workers on these plantations and industries were not allowed to receive land. This was done in order to maintain economic stability, however enraged many workers.
- Obregón gained laborer's support by working on labor reforms. This was done by making a covert alliance with CROM, the Confederacion Regional de Obreros Mexicanos, a moderate labor organization. He assigned CROM's leader Luis Morones a position in government and together lowered strike rates and layoffs. However, significant wage improvements were almost nonexistent. Wages were below 3 pesos, below the necessary amount for survival.
- Pancho Villa who refused to support Obregón during his power struggle against Carranza was pushed into a corner after Obregón's victory. A 100,000 peso reward was put out for Villa's arrest. Villa escaped to Coahuila after troops were sent to Chihuahua to detain him. Interim President Huerta began negotiations with Villa despite hesitation from Obregón. For Villa to back away from the public eye he was given a hacienda from Tomas Urbina, an escort, and land for his soldiers.
- Saturnino Cedillo in San Luis Potosi wanted land and higher wages for his villagers and demanded that Obregón provide. He was extremely outspoken and could either be a great ally or enemy to Obregón. Therefore Obregón had military-agrarian colonies established from land confiscated from haciendas. This land was distributed among the peasants by Cedillo. Obregón had gained Cedillo's loyalty.
- General Francisco Mugica was governor of Michoacan from 1920 to 1922. Land reform was fought over between the elites and workers. In 1922 as the battles did not end Mugica stepped down. Obregón replaced him with Emiliano Portes Gil, who opposed agrarian reform. However battles continued as the people continued to fight.
- Obregón had achieved relative political and economic stability. However this sacrificed the people's desire for land reform.
7B. Petroleum & Debts. The De La Huerta Revolution, the Assassination of Pancho Villa

- The economic expansion during the Porfiriato (when Porfirio Diaz was in power), focused on economic expansion by heavy dependence on foreign investment and overseas markets.
- This helped by creating preconditions for revolution and resulted in Article 27 of the new constitution, which gave subsoil rights to the nation.
- The United States and Britain demanded compensation for losses that happened during the revolution.
- Mexico was very profitable and convenient due to geographic proximity, low taxes, and proven reserves.
- The president recognized that oil represented Mexico’s principal hope for repaying its foreign debt and generating the revenues required for repairing infrastructures and underwriting future development.
- Mexico received overall very little income from oil.
- Oil companies informed Obregon that they wanted firm tax ceilings, freedom to continue wildcat exploration, and an end to “harassing” regulations.
- At the same time the more militant captains of industry asked Washington to intervene militarily in Mexico to protect their existing investments and future returns.
- Mexico agreed to pay its bonded debt, with sole exception of bonds issued by General Victoriano Huerta, by diverting tax revenues from both railroads and petroleum industries.
- Mexico pledged to privatize the railroads and to return them to prerevolutionary operating conditions, despite the enormous costs involved.
- By 1923 23 state governments, including Texas, New Mexico, Illinois, Maryland, and Wisconsin, had passed resolutions favoring normalization of relations with Mexico.
- The Mexican government reserved the rights to enforce “police regulations, sanitary regulations and measures for public order, and the right… to levy general taxes”.
- Petroleum producers feared nationalism under any guise and scaled back their Mexican operations, which cost Mexico millions of tax dollars.

The De La Huerta Revolt and the Assassination of Pancho Villa

- Treasury Minister Adolfo de la Huerta, who negotiated the one sided debt settlement with bankers, at one time appeared the favorite to succeed Obregon as president.
- De la Huerta’s disappointing performance as treasury minister, however, led the president to support Interior Minister Plutarco Elias Calles.
- This essentially guaranteed the Calles would become the next president since free elections for Mexico remained a noble concept.
- De la Huerta assumed, based on negotiations in New York, that he would be supported by the international banking community and the U.S. government.
- Villa stated that his pledge to stay out of politics would expire at the end of Obregon’s term, and that he was pondering a run for the governorship of Durango.
- Villa also boasted that he could raise an army of forty thousand men within forty minutes.
- Villas elimination cost de la Huerta a likely powerful ally and weakened his impending rebellion.
- De la Huerta launched his rebellion in December 1923 and many Villistas supported his cause.
- Obregon then personally assumed command of government forces and defeated the rebels.
- Obregon’s execution of rebellious generals removed dozens of potential political rivals who could have caused problems for the new president.
Chapter 8: Plutarco Elias Calles and the Revolutionary State

8A. Agrarian Reform, the Cristero Rebellion, Historical Background
- Sonoran Plutarco Elias Calles served as police chief, governor, and military commander of Sonora from 1916-1917.
- Calles replicated the measures introduced by Porfirio Diaz when he ordered the revolutionary army to attack the Yaqui Indians. He also created the Partido Nacional Revolucionario (PRN).
- He renegotiated the debt agreement with the United States, making it more favorable for Mexico, supporting development, public education, agrarian reform, and separation of church and state.
- Calles also increased the federal government's role in the national economy, as Mexico was hundreds of millions of dollars in debt internationally at this time.
- The redistribution (agrarian reform) of land among peasants and villagers strengthened political bonds.
- The Roman Catholic Church was Calles' main obstacle regarding a revolutionary state. The National Catholic Party (NCP) objected to Madero’s ideas and attacked his ideals, creating a state of rebellion.

8B. The Rebellion, “El Maximato” and the end of the Cristero Rebellion
- The labor-union movement sparked the renewed conflict between church and state.
- Calles refused to compromise which gave church leaders little choice between caving in to state control of religion or starting a full-scale resistance.
- In 1926, the Mexican Episcopate suspended public worship to get popular support for the church against Calles and Morones.
- The popular rebellion went against the government and made up the National League in Defense of Religion. It was composed of middle-class, urban professionals.
- The rebellion appeared to be a series of uncoordinated local protests against the revolutionary state.
- The Cristero Rebellion in San Jose began when the local civil commander from a neighboring town attempted to arrest the priest, Padre Federico. He escaped, leading the military to take its anger out on the town, and turned the entire community against the government.
- A popular man in Mexico named General Alvaro Obregon beat Calles in the election but before he could take office, he was assassinated. There was a lot of conflict and unrest with his assassination and what they were supposed to do afterwards.

Chapter 9: Lázaro Cárdenas and the Search for the Revolutionary Utopia

9A. The Education of a Revolutionary, Power Struggle
The Education of a Revolutionary
- Lazaro Cardenas was a young revolutionary involved in the Revolution and by 1934 he had climbed higher and higher in the ranks of the military and eventually gained tight ties with Calles. Cardenas was well equipped with above average political and military skills and great penmanship.
- During the Revolution, Cardenas was involved with the Battle of Agua Prieta and supported Obregon’s overthrow of Carranza. He was soon appointed colonel, giving him more military prominence.
- Cardenas was put to the test when Obregon ordered the assassination of his good friend Governor Mugica in 1922. Cardenas refused, and he bore no consequence as Obregon soon left power.
- In 1924 Calles took over as president after Obregon, and with his new presidency, he appointed Cardenas directly to Calles’ inner circle of political advisors. Cardenas worked as a military commander for the Huasteca from 1925-1928. By 1928 Cardenas was officially appointed by Calles as governor of Michoacan. As governor, he focused on land reforms nationalism and a holistic revolutionary approach to rebuilding the state. He created the Michoacan Revolutionary Confederation of Labor which was a local political force of support. It was made up of teachers with socialist views,
communists’ and members of agrarian league. This group was a driving force for fighting for his policies.

- Cardenas was concerned with the literacy rates and poverty in Michoacan and from 1928-1932 helped both with the distribution of land and the formation of communal land ownerships (ejidos) throughout Michoacan. This idea of ‘ejidos’ was the basis of Cardenas plans to liberate peasants.
- Cardenas became the voice of the underclass. He traveled all over the area spreading education and support for villages. He became looked at as almost a god and savior for the indigenous people.
- Cardenas became the president of the ‘Partido Nacional Revalucionario’ in 1930 and tried to spread support for it by traveling around Mexico. But he later resigned from the position and left Mexico City due to the high tensions between Calles and President Ortiz Rubio. These tensions lead to the election of Abelardo Rodriguez, who was supported by Calles.
- Cardenas was not involved with the election of Rodriguez, but soon became an ally of his and ended up being a strong part, once again, of the military. Rodriguez was powered by Calles due to Calles’s experience and in reality was ruling once again.

**Power Struggle**

- Toward the end of Rodriguez’s term, Calles needed to appoint a new president, with Cardenas ultimately taking this role. But Cardenas ended up running his campaign independently and worked to set aside his own political figure from Calles completely. Calles and Cardenas were tied, but as the vote leaned towards Cardenas, Cardenas increasingly wanted to be a truly independent president.
- Calles and Cardenas had very different views on the labor force, poverty, unions and working rights. As Cardenas wanted to move forward with labor rights, Calles wanted to keep them as they were.
- Cardenas replaced Calles’ supporters on the cabinet with revolutionary minds similar to himself.
- In 1936, protests in Mexico City broke out against Calles, demanding his removal, which was subsequently made possible by Cardenas when he exiled Calles to the United States.

**9B. Agrarian Reform, The Secular Revolution: Educational and Religious Reforms**

- Lazaro Cardenas focused on agrarian reform and aimed to destroy haciendas which owned almost all of the good land and worked to improve the standard of living for peasants. Cardenas implemented this plan, but interference from the church or government prevented it from being very successful.
- The divide over agrarian reform created a lot of hatred between those who supported it and those, typically businessmen or landowners, who did not. Violence and political manipulation only caused two of five haciendas to cede land to villagers (who would end up receiving small, inadequate plots).
- Although poverty slightly declined with the introduction of Ejidos system, the violence and economic pressure on the peasantry caused many to immigrate into the cities or across the border into the US.

**9C. Nationalism Ascending: Cardensa’s Expropriation of the Foreign Petrol Companies**

- In 1915, competition among unions to control the workplace weakened the movement and allowed foreign petroleum companies such as Royal Dutch Shell and Standard Oil of New Jersey to employ divide and conquer tactics to dominate Mexico’s petroleum industry. As oil improved Mexico’s market conditions, petroleum workers began to demand higher wages and job security.
- Cárdenas campaigned in 1934 on the issues raised by the Partido Nacional Revolucionario’s Six-Year Plan. He favored higher wages, increased export taxes, and the eventual nationalization of the petroleum industry.
- Nineteen separate petroleum workers’ unions merge to form the Sindicato de Trabajadores Petroleros de la República Mexicana and become affiliated with Vicente Lombardo Toledano’s CTM.
- Cárdenas intervenes a second time. He puts a board together to makes a recommendation to the Federal Board of Conciliation and Arbitration. The board, looking over taxes and other factors, decides to endorse the union’s demand for a $26.4 million peso pay increase and more control over the workplace.
• The foreign firms’ open defiance of Mexican law fired up Mexican nationalism and gave Cárdenas political support.
• In 1933 and 1936, the Roosevelt administration, out of fear of the rising anti-Americanism in Latin America renounced unilateral military intervention in the region.
• Cárdenas opposed fascism at home and abroad as antithetical to the Mexican Revolution and international socialism.
• Since the revolution, the United States’ attempts to influence the course of events in Mexico had mostly failed. Josephus Daniels, the US ambassador to Mexico, supported the requests of the unions.
• Oil executives believed Cárdenas would not expropriate (the process of taking property for a purpose deemed to be in the public interest, even though the owner of the property may not be willing to sell it) because it was believed that Mexico lacked the technicians to run a petroleum industry. They thought no one would buy Mexico’s oil, if the oil industry was run by Mexico.
• Washington was reluctant to pressure Cárdenas, which told the petroleum producers that they were on their own.
• The international context, particularly the Allied defense of self-determination against Nazi Germany, worked in Mexico’s favor.
• Cárdenas does not want to arrive at compromise between oil companies and unions (due to compensation issues), and decides to on March 18th over radio, to announce the expropriation with compensation of the foreign-owned petroleum companies. Standard Oil and Royal Dutch Shell organized a global boycott of Mexican petroleum and meddled in Mexican politics.
• Ambassador Daniels and Cárdenas were condemned by US media.
• The acts by the oil companies helped turn public opinion against Mexico. Mexico’s economy was hurt by a decline in tourism, export of oil, and specialized product production, plus the boycott. The expropriation increased Cárdenas popularity in Mexico and minimized the likelihood of a coup.
• Cárdenas’s bold defense of the national sovereignty had galvanized Mexican nationalism across class lines and geographical locations. Once WW2 started, Roosevelt thought Latin American solidarity should take precedence over compensation for the oil companies, thus the lift of the US boycott of Mexico’s silver and petroleum industry.
• Cárdenas selects Avila Camacho to be the PNR’s presidential candidate in the interest of political peace and stability. Avilo Camacho ultimately wins the presidential race as a competent moderate who favored business over labor.

Assessing the Impact of Expropriation
• Expropriation increased domestic demand for petroleum offset the the loss of the overseas markets, and also fueled revolutionary nationalism.
• Due to the depreciation of the peso, floundering agrarian reform, and skyrocketing unemployment, Cárdenas was compelled to choose a more moderate candidate for government.

The Corporate State & Caudillismo: The Mexican Revolutionary Party and Local Powers Brokers
• Shortly after Cárdenas announced expropriation, he started to reorganize the Partido Nacional Revolucionario (PNR) to incorporate defined sectors-workers, peasants, government employees, and the military into the governing party. It was renamed the Partido de la Revolución Mexicana (PRM).
• Specialized political organizations assumed responsibility for controlling each sector.
• The military’s inclusion was a political maneuver designed to limit its ability to undermine the system.


**Conclusion**

10A. Overview: Political Reform, Economic Nationalism, the Cultural Revolution

**Reasons for rebelling:**
- Many people rebelled because of land inequality. The landless wanted land, which in many cases had been theirs before hacienda owners muscled them off.
- Miners and textile workers wanted to unionize, higher wages, and better working conditions.
- Even up class Mexicans rebelled against Díaz. They did it because his regime was giving foreigners preferential treatment in the economy, and because they felt locked out of leadership positions in the government.

**Reforms:**
- Villa and Zapata were focused on land reform, and ended up clashing with the constitutionalists.
- Most radical land reform was enacted in 1934, although it was plagued by corruption.
- Foreign business owners had been allowed to become very powerful under Díaz.
- With the support of their own governments (largely the U.S.) foreign owned companies were able to resist labor reforms.
- The U.S. responded to Mexico nationalizing its petroleum industry by ceasing to import Mexican silver, a blow to the Mexican economy.

**Clash with the Church:**
- The constitutionalists were largely anticlerical.
- Churches were burned; priests were killed.
- The agrarian leaders (Villa and Zapata) were not so anticlerical.
- Secular school curriculum of new government clashed with religious ideology.
- Schoolteachers were used in an attempt replace Catholic saints, holidays, and traditions with secular ones.
- Some teachers were even killed.
- The Church lost most of its former power.

**Aftermath:**
- The PRI (a political party) remained in power from 1929 to the end of the 20th century, leaving the party largely indistinguishable from the Mexican state.
- Working class Mexicans remained impoverished.