

Chapter 1

Introduction

Defining the Revolution

France, 1789; China, 1911; Russia, 1917: in each case, a major revolution began which decisively and lastingly affected the national history of these countries; and the Mexican Revolution of 1910 played a comparable role in determining how 20th-century Mexico would develop. Indeed, one of the chief claims of this book is that—notwithstanding some recent revisionist scholarship which tends to deflate its significance—the Mexican Revolution deserves to be included among the world's 'great' or 'social' revolutions, certainly in respect of its domestic character and impact. (Clearly, its international role was less, compared to France, China, or Russia.) It was a 'great revolution' by virtue of the scale of the fighting, the intense popular mobilization it involved, and, over time, the changes it brought about; the outcome, therefore, profoundly affected Mexico, most obviously politically, but also socially, economically, and culturally. It was not yet another Latin American barracks revolt; nor was it a mere *fiesta de balas* (a 'carnival of bullets'), a meaningless 'tale of sound and fury signifying nothing'—except, as some obtuse essentialist interpretations propose, the congenital violence and machismo of the perverse Mexican psyche.

The start of the Revolution is conventionally, and correctly, dated to 1910, since the armed insurgency which overthrew long-time

president Porfirio Díaz began in that year. Of course, the causes of the insurgency, analysed in Chapter 2, were located in the past—some would say the distant colonial past. But my argument will focus on the long regime of Díaz: the 'Porfiriato', 1876–1911. The 1910 insurrection, which led to Díaz's fall a year later, began a decade of civil war, the first half of which—1910–15—witnessed mounting warfare, as guerrilla struggles and government counter-insurgency measures ('asymmetric warfare' in today's jargon) gave way to massive conventional campaigns, pitting, first, revolutionaries against the old regime (1913–14) and then revolutionaries against fellow-revolutionaries (1914–15). During these years, a liberal-democratic regime was briefly established under Francisco Madero (1911–13); and, following an army coup in early 1913, a counter-revolutionary military regime was set up under Victoriano Huerta (1913–14). Both experiments failed. Political stability and success would depend on a different strategy, one that was reformist, nationalist, scarcely liberal-democratic, but populist and inclusionary.

By 1915 the so-called Constitutional coalition had won; but they faced five more years of political instability, continued violence, and consequent economic dislocation. In 1920, the last successful rebellion of this decennial cycle brought to power a revolutionary faction who, through the 1920s, embarked on a successful project of pacification, state-building, and social reform. For some, therefore, 'the Revolution' ended in 1920; no subsequent armed rebellion succeeded and, by the standards of both contemporary Latin America and its own turbulent prerevolutionary history, Mexico entered a century-long period of unusual political stability, which, paradoxically though it may seem, was in good measure a product of the revolutionary upheaval of the 1910s.

As violence declined, state-building and social reform forged ahead: in the 1920s, the victorious 'Sonoran dynasty'—a clutch of revolutionary leaders from the dynamic north-western state

of Sonora—laid the foundations of state power, incorporating 'mass publics' into the new politics, and confronting challenges from within (dissident generals, the Church, the foreign oil companies) and from without (a suspicious United States and, after 1929, the economic body-blow of the Great Depression). In the following decade, as 'bottom-up' pressure for social reform, released by the armed revolution, combined with the 'external shock' of the Depression, the Revolution lurched to the left, especially as President Cárdenas (1934–40) embarked on radical policies of land and labour reform, 'socialist' education, and economic nationalism (which culminated in the expropriation of the Anglo-American oil companies in 1938).

We may therefore see the Revolution, in its totality, as the work of a generation (1910–40) who first destroyed the old regime, then built a new state apparatus and, finally, carried through social reforms unprecedented in Latin America at the time. After 1940, however, the old revolutionary generation—those who had survived—shuffled off the political stage; a new leadership took power, in the context of World War II and the Cold War; and a different project—urban, industrial, conservative, and pro-American in character—replaced the radical social reformism and nationalism of the Revolution. The latter lived on, in official rhetoric, iconography, and national ritual; but, as Mexico experienced its 'economic miracle' (c.1950–80), followed by the political and economic upheavals of the 1980s and 1990s, so 'revolutionary' claims sounded increasingly hollow, if not hypocritical. The old revolutionary banner was now brandished by the political opposition—radical students, leftist opposition parties, and the 'neo-Zapatista' rebels of Chiapas, in Mexico's deep south. The Revolution remained a source of ideas, images, and inspiration, but as a programme of government—as *la revolución hecha gobierno*: the 'Revolution-made-Government'—it was a thing of the past. Thus, when it comes to understanding the character and course of the Revolution, it is the generation

1910–40 which really matters: the decade of armed violence followed by two decades of institutional reform.

Debating the Revolution

Like any major revolution, the Mexican has been the subject of intense debate and disagreement, which show no sign of reaching closure. Recent historiographical arguments (Was it a real revolution? Was it genuinely popular? Did the revolutionary state enact the popular will or simply reward incumbent elites?) are, contrary to what some seem to think, as old as the events they seek to explain. Simplifying a complex topic, we can distinguish an old orthodoxy which depicted the armed revolution as a mass popular protest directed against a hated, oppressive, pro-foreign regime; and the ensuing *revolución hecha gobierno* as a genuine, and—at least partly—successful, attempt to satisfy popular demands by way of social and political reform. The Revolution was therefore popular, progressive, and patriotic.

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This was the official position of the ruling party—after 1946 the PRI (Partido Revolucionario Institucional: Revolutionary Institutional Party)—and while, as I have suggested, that position became increasingly untenable after the 1940s, it made a good deal of sense as an interpretation of both the armed insurgency of the 1910s and, with some qualifications, the institutional Revolution of the 1920s and 1930s. (A brief further clarification: the official view stressed continuity throughout the whole generation of 1910–40; but some critics, notably Marxist historians like John Womack, saw post-1920 trends as already displaying a derogation of early revolutionary aspirations, a clear anticipation of the systemic apostasy of post-1940.)

Throughout these three decades, outspoken critics and armed rebels openly opposed the Revolution: conservatives, who hankered after the Porfirian old regime; Catholics who saw the Revolution as a vehicle of godless radicalism and freemasonry;

liberals who denounced it for sacrificing early democratic hopes on the altar of populism and authoritarianism; and radical leftists who alleged that popular aspirations had been betrayed by petty-bourgeois careerists, revolutionaries in name only.

Academic research—that is, research claiming to rise above political partisanship and making a virtue of original archival work—came thick and fast from the 1950s on, chiefly in Mexico and the US. The mainstream view still tended to align with the old orthodoxy (of a popular, progressive, patriotic revolution), but from the late 1960s new revisionist interpretations emerged and, over the next generation, they substantially transformed historical interpretations of the Revolution. In this respect, the historiography of the Mexican Revolution resembled that of other 'great' revolutions (the English and French in particular), which were also being seriously rethought. Indeed, the new interpretations and the debates which they prompted display systematic cross-national similarities: a healthy shift away from national towards local and regional perspectives; a growing critique of Marxist and class-based—some would say class-reductionist—explanations; a renewed emphasis on state-building and 'political culture'; and, by the 1990s, a broader focus on 'cultural' themes, which included questions of gender, religion, and identity.

In the Mexican context, this meant questioning—and, in some cases, denying—the popular and progressive character of the Revolution, especially the *revolución hecha gobierno* (the armed insurgency of the 1910s could not be so easily revised away). Scholars now stressed multiple and often mercenary motives and, logically, they began to question the 'black legend' of the old regime, rethinking and even rehabilitating the role of the traditional villains of story (Díaz, Huerta). They also saw the popular mobilization of the 1910s as less extensive and certainly less successful than older 'orthodox' historians had; and, above all, they depicted the revolutionary state of the 1920s and 1930s as

corrupt, careerist, authoritarian, even totalitarian. The Revolution was a con trick perpetrated on a gullible, or simply unfortunate, people; the regime of the PRI was less a betrayal than a logical culmination of trends dating back at least to the 1920s if not the 1910s.

Again, these new revisionist critics belonged to different ideological camps (even if many were very respectable academic historians, who plied their trade in Mexico's rapidly expanding archives). Some, such as Enrique Krauze, stressed the betrayal of the Revolution's early liberal promises; some, among whom Jean Meyer was a commanding figure, reinterpreted Church-State conflict, inverting the old dichotomies and depicting the Catholic Church as popular, even progressive, and the revolutionary state as authoritarian and oppressive; while some, from the Left, extrapolated their critique of the contemporary PRI—an engine of political control and capitalist accumulation—back into earlier decades.

These interpretative shifts were powered, first, by trends within the discipline of history (local and regional research; a retreat from 'grand theory', especially Marxism; and cross-fertilization with other disciplines, such as anthropology and, later, 'cultural studies'); and, second, by events in the real world (globally, disillusionment with revolution as an agent of change, the decline of Communism, and the ensuing vogue for neo-liberal economic models; and, specifically in Mexico, the delegitimization of the ruling party after the 1968 repression of student protest and, even more important, the severe economic vicissitudes of the 1980s).

Whatever the causes, the current historiographical landscape—which some choose to call 'post-revisionist'—is much more complicated than that of fifty years ago. While research has become more refined and detailed, it has resulted in a fragmented picture, in which the Revolution—once the great monolith of Mexican politics and (orthodox) historiography—has been shattered

into myriad shards. For some—revisionist critics of the Revolution—this is a welcome outcome: the old orthodoxy, which had underpinned the official party for decades, is thus blown to bits. (An outcome which is rather more relevant since the PRI, after twelve unprecedented years out of power, recovered the presidency in 2012.) Also, some historians, for whom 'complexity' is a major intellectual finding (rather than a statement of the stunningly obvious) and 'contingency' is a tediously recurrent mantra, this kind of historical 'splitting' is intellectually congenial. The alternative—'lumping' the data into bigger interpretations—is a thing of the past, a relic of defunct 'grand theory' which, thanks to Foucault et al., we are told, has been tipped into the dustbin of historiography.

While it might be possible to write a *Very Short Introduction* on these terms—a denial of big interpretations, an endless splitting of data, 'one damn thing after another'—it would not make much sense, nor, more importantly, would it do justice to the Revolution. For the latter, while it was—to state the stunningly obvious—'complex', did display broad trends and patterns. Some hark back to the old orthodoxy—which, just because it is old, is not necessarily all wrong—and some can be distilled, on the basis of hard historiographical labour, from recent monographs, especially those which have delved into local and regional history, adopting—rightly and productively—a 'bottom-up' approach which the old orthodoxy (obsessed with the national revolution and the new state) largely overlooked. Perhaps this is what 'post-revisionism' entails; at any rate it is the approach which this overview of the Mexican Revolution will adopt.

Chapter 2

The old regime and the causes of the Revolution (1876–1911)

The historical backdrop

Some historians have suggested that the roots of the Revolution are to be found in the distant colonial period (c.1521–1821) and, certainly, many features of early 20th-century Mexico have colonial origins: a multi-ethnic population (a mixture of Indians, mestizos, creoles/whites, and a small black African population); a powerful Catholic Church; large landed estates; and many of the basic administrative divisions of the country. However, Mexico achieved independence from Spain in 1821 and the 'colonial legacy' was soon overlaid with new features; and it was these, especially those acquired during the thirty-five years of the Porfiriato (the rule of Porfirio Díaz, 1876–1911), which proved crucial in the gestation of revolution.

For fifty years following independence Mexico experienced political instability and, at best, halting economic growth. The new republic lacked the legitimacy of the old monarchy and, while liberals sought to fashion the republic in the image of the US or Western Europe, conservatives nostalgically harked back to the good old days of—supposed—colonial order and prosperity. Ideological polarization provoked a major civil war in the 1850s and, though the liberals, led by Juárez, won the war, they soon faced a renewed conservative challenge, backed by the

Catholic Church and, after 1861, by the army of France's Napoleon III. In the absence of political consensus, administrations were shaky and military interventions frequent. The state lacked adequate revenue (which is to say that Mexicans were very lightly taxed) and the politicized army took a large slice of government expenditure. Instability undermined business confidence and, compared to the major countries of South America, Mexico lacked profitable exports: the old colonial staple of silver mining had been battered by the wars of independence, while, because of Mexico's vast rugged terrain and lack of navigable rivers, transport costs were prohibitively high and foreign trade—on which the state depended for revenue—remained disappointingly low.

Mexico's geopolitical location—and proverbial untapped resources—also made it tempting to foreign predators. In the 1840s the US invaded, triumphed, and made off with half of Mexico's territory. In the 1860s French forces propped up the Emperor Maximilian, provoking a stubborn—and ultimately successful—resistance on the part of Mexico's liberals, led by Juárez. The young Porfirio Díaz, a dashing general of part-Indian origin, made his name in the campaigns against the French and, after their defeat, emerged as a serious pretender to national power. Meanwhile, the conservatives were discredited by their alliance with the invaders and the liberal party, patriotic and victorious, acquired a near-monopoly of national political power.

Thus, it was not until the late 1860s, with the invaders expelled and the Republic restored, that a semblance of stability emerged; and on this basis the economy now began a belated surge of growth. After Juárez's death in 1872, the liberal leaders jockeyed for power and, four years later, Díaz mounted a successful military rebellion. What seemed like yet another episode in the long cycle of coups and civil wars proved a major turning point—in part thanks to Díaz's political acumen (and ruthlessness), but even more because of the favourable politico-economic conjuncture that he encountered. The Mexican people were

war-weary, disposed to tolerate a regime which, while not lacking popular roots, stressed the need for political stability over contestation, and economic growth over civil rights. Mexican elites, notably the so-called Científicos—a narrow coterie of businessmen-cum-technocrats who surrounded Díaz, advocated strong government and business-friendly policies; in the position of Auguste Comte they found a congenial philosophy which gave 'scientific' validation to their views (hence their name which, eventually, became a term of vilification).

Many defeated conservatives sympathized with this positivistic mutation of liberalism and made discreet political comebacks, while Díaz, eager to promote peace, pragmatically encouraged, just as he sought, successfully, a cautious détente with a chastened Catholic Church. Old political rancours faded (or were driven underground) the central government increasingly controlled elections, while repressing armed dissent; and Díaz ensured that no vigorous political parties would disturb the emergent 'Pax Porfiriana' ('Porfirian peace'). 'Mucha administración y poca política'—lots of administration and not too much politics—became the watchword of the regime.

The Porfirian economy

Now, Mexico belatedly entered the global division of labour as a supplier of raw materials and importer of capital (though not of labour: unlike Brazil or Argentina, Mexico could never attract mass migration from Europe, since the material incentives were lacking). Silver mining rapidly revived, but was now supplemented by new industrial mineral exports—copper, zinc, lead—which met the demand of the Second Industrial Revolution in Europe and the US. Agricultural exports, many of them 'non-traditional', also expanded: coffee, cotton, cacao, timber, vanilla, and later rubber. In Yucatán production of henequen—the fibrous extract of the agave plant—experienced a boom, thanks to the voracious demand of the American Midwest for sacking and binding twine. Thus, after

a long pause, Mexico was integrated into circuits of world trade; global integration came later than in many Latin American countries and, in consequence, was the more rapid and destabilizing.

Integration would not have happened without the favourable political circumstances of the Porfiriato and the advent of foreign investment, which the regime sedulously encouraged. Díaz cut the military budget and switched expenditure to economic goals (such as railway subsidies, port installations, and telegraphs). By balancing the budget, his administration restored the country's credit and could borrow at increasingly favourable rates. By the 1900s, when, as a further token of financial prudence, the Mexican peso was placed on the Gold Standard, Mexico could borrow at 5 per cent and the long-standing Finance Minister, José Yves Limantour, enjoyed a charmed reputation in international business and banking circles.

Meanwhile, foreign direct investment, initially mostly European, later increasingly North American, flowed into mining (and later oil), banking, commercial agriculture, stockraising, public utilities (gas, electricity, water, trams), and some manufacturing sectors, especially textiles. But the key sector was the new railway network, built at a brisk clip during the 1880s and 1890s, which linked Mexico City to both the Atlantic port of Veracruz and the northern border, where three trunklines connected to the new North American transcontinental system. US capital predominated in the north, European in the centre; and the regime was careful to play off rival foreign interests, seeking to maximize Mexican advantage and to ensure that, in particular, the burgeoning US did not acquire overwhelming influence south of the Rio Grande. Meanwhile, the railways dramatically lowered transport costs, making possible production—of both minerals and agricultural products—on an unprecedented scale.

The old 'black legend' of the Porfiriato—the stock-in-trade of the victorious revolutionaries—held that Díaz had betrayed both his

country and his liberal-patriotic lineage by kowtowing to foreign interests. He was a *vendepatrias* (a 'seller-out of his country') who ensured that Mexico became 'the mother of foreigners' and the step-mother of Mexicans'. The term 'Científico', denoting Díaz's inner coterie of advisers, became a term of opprobrium. This was effective political propaganda, but a serious distortion of history. Díaz had few illusions about the US and sought to attract American trade and investment without succumbing to American tutelage (as Cuba did after 1898). He and his advisers notably Limantour, sought to balance rival foreign interests and to ensure that they worked to Mexico's advantage, at least as they, the Porfirian policy-makers, conceived it. *Desarrollo hacia afuera*—'outward-led development'—was the norm throughout Latin America in this period, when world trade was booming and foreign investment abundant. And, by the official standards of the day, the Porfirian regime was strikingly successful: railway mileage increased from virtually none to 15,000 miles; foreign direct investment grew more than thirty-fold; exports quadrupled and GNP nearly tripled. Not surprisingly, Díaz became a darling of foreigner observers, investors, and diplomats, who lyrically compared him to Moses, Alexander the Great, Cromwell, Bismarck, and Lincoln.

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There is no doubt that, by premising his project of national development on sustained foreign investment, Díaz encouraged a form of external 'dependency'. By the 1900s, when the regime had lost its old populist reputation and opposition was mounting, Díaz—or, more likely, Limantour—was at pains to reassure foreign markets; the need to maintain Mexico's credit dictated currency policy, possibly to the detriment of domestic living standards. On the other hand, Limantour deployed the power of the state to create a national railway merger and considered ways of both regulating and taxing the crucial mining sector. Furthermore, 'dependency' did not stymie Mexico's manufacturing industry (as some have argued). *Desarrollo hacia afuera* was quite compatible with domestic industrialization, especially from the 1890s. The

textile industry burgeoned, light industry flourished in Mexico City, while in the north-east the booming city of Monterrey, dominated by its powerful business elite, pioneered Mexico's steel and cement production.

Thus, while some critics claimed that Díaz was subservient to foreign interests and, in response, raised the cry of 'Mexico for the Mexicans', they did not represent mainstream popular interests. Many of the rebels of 1910–11, such as the Zapatistas of Morelos, had scant contact with the big—chiefly British, French, and American—foreign interests (the local landlords being Mexican or, occasionally, Spanish); in the north, many rebels were familiar with those interests, but saw them as vital players in both local economies and Mexico's national project of development. Pancho Villa had worked for foreign companies, proving himself to be a capable foreman; and, when he rose to become the chief caudillo (warlord) of the north, his relations with the American mining, cattle, and railway companies were generally cordial. There was no desire to erect Chinese walls against foreign influence; and, unlike the Chinese Boxers, the revolutionaries were in no sense violent xenophobes.

The old regime and the causes of the Revolution

The social impact: the Porfirian state

However, the Porfirian pattern of development did have a decisive—and negative—effect on Mexican society, especially rural society (where over 70 per cent of the population lived). Two related trends were crucial: the strengthening of the state and the commercialization of agriculture. A stronger state was essential in order to promote political stability, business confidence, and the fabled Pax Porfiriana. And certainly the mature Porfirian state was stronger than any that had governed the country since independence. It was solvent; it faced no major political challenges, armed or peaceful; and it controlled a slimmed-down but loyal army, which benefited from up-to-date weaponry, foreign training, and the enormous advantages of railways and telegraphs.

fancifully compared to their Royal Canadian counterparts, the public image—one of brisk efficiency and macho gallantry—was at odds with their actual practice, which involved graft, nepotism and a complacent preference for the quiet life of *cuartel* and *casaca* (barracks and bar). But the rural police—the *rurales*—were full capable of repressing scattered popular protests—on the part of aggrieved peasants, newly organized workers, or the occasional outspoken political dissident. Given its new technology, the army could also outgun any potential rebel, so rebellions came to seem futile; and, even when they occurred—for example, in the remote extremities of the north-west and south-east, where Yaqui and Maya Indian insurgencies were long-standing, the state emerged triumphant, albeit at the cost of behaving like a repressive and even racist colonial regime.

By the 1900s, even as discontent mounted, events seemed to point to that successful armed revolt was out of the question. In 1901, a local political squabble in the state of San Luis Potosí gave rise to a broadly based liberal movement which questioned the (unconstitutional) resurgence of the Catholic Church and called on Díaz to govern democratically according to the provisions of the 1857 (liberal) Constitution. The potential for active political opposition became apparent; but Díaz, rather than bow to liberal demands (thus making a reality of the 'public transcript'—the official discourse—of his regime) chose to harass, arrest, and exile his opponents, choking off the last best chance of democratic reform steered from above. The liberal leaders, exiled to the US, consorted with American radicals and veered to the left; the 1906 programme of the Partido Liberal Mexicano (PLM, Mexican Liberal Party) was as much anarcho-syndicalist as it was liberal, and well as being robustly nationalist. But a radical minority in exile could not threaten the regime; when the PLM attempted revolts on Mexican soil, in 1906 and 1908, they were easily put down; and the disorganized mainstream opposition within Mexico showed no desire to take the risky road of armed revolt.

The old regime and the causes of the Revolution

For the first time since independence, the state was sufficiently strong to defy opposition challenges and its writ ran further than that of any previous national government. Díaz controlled the state governors who were allowed considerable licence—to feather their nests and preserve their regional political dominance—so long as they respected the power of 'the centre'. In many states, enduring oligarchies emerged, combining political and economic power, beholden to 'the centre' and often indifferent to popular interests. Indeed that indifference became more pronounced with time, as the old liberal veterans of the 1860s and 1870s (of whom Díaz was one) gave way to a new generation of well-heeled civilian oligarchs, products of the Pax Porfiriana, believers in the positivistic philosophy of the regime, and disdainful of the disenfranchised popular masses. A classic case was the state of Morelos, south of Mexico City, where the old veteran Manuel Alarcón was succeeded, as governor, by the 'prissy dukeling' Pablo Escandón, the young scion of a wealthy landed family, educated at an English Catholic school, who arrogantly ignored peasant—and 'Indian'—protest. The regime's capacity to mediate, to channel mounting discontent, thus atrophied.

Below the state governors, a lower tier of authority consisted of the *jefes políticos* (political bosses), appointed officials responsible for policing, public order, and general political surveillance. The *jefes políticos* reported up to Díaz and were the eyes, ears, and arm of the state; in their long shadow, local municipal democracy wilted; and popular protest, when it broke out in 1910, was frequently directed against these local agents of Porfirian power. The entrenched state oligarchies—such as the Creel/Terrazas faction in Chihuahua—were also bitterly unpopular; while Díaz, though he remained, to the end, the spider at the centre of the web, was sufficiently remote—perhaps, also, sufficiently patriarchal in bearing and reputation—to escape the worst opprobrium.

Meanwhile, communities and regions that, in the past, had had tenuous contact with the central government, now fell firmly

under its control... balance of power shifted decisively from the provinces to the centre, as it was known. Taxation, political appointments, and control became more onerous and oppressive. Historically, Mexico had developed autonomously of the centre—Combato (Apaches and Comanches), trading and smuggling across the border, and building a dynamic economy based on mining and livestock. Northerners tended to see themselves as more progressive and go-ahead and they resented the distant but capricious authority of the capital. In particular, northern *serranos*—highland people, who inhabited the long chain of the Sierra Madre mountains—chafed at the growing authority of both Mexico City and provincial capitals like Chihuahua City, which was controlled by a particularly powerful politico-economic clique, the Creel/Terrazas faction.

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While such *serrano*/autonomist sentiments were unusually strong in the north, especially the highland north, they were also to be found throughout Mexico, wherever traditional local autonomy had to yield to the burgeoning authority of the Porfirian state: in the Puebla and Oaxaca highlands; on the inland frontier of Yucatán; and in bucolic communities in the centre-west, such as San José de Gracia (Michoacan), where dislike of the central state was enhanced by Catholic suspicions of Díaz—a known, if perhaps an apostate, liberal.

Though ostensibly strong in terms of its stability and reach, the Porfirian state was weak in respect of resources and, even more, popular legitimacy (a point to stress, since it suggests important contrasts with the later revolutionary state). Dependent on foreign trade taxes, the state had a slim, albeit stable, income: it was solvent, but it took less than 5 per cent of GDP in the form of revenue, a paltry \$4 (US) per capita. Its expenditure was largely limited to 'administrative' items: paying the army and the modest state bureaucracy while, above all, servicing the foreign debt.

The state also undertook, or subsidized, key infrastructural investment: in ports, telegraphs, and, above all, railways. But its role was limited to creating the conditions within which domestic and foreign capitalists could prosper. Above all, the state played a minimal role when it came to social policy: basic education was supplied, patchily at best, by the cash-starved municipalities (so Mexico's literacy rate hovered around 20 per cent); and virtually no attempts were made to protect, uplift, or improve the lot of Mexico's workers and peasants. At most, late in the regime's life, some concern was felt for the so-called 'social question' (short-hand for urban squalor and working-class protest), and Díaz made half-hearted efforts to mediate in the mounting industrial disputes of the 1900s.

The social impact: organized labour and the peasantry

In two such disputes, however, the state showed its true colours. In 1906, when workers at the American-owned Cananea copper mine in Sonora, close to the Arizona border, went on strike, the conflict turned violent and Mexican police collaborated with American company guards and Arizona Rangers in repressing the workers, killing some twenty. A year later, the principal textile zone of central Mexico—the Puebla/Orizaba region, east of the capital—was also affected by strikes, protests, and lockouts. Despite mediating in the conflict, Díaz finally sent in the troops and, in the ensuing repression, over a hundred workers were killed or executed. The 1907 depression combined with this draconian response to stifle working-class protest. But the potential for protest remained and the workers, though far fewer than the majority peasantry, were strategically placed in the major cities and in key sectors of the economy (the textile factories, railways, ports, mines, and oil camps), alert for an opportunity to press their interests. Thus, right up to the revolutionary debacle of 1910–11, the regime remained committed to a policy of top-down social control, spurring both enlightened social reform and

effective political representation. In the eyes of most Mexicans, therefore, the state existed in order to control and if necessary repress; it increasingly lacked both social penetration (the ability to put down roots in society) and political legitimacy (the ability to elicit voluntary obedience from its citizens).

Worse, the regime's agrarian policies stoked the fires of peasant discontent—in a country where some three-quarters of the population were rural and poor. Mexico's integration into world markets spurred demand for agricultural exports, already mentioned; meanwhile, the national market for both basic consumer goods (corn, beans, chile, wheat, sugar, and pulque—alcoholic drink of the common people) and also industrial raw materials (cotton, timber, leather) burgeoned, to the benefit of the landlord class. The railways, which underpinned the power of the Porfirian state, also tied myriad local markets into regional and national networks; land values and agrarian profits rose, as the owners of haciendas (large estates), who had for generations complained of inadequate transport and scant demand, now entered a *belle époque* of profitable expansion. The haciendas were—in many cases—ancient creations of the colony; but it required the Pax Porfiriana and the stimulus of demand to turn them into dynamic expansionist enterprises.

Again, the state played a key role. Since the colony, the hacienda had coexisted with the peasant (sometimes also the Indian) village; while, between these two key rural antagonists, stood a class of middling farmers (rancheros). Hacienda-village conflict was old, but had been constrained by the flaccidity of the rural economy, as well as the threat of peasant protest, which historically deterred landlords (and the state) from pushing the peasants too hard. Through much of the 19th century recurrent warfare—which often involved peasant levies—constrained hacienda expansion, while affording the peasantry substantial bargaining power. Most villages were thoroughly familiar with the market and with private property; they combined freehold

property with corporate (community-owned) fields, pasture, and woods; they often rented or share cropped hacienda land, or worked as labourers on hacienda demesnes.

But this rough equilibrium, the product of economic sluggishness and socio-political stand-off, broke down during the Porfiriato. Under Juárez, the liberals had legislated to turn corporate property into freehold, thus to create a vigorous ranchero class. Though some pockets of ranchero farming prospered, the liberals' Jeffersonian vision largely failed. Under Díaz, as peace bolstered business confidence and market demand quickened, hacendados—and some rancheros—took advantage of liberal laws to appropriate village land; thus, peasant villages—like Anenecuilco, in Morelos, the ancestral home of the Zapata family—came under increased pressure. At the same time, the regime sold off vast areas of public land (*balidíos*), in the hope of promoting immigration, investment, and development; but the chief beneficiaries were, again, the big landowners, especially those politically close to the regime.

Landlords now had greater incentives to acquire—whether by legal purchase or shady dealing—the historic patrimony of peasant villages; in the process, they 'freed' the peasants from their means of subsistence, obliging them to switch from independent subsistence farming to tenancy, sharecropping, or wage-labour on the expanding estates. Since, at the same time, moderate population growth (1.3 per cent per year) swelled the rural population, the labour supply grew and real wages declined—a trend evident at least from the mid-1890s. Furthermore, integration into world markets made Mexico—for the first time—seriously vulnerable to the vicissitudes of the global business cycle. In 1907, recession in the US depressed demand for Mexican exports and generated severe unemployment, especially in the north. This was a short-term shock, a conjunctural crisis which affected material living standards in the more commercialized sectors of the economy; but more serious still was the structural

tension engendered by extensive peasant dispossession (or, if prefer, 'proletarianization'), which threatened not only material hardship but also a loss of community autonomy and identity. In Morelos, where the sugar planters systematically squeezed ancient peasant villages of the region, the ruins of lost villages decayed amid the lush field of sugarcane which now blanketed the state, mute testimony to the 'planters' progress' which seemed to be carrying all before it. And Morelos epitomized, in extreme form, a shift in power and resources which affected much of rural Mexico.

As already suggested, the impact of these agrarian changes varied by region. And Mexico, being a vast, highly diverse country, can endlessly be subdivided into regions. The simplest typology involves just three macro-regions. In the north, pockets of agrarian dispossession—in La Laguna, the Yaqui Valley, or the foothills of the Sierra Madre—existed within a more broadly commercial economy, based on mining and livestock, now highly vulnerable to external shocks like the 1907 recession. Thus, in the north we see both traditional peasant protest—for example, the renewed rebellion of the Yaqui Indians of Sonora—as well as broader discontent which united the urban middle class and the growing working class (miners, railwaymen, muleteers, smugglers, and bandits). In central Mexico, where the bulk of the population resided, the classic confrontation of expansionist haciendas and ancient peasant villages was widespread: now, thanks to the conflictual process of Porfirian economic growth, an old story was played out with unprecedented severity, since both economic livelihood and communal existence were at stake. Both regions would play a salient role in the armed revolution.

The south (more strictly, the south-east, from the state of Oaxaca down to Chiapas and Yucatán) proved less revolutionary: not because times were good and people were happy, but because the apparatus of social control was stronger, hence discontent could be stifled. The south was the poorest, most illiterate and Indian

part of the country. Like the centre, it housed a dense Indian peasantry—especially in the southern highlands and the hot lowlands of Yucatán—as well as an aggressive planter class, engaged in dynamic cash-crop production: tobacco in Oaxaca, henequen in Yucatán, coffee and logging in Chiapas. Cities were fewer and smaller, hence middle-class opposition was weaker.

The dominant landlord class, bent on exports (and including European and American planters), resorted to harsh measures to acquire labour—largely Indian labour—from the southern villages. If cash incentives proved inadequate, the planters—and their allies in the local and state governments—relied on coercive forms of peonage, whereby workers were snared in debt or simply dragged into work on the henequen, cacao, coffee, and tobacco plantations of the south. Perhaps the worst oppression—a form of quasi-slavery—occurred in the Chiapas highlands, where logging companies practised a form of ruthless predatory exploitation, indifferent to both human and environmental costs. Yet the south was not notably revolutionary: the carapace of social control proved too strong, the protests of Indians and peons too weak and sporadic. Revolution would not come to the south until northern proconsuls and their forces arrived in 1914, determined to incorporate this—as they saw it—benighted and backward region into the revolutionary mainstream.

Political sclerosis and presidential succession

While successful by its own 'Científico' lights and lauded by foreign observers, the Porfirian political economy thus involved two related features which, over time, proved provocative and destabilizing: the creation of a strong authoritarian state (which denied representation and lacked legitimacy) and the pursuit of export-led development premised on rapid agrarian commercialization, to the marked detriment of the rural majority. While similar features can be discerned throughout Latin America at the time, in Mexico the process was unusually rapid and concentrated (the work of a