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MEXICO: RESTORED REPUBLIC AND PORFIRIATO, 1867–1910

THE RESTORED REPUBLIC, 1867–76

The aftermath of war

The Liberals who came to power in 1855, 34 years after Mexico's independence from Spain, had hoped to give Mexico the productivity and stability of its northern neighbour, the United States. Having seen their country lose almost half of its territory to the United States in the recent Mexican–American War (1846–8), they feared that without a measure of both economic growth and political stability the very existence of Mexico as an independent nation–state would be in jeopardy. Their programme envisaged the replacement of what they considered the unsteady pillars of the old order – the church, the army, the regional caciques, the communal villages – with a 'modern foundation'. True to their programme they proceeded first in a series of reform laws and then in the constitution of 1857 to weaken the position of the church. Catholicism ceased to be the official religion of the state. Ecclesiastic courts lost much of their jurisdiction. Marriages could be effected through a civil ceremony. The clergy could now be tried in civil courts. Church lands were put up for sale. The army too was stripped of many of its former prerogatives. Like the church, it lost its judicial privileges. Officers could now be tried in civil courts. For the first time in Mexico's history its head of state and cabinet were, by and large, civilians. In addition many of the once omnipotent caciques, the mainstay of the ousted Conservative regime, who for so long had ruled their local strongholds with virtually complete autonomy, were forced to yield power to new Liberal appointees. With the adoption of the Ley Lerdo in 1856 the Liberals had launched an all out assault not only on the church but also on the communal villages. The new law prohibited ecclesiastical

institutions from owning or administering property not directly used for religious purposes and extended the prohibition on corporate property to civil institutions, thus effectively abolishing communal land tenure. Communal land holdings had to be sold. Only individual farmers or private partnerships and companies could henceforth own land.

By declaring that Catholicism was no longer the official religion of Mexico, diminishing the political role of the church and destroying the economic basis of its political power, the Liberals hoped that Mexico, like the United States, would attract European immigrants of all religions. As in the United States, these immigrants would constitute an agrarian middle class which would ensure rapid economic growth, political stability and the development of democratic institutions. At the same time the Liberals expected that the constitutional provisions prohibiting the church and the Indian communities from owning lands would have similar effects. Both institutions were to be replaced by a large class of small landowners who would, some Liberal leaders hoped, like the immigrants become the sinews for modernization, stability and democracy in Mexico. At the very worst, if such development did not come about, many liberals expected that if the land passed from the 'dead hand' of the church into the 'living hand' of capitalist-orientated landowners, a significant economic boom and increasing stability would ensue. These landowners might not be interested in political democracy, but like their counterparts in Argentina, Brazil and Chile they would require political stability as a means of ensuring the success of their newly developed commercial properties. At the same time, the destruction of the old army, dominated by Conservative officers, would put an end to military uprisings and coups. A new army organized by the Liberals would constitute a basically different formation.¹

When the Liberal president, Benito Juárez, returned to Mexico City in July 1867 after the war against the French, which had followed three years of civil war between the Liberals and the Conservatives, the flush of military triumph could only briefly disguise the extent to which the Liberals had thus far fallen short of many of the goals they had set themselves twelve years earlier. The execution of Maximilian and so the defeat of Napoleon III had indeed removed the threat of European intervention for a long time, and Mexico's survival as an independent nation seemed assured. The church had lost most of its economic and

¹ For a detailed discussion of Mexican politics in the period 1855–67, see Bazant, *CHLA* III, ch. 10.

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political hold on the country; church-inspired coups were a thing of the past. The old Conservative army, so prone to indiscipline and revolt, had been dissolved for good. Regional government was firmly in Liberal hands. Communal land holdings had been greatly reduced in number. But these developments did not bring the hoped for results. The expropriation of church land did not give rise to a class of small farmers – since the land was auctioned off to the highest bidder, rich local landowners acquired most of it. It thus only added to the economic strength and political cohesiveness of an already dominant class of wealthy hacendados, much to the chagrin of the more radical of Liberals. The new Liberal army was no greater guarantor of stability than the old Conservative one. It consisted of a loose conglomeration of troops – both regular army corps and guerillas – each headed by a different local commander with varying degrees of loyalty to the central government. It was much too large for peace-time needs; yet simply sending the veterans of two wars home without adequate reward for their long service threatened to trigger off new revolts. Despite the new sense of nationalism awakened by the victory against the French and the emergence of Juárez as a genuinely popular national leader, the country was further away from integration than ever before. During the years of war different provinces had come to lead a nearly autonomous existence, deeply isolated in their social, economic, and political life from the rest of Mexico. The parcelling out of communal lands had swelled only slightly the ranks of the middle class. Some of the best lands had been lost to wealthy hacendados. The few peasants who did acquire a plot of their own came to be known among their less fortunate brethren as *los riquitos*. They were evolving into a group very much like the Russian *kulaks* or French *coqs du village*.

These structural problems were compounded by those the civil war and the war against the French had created. Ten years of warfare had left Mexico's economy in chaos. The church wealth on which the Liberals had counted to pay for some of their more ambitious projects had been consumed by the war effort. Mines and fields lay in ruin. The federal tax base had shrunk to vanishing point. During the larger part of Juárez's presidency, as Juárez's last finance minister Francisco Mejía noted in his memoirs, there was literally not a penny in the treasury. The frosty relations with Europe in the aftermath of Maximilian's execution and Juárez's refusal to honour Maximilian's debts did not help matters. The United States, on which Mexico became increasingly dependent as a

consequence, could not make up for the loss of European markets and investment capital.

The Mexican state consisted on the one hand of an overdeveloped army, most of whose contingents were only loosely controlled by the central administration, and on the other the enormously weakened remaining branches of the government. After the initial defeat of the Liberals in 1863, most of the bureaucracy had abandoned the Juárez government and joined Maximilian's administration. Even if the bureaucrats had remained loyal to Juárez, they could have done very little for many years as the Liberals' administration only ruled over a small fraction of the country. The state's weakness and the lack of control of the government over the army would have been less severe if its social and political base had been a united and coherent force. Its constituency was the Liberal movement, and the Liberal movement was badly splintered. In name, programme, and terminology Mexico's Liberal party resembled those of Europe, but not in social composition. Only a fraction of its support came from the Mexican bourgeoisie. To begin with, that group was small, consisting chiefly of textile manufacturers and the so-called *agiotistas*, merchants who speculated in loans to the government. The rest of the bourgeoisie was by and large not indigenous but foreign. After Mexico achieved independence, British merchants replaced the formerly dominant Spaniards. By the 1840s and 1850s, the Germans had begun to take over from them. They, in turn, were driven out of many commercial enterprises by French traders, mainly known as *Barcelonettes* for the town in southern France from which the majority came.

The Liberal movement drew more substantial support from large landowners. Some joined the Liberals because, like the German barons of the fifteenth and sixteenth century, they hoped to succeed to the large land holdings of the church. Others objected to the Conservatives' attempt to impose centralized control over them. Luis Terrazas is typical of this group, except for the fact that he was not born into wealth, but, having started out as a butcher, married into it. Terrazas's grievances against the Conservative regime were manifold. He was contemptuous of its inability to protect his home state of Chihuahua against marauding Indians. He was resentful of its refusal to admit him into its closely knit oligarchy. And he was covetous of the public lands controlled by the central government. Once he became Liberal governor of his native state he utilized his power both to enrich himself by acquiring huge tracts of

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public lands (and some church properties) and to carry out a popular policy of resisting, with far more energy than his predecessors, the increasingly ferocious attacks on the population of Chihuahua by Apache marauders.

Landowners, like Terrazas, viewed with keen suspicion another group from which the Liberals drew support, the middle class: local merchants, small entrepreneurs, *rancheros*, low-level government employees, and some radical intellectuals. The middle class had come to view the power held by the landowners as a major impediment to its own advancement. They encouraged the central government to tighten the reins on its regional barons by, for instance, exacting a fairer portion of its tax revenues from large estates.

Both wings of the party managed to maintain an uneasy truce and to co-operate in periods of war, but as soon as war subsided profound quarrels and conflicts broke out between them. Nevertheless, landowners and middle class were united in their opposition to the demands of a third group, the 'popular sector'. Its composition, still only incompletely known, was diffuse. It encompassed some peasants and an inchoate proletariat of textile workers, blacksmiths, shop clerks, and the like. Its aims were radical redistribution of property on a large scale. The Liberals had been very reluctant to mobilize this group in the course of the civil war. They remembered well what an uncontrollable force the peasants had become when Father Hidalgo in 1810, and one of the warring factions within the state's oligarchy during the caste wars in Yucatán in the late 1840s, had called on them to join ranks. In the war against the French, however, Juárez had thrown caution to the wind, and issued a general call to arms against the foreign invaders. And again, once organized, the popular movements did not show signs of subsiding quickly.

Juárez's political strategy

In the face of these deep rifts it seems at first surprising that Juárez managed to retain his leadership of the Mexican Liberal movement for more than five years. But in fact it was the divided nature of the Liberal movement that helped Juárez to survive. The two mainsprings of the movement – hacendados and middle classes – alternately attacked him for not being sufficiently responsive to its interests, but neither tried to unseat him because it knew that as long as he remained in power the other side would not prevail. Neither did the popular sector seek to overthrow

him. Although acutely discontented with the Ley Lerdo which Juárez continued to implement, they venerated him as one of their own, a once poor Indian who had risen to govern his country and had never ceased proudly to acknowledge his origins.

Shortly after achieving victory over the French and the Conservatives, Juárez reacted to the increasing divisions and impotence of the Liberal movement by attempting to set up a strong centralized state which would have immeasurably increased his independence from his increasingly divided social and political constituency. His prestige then at its peak, he issued a call for new elections and, simultaneously, a referendum on a series of proposed amendments to the constitution. The first added a Senate to the already existing Chamber of Deputies and was intended to divide and dilute the power of Congress. The second gave the president the right to veto any bill subject to the ability of a two-thirds majority in Congress to override it. A third permitted members of his cabinet to answer congressional enquiries in writing rather than in person. A fourth deprived the permanent commission of parliament, a body that continued in session while parliament was in recess, of the right to call for a session of the full Congress at any time. The referendum was not, strictly speaking, over the adoption of these proposals but over the right of Congress to adopt them by simple majority vote rather than having to submit them for special approval by each of the state legislatures. For a brief period, the two main antagonistic wings of the Liberal party united in opposition to Juárez's measures, and as pressure against them mounted, the Mexican president was forced to withdraw the proposed amendments.

To remain in power Juárez now had to resort to greater concessions to the two social groups that had thwarted him. He gave Liberal hacendados virtually unbridled authority over their local strongholds. To win the support of the middle class Juárez expanded the size of the state bureaucracy, one of the favourite sources of employment of the middle class, and directed federal expenditures into areas of particular interest to it, such as improvement of public education, especially in the cities. In 1857 there were 2,424 public primary and secondary schools in Mexico. In 1874, two years after Juárez's death, a government census revealed that their number had increased to 8,103. Perhaps even more important for the middle classes was the fact that Juárez maintained (he probably had little choice in the matter) some democratic institutions. While the government did intervene in elections, these were more honest

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than they had previously been. Parliament, no longer an impotent body, housed a vocal opposition. The freedom of the press to criticize was nearly complete. Some of the country's best known intellectuals – Manuel de Zamacona, Ignacio Altamirano, Francisco Zarco – became increasingly outspoken in their attacks on the mistakes made by the Juárez government.

One segment of the Liberal middle class whose influence was on the rise in the latter years of the Juárez presidency were those Liberal army officers who continued in active service. There was a certain contradiction in this since both Juárez and the main ideologues of the Liberal party considered militarism one of the principal banes of Mexico. In the constitution of 1857 they had abrogated the judicial privileges of the military, and after the victory over Maximilian large parts of the Mexican army had been demobilized. Nevertheless, as the contradictions within Mexican society mounted and revolts were on the increase, the dependence of the government upon the army grew more and more, and officers were again able to exercise political, social and economic influence in the Mexican countryside.

In order to broaden support for his regime, Juárez also attempted to reach a compromise with some of his old antagonists. The ostensible losers in the ten years of war which had racked Mexico between 1857 and 1867 came off better than they or many contemporaries had expected. This was especially true of the Conservative politicians, landowners and bureaucrats. In 1870, three years after his victory, Juárez issued a broad amnesty for all those who had co-operated with Maximilian. Lands were returned to the landowners and Conservative bureaucrats could once again apply for positions in the government. The church on the whole fared worse than its allies. It never regained the lands and properties it lost and its economic supremacy as Mexico's most important source of credit ceased. It could no longer legally impose taxes on the population. The legal privileges of the clergy, the official supremacy of Catholicism, and the influence of the church in educational matters were never restored to their pre-1857 status. The reform laws continued to be the laws of the land. Nevertheless, in practical terms, the church began to recuperate rapidly from its losses. Contributions from wealthy church members flowed into its coffers and were surreptitiously invested once again in urban property. Juárez made no effort to curtail this renewed accumulation of wealth by the clergy, and the latter gave up its former intransigence towards the Liberals. This attitude may have been inspired

by the overwhelming victory of the Liberals after many years of civil war, but it was also the realization of some church leaders that the loss of its lands had actually strengthened its position in the countryside by reducing the potential for conflict between the church and large segments of the rural population. Many peasants now saw the Liberal landowners as their enemy rather than the church. This attitude grew even stronger as church officials became more responsive than in previous years to peasants' complaints and demands.

Juárez had hoped that these conciliatory measures towards Mexico's upper and middle classes as well as towards segments of the army would prevent him from being toppled by a coup and would allow him to pacify the country. The Mexican president's hopes proved to be correct on the first count. Juárez remained in office until he died of natural causes in 1872. His hopes on the second count, however, proved to be illusory. In order to conciliate the country's elite, Juárez had sacrificed the interests of the peasantry. As a result, social unrest in the countryside reached unprecedented proportions during the period of the Restored Republic. The government was too weak to suppress this unrest, and the unrest weakened the Juárez administration even further. This encouraged other forces, ranging from nomadic tribes on the frontier to middle- and upper-class opponents of the regime, to take up arms and challenge the government. As a result the government was even less able to suppress unrest in the countryside. It was a vicious circle.

The causes of peasant unrest ranged from frustrated expectations to a real deterioration in peasant living conditions. The liberal government did nothing to meet the expectations of the peasants or even to protect the peasantry from a further erosion of its economic and social position. The end of the war sent droves of landless and unemployed war veterans into Mexico's countryside, adding to the already overflowing pool of landless and unemployed. The Ley Lerdo had ousted many from the communal lands they had once farmed, then distributed the property, usually unequally, amongst them, if it was not appropriated outright by hacendados or speculators.

The Liberal administration could not have prevented, even had it wanted to, the transfer of church lands from the clergy to large landowners instead of to the peasants. It only controlled a fraction of Mexico during the long years of war against the Conservatives and the French, and its armies needed revenues from the sale of church lands to

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finance the war. After victory the Liberals could have used both the estates of the defeated Conservatives and the vast and frequently empty public lands to set up a programme of land distribution and to create a class of Mexican farmers. Except for granting some public lands to a limited number of war veterans, however, the Juárez administration never seriously considered implementing such an option. Lands of Conservative hacendados were either returned to their former owners or at best given or sold to Liberal landowners. The Mexican government never attempted to do what the United States government did after the American civil war: diffuse the social tensions brought about by the war with a Homestead Act granting free public lands to settlers. Some of the government lands began to be granted or sold to Mexican hacendados while others were kept in reserve for a vast expected wave of foreign peasant immigrants who never arrived.

Nor did Juárez address another major source of peasant discontent, the unequal burden of taxation. The *alcabala*, internal customs, and the personal contribution – the equivalent of six to twelve days' wages for the typical hacienda labourer – exacted a disproportionately higher toll from the poor than the rich. A hacendado owning land worth 20,000 pesos paid the government the same tax as his employee who had no assets to speak of. The Liberals had originally advocated the elimination of the *alcabala*, not so much because of its disproportionate impact on the poor but because of its interference with free trade. The empty coffers of the treasury kept them from following this through. The hacendados, of course, would not hear of readjusting the tax burden. The only measure finally taken to afford relief to the most hard pressed of taxpayers was to waive the personal contribution for anyone earning less than 26 centavos a day.

Nor did Juárez make more than a feeble effort to relieve the worst excesses of debt peonage and, closely linked to it, the arbitrary power of the hacendado over his peons. In 1868 a Liberal congressman, Julio Zarate, asked that landowners be prohibited from setting up private jails, administering corporal punishment, or visiting the debts of parents on their children. Congress rejected the proposal, claiming that it lacked jurisdiction over the matter and that this was a matter exclusively for the local judiciary. Juárez favoured Zarate's proposal and tried to intervene, but the limited measures which he decreed restricting debt peonage were never implemented.

Peasant uprisings in the Juárez era

During the colonial era armed conflict in the countryside had been of three types, each specific to a certain region. First, there were local rebellions, generally confined to a single village and aimed chiefly at eliminating particular grievances with the colonial administration, rather than seeking to overthrow the colonial system *in toto*. This type of unrest was concentrated in the core regions of the country in central Mexico. Second, there were large-scale uprisings against the colonial system as a whole by groups which had only superficially assimilated Spanish civilization and the Christian religion, and which sought to restore what they considered to be the pre-hispanic social, economic, and religious order. These tended to occur mainly in southern Mexico. Finally, there were the resistance movements of as yet unconquered peoples to Spanish attempts to colonize them. These were confined almost exclusively to the northern frontier.

During the period of the Restored Republic revolts broke out in all three of these regions, but they tended to be more radical in character, larger in scope, longer in duration, and more violent than during the colonial period. One of the most radical eruptions to occur in central Mexico took place in 1868 close to the capital itself. The rebels were denounced as ‘rabid socialists’ in the Mexico City press, and they seem to have viewed themselves that way. They were strongly influenced by the socialist Plotino Rhodakanati, who saw in Jesus Christ the ‘divine socialist of humanity’ and ‘saviour of the freedom of the world’. He set up a school in Chalco where his theories were propagated by two of his disciples. Their teachings in turn inspired one of their pupils, a peasant named Julio López, to issue a proclamation calling on the peasants of Chalco, Texcoco and other neighbouring towns to rise against local landowners. ‘We want socialism’, he wrote, ‘we want to destroy the present vicious state of exploitation . . . We want land of our own to till in peace.’² López’s men in fact succeeded in seizing some land around the towns of Chalco and Texcoco and immediately set upon dividing it up amongst themselves. Five months later federal troops routed the rebels: López was arrested and shot.

Socialist influence also manifested itself in states more remote from the capital, like Hidalgo. Two peasants, Francisco Islas and Manuel

² Quoted in Gaston García Cantu, *El socialismo en México* (Mexico, 1969), 173.