



Embattled Mexico, 1844–1876

Neither the Texas war nor the Pastry War, although humiliating for national leaders, especially Santa Anna, changed little in the country. Texas remained a distant wasteland, and the Texas regime a pasteboard republic. The French received some money and more promises, but Mexicans still had access to European loans, and the mining industry had begun to recover. Certainly, the national regime faced problems, particularly a Maya uprising called the Caste Wars in Yucatán and the peninsula's constant secession from the Mexico City regime. Nevertheless, the nation seemed as secure as many in Europe and more so than the Central American republics.

Everything changed with decisions made in the United States. James K. Polk, elected president in 1844, made a commitment to territorial expansion and determined to oversee the creation of a transcontinental nation. In short order, the U.S. Congress annexed Texas, and Polk dispatched diplomats to London to resolve joint control over the Oregon Territory that stretched from Alaska to California, and to Mexico City to purchase ports on the Pacific Coast that would benefit New England maritime merchants. England and the United States agreed to a treaty that divided Oregon at the present U.S.-Canadian border, but Mexican officials expelled the U.S. representative, making it clear they neither accepted the loss of Texas nor planned to sell any ports in California. Polk immediately began searching for a provocation for a declaration of war.

After considering what Mexican actions might justify invasion for some weeks, he confided in his diary a request to Congress based on the hostile treatment of his emissary, the bellicose statements in regard to Texas, and the general disrespect for U.S. territorial claims. On May 9, 1846, he discussed this "ample cause for war" with his cabinet, all of whom supported him, except for Secretary of the Navy George Bancroft. Polk worried congressmen would see his statement for what it was, a request to declare war because of impolite behavior and bad manners.¹ Events in the Rio Grande valley, a region claimed by both Texas and

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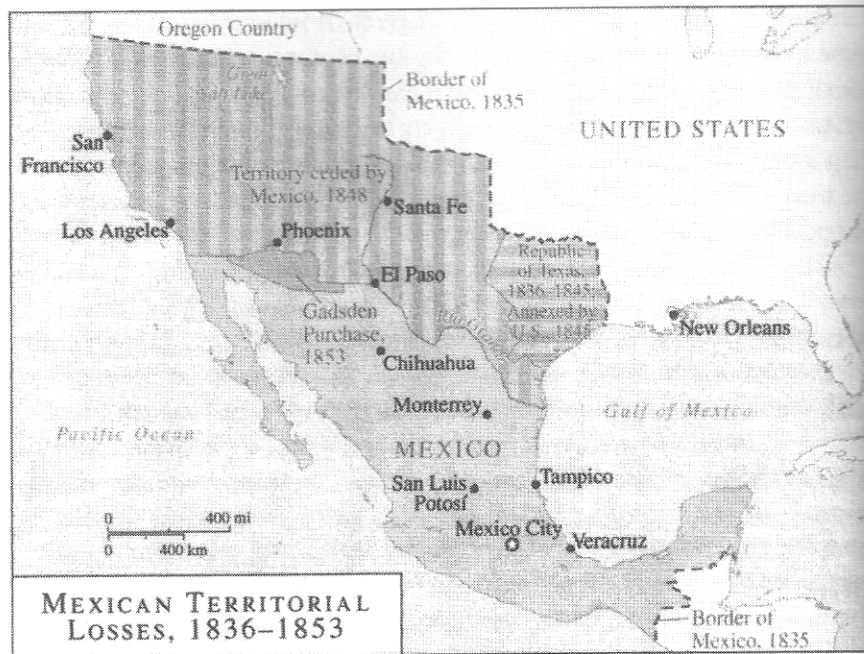
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Tamaulipas, saved him from this indignity. A messenger arrived that same evening with reports of an exchange of gunfire between U.S. and Mexican troops that resulted in some casualties. Polk demanded a declaration of war to retaliate against what he framed as Mexicans "shedding American blood on American soil," a phrase that quickly became the rallying slogan of the pro-war faction and the sarcastic commentary of opponents, such as Abraham Lincoln.²

The U.S. Congress declared war on Mexico in April 1846 in a close vote, with the opposition coming from the party out of power, including Abraham Lincoln, who denied the skirmish had occurred in American territory, and others who opposed the conquest of any territory that might become slave-owning states. The latter concern led Free Staters and abolitionists in western New York and Ohio to lead demonstrations against the war and oppose military conscription and budgets throughout the struggle. Despite this opposition in the North, militias from Illinois and other midwestern states served. Southerners generally supported the war and used names of battles to name towns such as Buena Vista, Alabama; Saltillo, Mississippi; and Mexico, Missouri.

The U.S. intervention took place in three areas: the invasion from Texas into northeastern Mexico; a march from St. Louis to Santa Fe, New Mexico, that divided, sending some troops south into Chihuahua and others west to California; and the principal invasion, an amphibious assault under the command of General Winfield Scott at Veracruz that involved marines, regular army, and militias. This force, following Hernán Cortés's route of conquest, fought a series of battles (Cerro Gordo, El Molino del Rey, and Chapultepec) that led to the occupation of the capital city.

Santa Anna, despite his bravado during the Pastry War that provided him with the popular acclaim again to occupy the presidency, had been forced into exile in Havana when rivals overthrew his government to establish a regime committed to reclaiming Texas. Following the U.S. declaration of war, he contacted President Polk with an offer, if transported to Mexico, to resolve the war. Polk doubted that Santa Anna would negotiate the peace terms he wanted, but he decided that the exile's return would disrupt the Mexican war effort, so he obliged. Back in Mexico, Santa Anna took command of the Mexican troops. Santa Anna fought General Zachary Taylor to a draw at Buena Vista in the north but lost the major battles for the center of Mexico (Cerro Gordo and El Molino del Rey). Nevertheless, he successfully kept an army in the field and, in the losses, avoided having his army destroyed. Technology created the disparity: Mexican soldiers carried



the barrel-loading muskets of the Napoleonic Wars against U.S. troops armed with breech-loading rifles that fired ready-made cartridges. The difference in weaponry gave the United States a three- or four-to-one advantage in firepower.

Technology changed other features of warfare. Samuel F. B. Morse's invention of the telegraph created a more rapid means of communication. Journalists, sending reports to the closest telegraph station in the United States, seized on the technology to provide more frequent and more timely battlefield reporting to the United States and beyond. The recently invented daguerreotype resulted in battlefield photographs. The United States–Mexican War was the first war to be photographed.

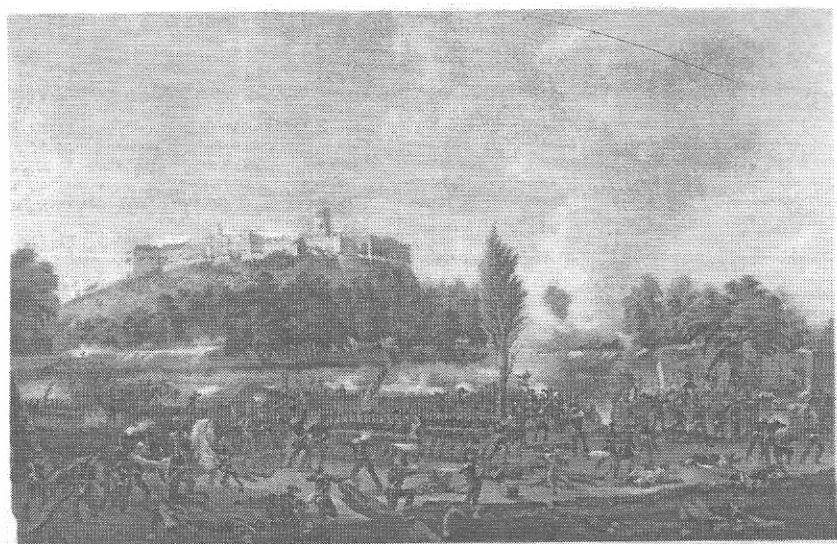
Even as they lost battles in this war of aggression, the everyday Mexican defenders defined patriotism and bravery and paid in blood for their rights as citizens. The defining episode of patriotism came when Santa Anna determined quite correctly that the capital could not be defended and that attempting to do so would result in tremendous civilian losses. He led his surviving troops out of the city. At Chapultepec, the military school, the remaining cadets, all too young to serve on active duty, decided that national honor required them to defend the city. They battled the advancing U.S. Marines until only six cadets

remained, which one death from Marines in and by the Heroes, but who recognize as Mexico's. Equally up to ambush some cases, wars for either that follow Scott's army

This painting depicts the military school completed U.S.-Mexican regular army nation, on Chapultepec 13th, 1847 15/16 in.

remained, and these valiant defenders took down the national flag, which one wrapped about his shoulders, and they all plunged to their death from the fort's parapet. The cadets have been honored by the U.S. Marines in the first line of their hymn ("From the Halls of Montezuma") and by the Mexican government with statues and plaques as the Boy Heroes, but their most enduring monument comes from the people, who recognize that they have defined valor and patriotism for as long as Mexico stands.

Equally courageous guerrilla bands based on local militias sprang up to ambush, cut off, disrupt, and generally harass the U.S. troops. In some cases, no doubt, communities turned to veterans of the independence wars for either leadership or lessons for survival in the chaotic situation that followed the destruction of government. By the end of the war, Scott's army had been stretched to near the breaking point in its efforts



THE STORMING OF CHAPULTEPEC SEPT 13th 1847.

*This painting depicts the advance of U.S. Marines against Mexico's national military school called Chapultepec, on September 13, 1847. Their victory completed the conquest of the capital city and ended formal resistance in the U.S.-Mexican War. The school was defended by cadets too young to be called into regular service. These "Boy Heroes" remain the most heroic defenders of the nation, commemorated in monuments at the entrance to what today is Chapultepec Park. After James A. Walker, *The Storming of Chapultepec, Sept. 13th, 1847* (1848), chromolithography with applied watercolor, 23 9/16 x 35 15/16 in., Amon Carter Museum of American Art, Fort Worth, Texas, 1974.48*

to protect supply lines and maintain even a semblance of control in the conquered regions. The militiamen and the communities that supported them, including the women who provided food and provisions, acted according to their sense of civic life, that carried with it both rights and responsibilities. Guerrillas and soldiers continued to fight for another ten months in the ebb and flow of violence that allowed for neither victories nor defeats. They fought and waited for the politicians to pronounce an end to the war that in a real sense had already ended.

The Treaty of Guadalupe Hidalgo signed on February 2, 1848, concluded the war. Its provisions forced Mexico's leaders to recognize the loss of Texas and the loss of the so-called Mexican Cession (New Mexico, Arizona, California, and most of Nevada and Utah)—together representing approximately half of the nation's territory. The treaty obligated the United States to provide citizenship and protection of property of those Mexicans living in the annexed territory. Article VIII of the treaty read, in part, "Property of every kind, now belonging to Mexicans, . . . shall be inviolably respected. The present owners, the heirs of these, and all Mexicans who may hereafter acquire said property by contract, shall enjoy with respect to it guarantees equally ample as if the same belonged to citizens of the United States."³ This provision remains a major issue that has resulted in numerous court cases, especially concerning title and use of land and water in the U.S. Southwest, particularly New Mexico.

In the treaty, the U.S. government assumed \$3 million in U.S. claims against the Mexican government and paid \$15 million in reparations. Nicolas Trist, who negotiated the treaty for the United States, believed the demands had been too harsh on the Mexicans but nevertheless pushed ahead with the agreement. The treaty ended the war, but more than anything else, it shaped the course of politics for the rest of the century.⁴

As a derelict nation for the next three decades, Mexico survived the trauma, but barely. The U.S. military occupation increased the sense of vulnerability, and the massive loss of territory in the north eliminated the territorial cushion between the victor and the vanquished. The U.S. border had moved closer to the heartland and might well move again, perhaps eventually extinguishing independence. Both Liberals and Conservatives concluded they faced a task of regeneration. The liberals approached the task as an economic more than political crisis. A backward nation lost the war, as many understood, to military technology and organization. Modern weapons, military engineering, communications, and logistics made the difference. José María Mata, the

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principal author of the constitution of 1857, had been a prisoner of war (captured at the Battle of Cerro Gordo), and while a captive in New Orleans, he had studied the enemy at close range. He argued that Mexico could appropriate parts of the U.S. model. Other liberals, even during the U.S. occupation, made some tentative reforms at the municipal level as they struggled to salvage the country from further dismemberment.

The sting of defeat and the loss of territory motivated a national search for an explanation for the internal causes. The Conservatives, in particular the acerbic Lucas Alamán, explained the tragedy as the only possible outcome once the new nation abandoned its heritage of hierarchical rule under a monarch, the legacy of Spanish culture, and the social cement of the Catholic Church. To ward off a predatory United States, he and other Conservatives advocated the establishment of a monarchy allied with European powers. As incentives, the Mexican monarchy could offer access to mineral wealth and a market for European manufactured goods. Economic concessions in return for mutual defense characterized the approach. Antipathy for monarchy as a protective device encouraged the Liberals to turn to the United States as a model and for assistance.

Despite his party's contrary view on monarchism, the Liberal Miguel Lerdo de Tejada worked together with the Conservative Lucas Alamán to develop political and economic strategies for yet another Santa Anna regime. They agreed on Lerdo's proposal for a Ministry of Development in 1852 to foster industry and railroads for economic growth. Their collaboration also called for renewed efforts to attract immigrants. Conservatives, of course, wanted only Catholics, while the Liberals preferred northern Europeans, mainly Protestants, who they believed had superior industrial and technical skills.

A gaggle of Conservative presidents held office, as Conservatives tried to mobilize support for a monarchy and a few others plotted to find a European prince who would come. Neither group had much success, nor were they discouraged. Undaunted by these developments, Alamán forged a regime led by an uncrowned president for life. He chose Santa Anna, bringing him back from yet another exile, for the position. Moreover, he dismissed the need for a constitution or charter for the regime, arguing that "Santa Anna, well advised," would suffice, making clear that he would serve as adviser. Santa Anna, who had been forced into exile again after the U.S.-Mexican War, returned from his Long Island, New York, banishment and began creating a court decked out in green and gold, regal in every way except for a coronation.

Alamán as Santa Anna's minister of foreign affairs explored alliances with European nations with mild results. France sympathized but was unwilling to jeopardize its trade with the United States. Spain discussed the idea of a secret mutual defense pact with Mexico as a way of protecting Cuba. On second thought, the government in Madrid remembered the difficulty of keeping secrets and decided that such a pact might provide the pretext for U.S. seizure of Cuba. A Mexican approach to Prussia to secure military training failed. When events, particularly the U.S. Civil War, changed the international equation, obstacles to European interest in Mexico evaporated. Meanwhile, Alamán died, and Santa Anna would tolerate no other adviser. Santa Anna's attempt to use colorful ceremony and elaborate ritual to build acceptance of, if not loyalty to, his new regime would not be sufficient.

Santa Anna, personal ambition aside, was a committed patriot. One of his contributions to the nation came in the form of the national anthem. The president, with the urging of the members of the well-known literary society the Academy of San Juan de Letrán, and several composers, in 1853 announced a contest for the best poem that could serve as the words for a national anthem. When poet Francisco González Bocanegra won the contest, Santa Anna immediately opened a second contest for composers to write music for the words. Jaime Nunó won. Nunó, a Catalan musician, had directed the Queen's Regiment Band in Cuba from 1851 to 1853 and had come to Mexico at the invitation of Santa Anna. Nunó's music and González Bocanegra's words were heard for the first time when the soprano *Balbina Steffennone* and tenor *Lorenzo Salvis* sang the new national anthem at the Santa Anna Theater as part of the Independence Day celebration, September 15, 1854. The composer, during a period of civil war, fled to Buffalo, New York, and his song also fell from grace. The Liberals who came to power in 1855 opposed the song as the music of Santa Anna. Nevertheless, it continued to be played and sung at the grassroots level and in the 1870s reemerged as the national anthem, with increasing popularity. Nunó, teaching piano and writing brass band music, knew nothing of this until the Pan-American Exposition of 1901 in Buffalo. The Mexican Army Band, attending the world's fair, went to Nunó's house and played the anthem in an appeal for him to return to Mexico. The composer remained in New York but made two tours of Mexico and on one of them presented a march in honor of Porfirio Díaz. Following his death in 1908, he was buried in Buffalo, but in the 1940s, Mexican President Manuel Avila Camacho arranged for him to be disinterred, brought to Mexico, and reburied in the rotunda of illustrious persons next to the poet and

lyricist González Bocanegra. At times, some individuals have tried to change the anthem. At one point, it was even translated into the Aztec language, Nahuatl. Finally, Congress passed a law stating that it could not be changed.⁵ These are the lyrics in English translation:

Mexicans, at the cry of war,
Prepare the steel and the steed,
And may the earth
Shake at its core
To the resounding roar
Of the cannon.
Gird, O country, your
Brow with olive
The divine archangel of peace,
For your eternal destiny
Was written
In the heavens by the
Hand of God.
But if some strange
Enemy should dare
To profane your ground
With his step,
Think, O beloved
Country, that heaven
Has given you a soldier in
Every son.

The phrase “mas si osare” (But if [some strange Enemy] should dare) in the second verse is often sung, especially by schoolchildren, as “Masiosare,” playfully making the phrase into the name of “some strange enemy.” Popular singer-songwriter Chava Flores includes this name in a list of new given names for children reflecting world events in his song “Vámos al parque, Céfrica.” The anthem stands as one of Santa Anna’s greatest contributions to the nation.

Liberals explained the political debacles of the first half of the century as the result of vestigial colonial institutions. The church hierarchy and the feudal estates, the great haciendas, in combination, kept the people in superstitious ignorance and grinding poverty. *Moderados* (moderates) saw collaboration with the ruling group as possible, while the *puros* (radical liberals) opposed Santa Anna. Along with some colleagues, Benito Juárez, the young governor of Oaxaca, went into exile in New Orleans. He worked in a cigar factory while others worked on the docks. Plotting their return, they charted a new course for economic vitality for the republic with technology and transportation as the keys.

Railroads, roads, and even canals became topics considered in Liberal newspapers. Collecting the newest gadgets and machines became somewhat of a liberal hobby for exiles in the United States or visitors to Europe.

Ignacio Comonfort, Melchor Ocampo, and José María Mata all bought Isaac M. Singer's advanced sewing machines (invented in 1851) the moment they became available and brought them back to Mexico. Liberal travelers, returning home, often filled their trunks with promotional literature on railroads, factories, devices, medicinal cures, and inventions. Francisco Zarco, one of the leading Liberal journalists, reminded his fellow Liberals, who dreamed that technology would change everything, that only political stability offered the social circumstances that would allow for economic development. For Zarco, political stability could only be achieved with a separated church and state and general education for the people. He regularly issued pamphlets that repeated his views.⁶

Liberals found complementary opinions about technological and transportation expansion in the United States, particularly in the South, centered in the commercial hub of New Orleans. In general, southerners believed their region had become an internal colony of the wealthy, industrial North. A business conference in Montgomery, Alabama, in 1858 suggested that Latin America offered economic opportunities for the South. New Orleans's *DeBow's Commercial Review* advocated a Tehuantepec railway to link the port of New Orleans, some 700 miles to the north, to a Mexican port on the eastern terminus of the proposed railway, then across the narrow isthmus to the Pacific and on to Asia's markets. The Gulf of Mexico properly envisioned would become an American lake. The desire to paper over sectional conflict linked these fantasies with national political opinion.

Significantly, the last territorial loss for Mexico, achieved through the U.S. Gadsden Purchase, involved a plan to build a transcontinental railroad from New Orleans to California's Pacific coast. The discovery of gold in northern California added an additional attraction. U.S. Army surveyors decided that the most accessible route for a railroad lay just south of the newly established national border, in Mexico's Mesilla Valley. How much land might be necessary seemed unclear, and instructions to the U.S. minister and railway promoter James Gadsden left the issue open. The original treaty between the United States and Mexico on December 30, 1853, agreed to a \$25 million purchase price for this part of Mexican territory, with \$5 million held back to settle claims, and it included navigation rights in the Gulf of California. After the

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Senate rejected the treaty, a strong reaction at the commercial convention held in Charleston, South Carolina, rallied southern and western support and forced it through the Senate on April 25, 1854. The price offered dropped to \$10 million for much less land than Gadsden had in mind. In addition, it provided for right of passage across the Isthmus of Tehuantepec. Santa Anna's desperation for money to finance his regime led to his reluctant acceptance of the price, and ratification by the U.S. Senate followed on June 30, 1854.

The Mesilla Treaty, or the Gadsden Purchase as it is known in the United States, provided the last straw to opponents of Santa Anna. As further fuel for their objections, instead of a focus on development President Santa Anna appeared more interested in creating and maintaining a court with regal trappings. A calendar of court-centered events and holidays preoccupied Santa Anna and suggested a drift into monarchy. His newly organized bodyguard, modeled on that of Emperor Frederick William, dazzled many spectators with their green-and-gold uniforms and blond hair and whisker wigs. Perhaps more important, Santa Anna ignored Liberal politician Lerdo's advice on a reasonable trade policy, raising tariffs and making arbitrary changes in customs regulations, but allowing his close supporters special import and export privileges. A navigation act of June 1854 abusively taxed foreign ships entering ports with goods produced in a third country. The threat to the port of Acapulco's commerce from an arbitrary and unpredictable president and his acceptance of the Gadsden treaty resulted in a call for revolt against Santa Anna.

Juan Alvarez, whose autocratic rule centered in the state of Guerrero, led the revolt of the Liberals, now formed into a political movement and an official party, known as the Revolution of Ayutla. His insurrection drew adherents from across the country, including the exiled Liberals from New Orleans anxious to confront the government. Santa Anna took the field, leading an army into Guerrero to destroy Alvarez. In a major battle, the two armies fought to a standstill. Santa Anna, after sending messages announcing a great victory, returned to the capital and, before anyone discovered the results of the fighting, fled to Veracruz and on to exile in Venezuela, not to return until 1876. Santa Anna's departure provided a Liberal political victory, but Conservatives, especially monarchists, remained undefeated and unconvinced.

Liberals on their return to power attempted to revive trade with a new tariff of 30 percent, a sharp reduction of other restrictions, and new ports of entry along the northern border, the Gulf of California, and the Isthmus of Tehuantepec. They issued a new law that extended

citizenship with the ownership of real property as an enticement for immigrants. The trickle of immigrants remained quite small until 1876 (numbers are impossible to report because the first national census did not occur until 1895), when the Díaz government brought a new era of political stability that encouraged an increasing number of immigrants—almost 50,000 people joined a nation of 12 million in 1895.⁷ The largest number came from the United States, but French, English, and German migrants came as well and were joined by South Americans and Libanese. Chinese immigrants, blocked from entering the United States and British Columbia, came to Mexico and other parts of Pacific Latin America. Nevertheless, changing the economic climate required time.

Liberalism's legitimacy rested on an economic foundation rather than on traditional patriarchal politics and harmony among the social hierarchy. Civil disorder disrupted the republic, sometimes seriously, and drained resources and damaged government prestige. In the case of a Conservative revolt in Puebla in 1856, one of several before the War of the Reform (1858–61), the Liberal government sought a foreign loan of \$300,000. Moreover, foreign debt, particularly to European banks, made the threat of forceful debt collection a possibility.

Rapid economic development depended on everything the national government seemingly lacked: tax revenues, investment capital rather than exploitive loans and unserviceable debt, entrepreneurship, technology, and skilled workers. Any hope of rapid progress appeared to require cooperation with foreigners, perhaps even the United States. At the same time, many feared economic cooperation with foreigners would lead Mexico into status as an informal colony or protectorate. Meanwhile, Conservatives continued their campaigns to engineer a national monarchy.

On another front, Liberals gathered as a constituent congress in Querétaro to write a new national constitution. Lawyers, some with experience as governor or other elected offices, made up the majority of delegates. Several, including the recently returned Benito Juárez, had spent time in political exile. Juárez did not have the military experience of many others, and he was notable for his Zapotec heritage, largely hidden by education, social connections, and marriage. Juárez represented the nineteenth-century Liberal commitment to secular and civilian rule.⁸

The delegates began their work on July 4, 1857, a date purposely selected to emphasize the republicanism they hoped to instill. Equality before the law, individual ownership of property, and rigid separation

between church and state expressed the tenets of a modern, secular nation. These principles appeared in three degrees named for their authors, the Juárez, Lerdo, and Iglesias laws, that shortly became part of a new constitution of 1857. The congress attempted to create a new citizenry distinguished by confidence in secular political and economic principles. Faith that it could be done by a written document seemed naive, but in the long term the constitution became a milestone toward a secular society.

The convention ended with the signing of the constitution of 1857, a moment in the nation's history as important as the call for independence in 1810. The document restricted church activities in order to promote a secular political and economic regime. Articles fostered landholding by individuals, prohibited corporate ownership of real properties, abolished parallel court systems to create equality before the law, and strove to channel political decision making into voting, by removing the troublesome magnets of political discord: the vice presidency, the privileged positions of military officers, and the influence of Catholic Church leaders. Election under the new constitution elevated Ignacio Comonfort to the presidency and Juárez to chief justice of the Supreme Court, first in the line of succession in case of a presidential vacancy. Comonfort believed, correctly, that the radical liberals, the *puros*, had driven the country to the verge of civil war. Although he signed many radical laws into effect, he waffled in the face of Conservative opposition.

The Conservatives, fully aware of the significance of the constitution of 1857, reacted forcefully. When an attempt to negotiate revisions of the constitution failed, they resorted to rebellion. High Church officials, encouraged by Pope Leo XIII, who had adopted an aggressive policy against Liberalism and unionism across Europe and the Americas, urged sympathetic military officers to reject the constitution and seize power. Comonfort remained at the head of a coalition unity government. Conservatives dissolved congress, arrested Juárez, and issued their Plan of Tacubaya, which called for a new constitution that restored the powerful position of the church. A national Council of Representatives elected General Félix Zuloaga to assume the presidency in January 1853. Comonfort, before he relinquished office and embarked for exile in New Orleans, ordered Juárez's release. As far as Liberals were concerned, he had abandoned his nation, his office, and his countrymen. Comonfort insisted he was still president, but the Liberal armies supported Juárez, who assumed the presidency of the country in crisis.

President Juárez prudently fled the capital and reestablished a parallel government in Guanajuato. Little could be done except avoid

capture. He knew he needed to reach the Liberal stronghold of Veracruz, where he could rely on political support and access to customs revenues and international communications. In April, Juárez embarked from the Pacific coast port of Manzanillo for Veracruz by way of Acapulco, Panama, Havana, and New Orleans. He spent almost a month on board American steamers on the most direct sea route available. With considerable difficulty, the Liberals reestablished their government in the port city of Veracruz and began a protracted civil war.

Meanwhile, President Zuloaga annulled the Lerdo, Juárez, and Iglesias laws and ordered the reinstatement of government employees who had refused to swear allegiance to the constitution of 1857. United States minister John Forsyth Jr. recognized the Zuloaga government, assuming that the Conservatives might be more ready to sell territory. But he soon broke relations with the Conservatives and used recognition as a tool to negotiate with the Liberals. He offered recognition in exchange for selling off parts of northern Mexico. The desperate Liberals indicated that with recognition in hand it might be possible. Both sides played a crafty poker game, with territory and diplomatic recognition as the chips.

Both Liberals and Conservatives borrowed money at ruinous interest rates. The most notorious debt was the Jecker loan. Conservative General Miguel Miramón had obtained 750,000 francs from Jean Baptiste Jecker, a Swiss banker in Mexico, who sold the loan to a French syndicate. Juárez repudiated the loan, but in the meanwhile it provided the Conservatives with minimal operating funds in exchange for 15 million pesos of debt. The Liberals continued to deal with U.S. representatives about possible sale of territory or transit rights. Liberals agreed to a Tehuantepec transit treaty without the provision for troops the U.S. wanted. In 1859, the U.S. Senate refused to ratify what came to be called the McLane-Ocampo Treaty, one of the early plans for Atlantic to Pacific connections, as a result of the belief by northern senators that it somehow favored the South and slavery. Northerners continued to support Juárez.

The War of the Reform evolved into a vicious civil war, punctuated by the atrocities and the senseless destruction characteristic of these kinds of battles. The country appeared to have turned against itself in frustration on both sides. The still substantial church wealth suffered greatly as Liberals seized funds and sold valuables to finance the war efforts. Church leaders made loans to finance Conservative war efforts. No matter what the outcome, in economic terms neither the Catholic Church nor a national government could win. The Liberal generals and

the president by succession, Benito Juárez, moved back and forth across the nation during the War of the Reform. Their mobility and their perseverance won out. Finally, on New Year's Day 1861, the Juárez government returned to the capital of the exhausted nation.

The war engendered endemic violence and banditry in the countryside. Immediately after the war, Juárez responded by recruiting individuals, often former bandits, into a rural constabulary. The Rurales became a symbol of repression from that point on through 1911. Nevertheless, they provided a form of rough justice and order in the countryside.

The war had been won, but not the peace. Conservatives, defiantly backed by the statements of Pope Leo XIII, who ordered excommunication for anyone who accepted the constitution of 1857, turned to Europe for redemption. Conservative leaders refused to concede defeat. Several High Church officials went into exile, where they lobbied at European courts and in the Vatican for troops and financial support to defeat the Liberals. They also tried to identify a prince to replace Juárez.

At its conclusion, the civil war left a staggering foreign debt at high interest rates that the Liberal administration could neither service nor repay on schedule, if ever. Juárez ordered a suspension of debt payments, to give breathing space for the economy to recover. He and the Liberals required that everyone—doing public business in courts, buying or selling real estate, recording births, deaths, and marriages in the public registry, even graduating from the university—swear loyalty to the constitution. In this way, Mexicans had to choose between excommunication and participation in civic society.

Juárez's actions, in particular the suspension of debt payments, provided an opportunity for monarchists to find an ally in the emperor of France to intervene in Mexican affairs.

Napoleon III wanted his empire to exceed that of the first Napoleon and at the same time to reverse the international trend toward republics. He planned to lead a coalition of those European nations that once had been united under Rome (in particular, those that spoke languages derived from Latin: Italy, France, Spain, Portugal, and Romania) and their former colonies in the Western Hemisphere. For the latter, his publicists coined the title Latin America. The notion of being associated with a cultivated Europe as part of a Latin world fell on fertile ground. The term, used to separate the United States culturally from its neighbors, came to be accepted worldwide. Napoleon III hoped to fence off the republican north from Latin America and begin a monarchist revival, perhaps in conjunction with the emperor of Brazil. A monarchist Mexico

would symbolically seal the United States north of the Rio Grande to wither in isolation. To isolate the American republic further, he adopted the arguments of Francois Guizot, who warned that the Anglo-Saxon United States verged on destroying the hemisphere's Latin peoples. Napoleon III only needed a pretext to justify intervention to set his plan in motion. The Conservatives offered one. He assumed incorrectly that most Mexicans shared the Conservatives' imperial plans and that his intervention would be welcomed by a grateful Catholic Church and relieved Conservatives in 1861. The French adventure began a year later.

Juárez meanwhile reinstated the Liberal constitution and encouraged the addition of the Epistle of Melchor Ocampo. This letter, written by one of the most prominent Liberals, outlined the rights and responsibilities of men and women in marriage: "The man, whose main sexual attributes are courage and strength, must give and shall always give the woman protection, food and direction. The woman, whose main attributes are self-denial, beauty, compassion, shrewdness and tenderness, must give and shall always give her husband obedience, affability, attention, comfort and advice, treating him with the reverence due to the person who supports and defends us." Incorporated in the civil marriage ceremony, the Ocampo letter served as the legal description of gender relationships and the basis of the family for more than a century.⁹

Juárez's administrative efforts notwithstanding, he presided over a bankrupt government that, by suspending service on foreign debts, provided a convenient pretext for intervention. England, Spain, and France, holding the infamous Jecker loan, wanted to secure custom-house revenues to at least begin repayment. All three agreed to send naval vessels to blockade the port of Veracruz and force collection. France had a hidden agenda. The Liberal assault on the church's role in civil society offered Napoleon III a chance to work on behalf of the pope, with whom he had been at cross-purposes in the struggle over Italian unification. Moreover, he got to play kingmaker and strengthen European alliances by choosing Maximilian, the younger brother of the emperor of the Austro-Hungarian Empire, and his wife, Charlotte, the daughter of the king of Belgium, as the new emperor and empress of Mexico.

A few Spanish and English ships met a full-fledged French invasion force in Veracruz harbor. The English and Spanish commanders, once they grasped the plan, sailed away in protest, and the French officers ordered the invasion of Mexico, with the goal of brushing aside

defenders, occupying the country, and placing the new royal couple on the throne. The French made short work of Mexican troops as they advanced toward the capital city, until they arrived just outside of Puebla, called the City of Angels, and known as the most conservative city in the country. The French expected to be greeted there as saviors, who would restore the church and remove the Liberals.

Liberal soldiers, commanded by Texas-born General Ignacio Zaragoza, prayed for rain to bog down the advancing French troops as they prepared for the May 5, 1862, battle. Zaragoza dug his troops in and redoubled his prayers for rain. The French line, overconfident and overly casual, moved forward in single file. Zaragoza and one of his chief officers, Porfirio Díaz, recognized that if the Mexicans could turn the flank (that is, move beyond the end of the French position), they would have the French in the military equivalent of shooting fish in a barrel. Díaz turned the flank and began the slaughter of the stunned French troops. In the brief battle, the French broke and scattered in retreat. The Mexicans pursued but could not complete the destruction of the French army because they became mired in deep mud caused by sudden, heavy rains.

Nevertheless, the Mexican victory over what at the time was regarded as the world's most powerful army stunned politicians and generals across Europe and the Americas. In Mexico, Cinco de Mayo (May 5) became a holiday marking the bravery and daring of national troops. In France, an embarrassed and outraged emperor ordered 5,000 troops, veterans of the Algerian campaigns, to complete the conquest. In Argentina, the national congress named a Buenos Aires street in honor of the Mexican victory. Throughout Europe, leaders began to rethink French leadership and military strength. The Germans, in particular, revised their assessment of the French army.

The French marked time in Veracruz until reinforcements arrived and then renewed their advance to the capital city. Their new respect for the Mexican soldier made them more serious and, therefore, more effective warriors. At the second Battle of Puebla (1863), the French made short work of the defenders, and the Mexican army abandoned not only Puebla but Mexico City as well. The troops and the Juárez government retreated to the north and for next four years survived by constant relocation. The French occupied the capital and arranged for the new rulers to journey from their Mediterranean palace to their new country.

Even before the imperial family arrived, Napoleon III requested a report on Sonora's mineral wealth, as well as an assessment on whether

the people in the region could be pacified. He planned that at least a part of northern Mexico could become part of the French Empire, providing a buffer zone with the United States and a monarchist Mexico. Physical control of Mexico depended on French troops, including the Foreign Legion. In sharp contrast, Juárez had independent and therefore unreliable commanders, and indifferently armed and trained soldiers who offered only token resistance before falling back to fight again when the moment seemed more advantageous. As a result the French forces controlled core areas but not the republican fringes.

The glamorous couple Maximilian and Charlotte, known throughout European courts, traveled to Mexico armed with grand ambitions, good intentions, and gilded misinformation provided mostly by high Church informants and conservative Mexican exiles. Ignorance compounded their disregard of troublesome reports about the political situation and the people and set the stage for eventual disaster. Both the emperor and the empress intended to become Mexicans of a sort. Charlotte even hispanized her name to Carlota.

Moreover, they intended to make Mexicans into Europeans. Perhaps, their campaigns in architecture, science, art, and manners would have worked, except that the nation had been invaded and occupied. French, Belgium, and Conservative Mexican troops continued an incessant war to defeat the Liberal troops and local militias loyal to Juárez. Conservative leaders demanded that their new rulers immediately restore church and hacienda properties. These demands the emperor would not meet. Rueful Conservatives gradually became aware that Maximilian shared many of the same secular attitudes of the Liberals.¹⁰

The war became a test of endurance and money. The nation remained fragmented: the emperor ruled in French-occupied territories but faced constant guerrilla attacks; Juárez ruled close to wherever his black coach stopped, with military commanders and regional strongmen in power in the rest of the nation. At one point, the invaders nearly defeated Juárez and forced him to the border in northern Chihuahua. The president reached the point of preparing to cross the Rio Grande and go into exile if necessary, but his troops held and gradually began to win small but significant battles that forced the imperial allies south.

Napoleon III hoped that the new emperor would be able to organize the nation financially to support most if not all of the cost of war. An annoyed French emperor grumbled that if Maximilian built fewer palaces and theaters and concentrated on bringing honest men into his government, he could curb wasteful spending and allocate sufficient

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funds to the pacification effort. In 1865 he dispatched a new French financial adviser, Jacques Langlais, reputed to be a talented financial mastermind, to take charge of affairs. This administrative change was too little, too late.

The emperor's army became the victim of American and European events in 1865. In the United States, the Union army defeated the Confederates and won the Civil War. Shortly afterward, the U.S. Secretary of State, William Steward, demanded to know when the French, who were in violation of the U.S. Monroe Doctrine, would leave Mexico (at the same time hinting in the newspapers that a little war in Mexico might be just the thing to reunite the United States). In Europe, Chancellor Otto von Bismarck established the foundations for a stronger Prussia that eventually unified many German-speaking regions and reclaimed territories held by the French. In France, the critics, such as Victor Hugo, who opposed the Mexican adventure doubled and doubled again in response to mounting costs and increasing deaths without victory, honor, or profit for the nation. Napoleon III reconsidered his commitment to Maximilian and Carlota. France turned inward to save itself.

In late 1865, Maximilian received official notification from Napoleon III that the French armies would shortly be recalled because the Liberal armies had been defeated. The French military commander argued that the resistance consisted only of guerrillas and bandits, all of whom he considered to be outlaws not entitled to the rights of soldiers. The commander badgered Maximilian until the latter issued a statement that repeated this conclusion and ordered the penalty of death without trial for these renegades. Ironically, the poorly considered decree subsequently would become the emperor's undoing.

The threat of summary execution made the Liberals fight with greater determination, and they soon received better equipment as well. U.S. Secretary of War Edwin M. Stanton ordered veteran cavalry units and the shipment of surplus arms and ammunition to the region of the Rio Grande. Cavalry officers received orders to protect the war surplus against marauders, Indians, and ex-Confederates, but in the event that Liberal troops crossed the river, the officers and their men were to retreat in good order, leaving the surplus for them. Secretary of State Seward had earlier informed Napoleon III that the U.S. government regarded the French intervention as a violation of the 1823 Monroe Doctrine, which opposed any further European colonization in the Americas.

In this mounting crisis for the imperial regime, the empress Carlota, fearful of the outcome, traveled to Europe with the hope of renewing French support and securing additional military assistance. Napoleon III

and his wife refused to receive her and ignored all talk of treaties and promises. Carlota, frantic with foreboding, went to the Vatican in search of the pope's assistance in pressing the French to keep their troops in Mexico. Pope Pius IX received her but refused to intervene because the emperor and empress had not restored church properties. The empress brought with her a draft concordat to regularize Mexican church-state relations, but it failed to sway the pontiff. Carlota collapsed when she received his decision. She recovered physically, but not mentally, and took refuge with her father, the king of Belgium, with whom she lived until 1927, sane only in patches.

News of his wife's collapse and insanity added to Maximilian's sense of impending doom as the French began to depart and Conservative troops faded away. Several advisers urged him and the rest of the court to return to Europe. Maximilian compounded his poor decision to execute Liberal troops as bandits by listening to the counsel of a shadowy character posing as a German priest, Fritz Fischer, who argued that Hapsburg honor and Carlota's sacrifice demanded he remain. The emperor, an avid amateur biologist, went butterfly hunting to ponder the contradictory advice and reach a decision. When he returned, he announced he had decided to fight on.

Following the French withdrawals, two veterans of the War of the Reform, Miguel Miramón and Tomás Mejía, commanded the emperor's army. They held the city of Querétaro against the advancing Liberal troops, with Juárez and his civilian regime in its wake. Fierce fighting enabled the Liberals to surround the city. The two armies dug in for what appeared to be a long siege.

Maximilian, with his new resolve, decided to march his bodyguard with additional reinforcements to take command of his army at Querétaro. This relief column managed to fight its way into the city, but the Liberals slammed the door behind it and restored the siege. Weeks dragged on, with both soldiers and civilians beginning to suffer from food shortages, limited water, and edgy nerves. The emperor ordered one unit to fight its way out and go to the capital for ammunition, supplies, and reinforcements to break the siege. Maximilian wanted to show that he could carry on as normal; his bravado included ordering wine and sheet music with the bullets and food. Many observers saw this as proof he had lost touch with reality. It mattered little, because the commander and his troops, after escaping the city and reaching the capital, made no effort to return.

The Liberals broke the siege in June 1867 when they brokered an agreement with some Conservative troops who were allowed to escape

in exchange for letting the Liberals through their lines into the city. The Liberals surprised the Conservative high command, including the emperor, and quickly placed them under arrest and awaited the arrival of Juárez. The successful occupation of Querétaro inspired Porfirio Díaz and others to storm the capital city and, with difficult fighting, to capture it. These two victories ended the French occupation and empire in Mexico.

There remained the question of the emperor and his two commanders, Mejía and Miramón. In Querétaro, a circus of conspirators, including the mistress of self-promotion and onetime trapeze artist Princess Salm-Salm, tried to arrange Maximilian's escape. Across Mexico, voices demanded retribution, and others urged generosity. From Europe and the United States, national leaders such as President Andrew Johnson and celebrities such as Victor Hugo pled for the emperor's life. President Benito Juárez ordered trials for treason for the generals and murder for the emperor for ordering the execution of Liberal troops. Once the guilty verdicts had been returned, Juárez announced there would be no clemency. A firing squad escorted the three to the top of the Hill of the Bells on June 19, 1867, where Maximilian offered the place of honor in the center to Miramón (despite the paintings by Édouard Manet) and gave each of the riflemen a gold coin not to shoot them in the face. The squad executed the three.

Tributes to Maximilian in music, poetry, literature, and painting swept across Europe, attempting to excuse him as a well-intentioned, misguided nobleman. Mexicans expressed some sympathy for him, although mixed with amazement at his ignorance of their country. Juárez remained unmoved by imperial pretensions, no matter how utopian, based on military conquest.

Juárez made it evident immediately that he intended to restore civilian rule to the nation. He thanked his commanding officers but indicated that his government's gratitude did not extend beyond a heartfelt thank-you without political and financial rewards. In a reorganization of the military, he soon slashed the size of the army and its officer corps by half. His guiding principles came from the constitution of 1857, and his associates he chose from the extreme Liberals who had surrounded him during exile in New Orleans, the War of the Reform, and the French intervention.

As he worked at restoring republican government, he attempted to erase many imperial attributes, but some he could not and others he chose not to destroy. Maximilian had attempted urban renewal following the Paris model, carving out a new ceremonial avenue named for his



The execution of Maximilian of the Hapsburg family, the French-imposed emperor of Mexico, on June 19, 1867, shocked Europeans as an example of what they believed was Mexican barbarism. The artist Édouard Manet painted several canvases of the execution that contain historical errors. The emperor, shot to death with his leading generals, Miguel Miramón and Tomás Mejía, did not occupy the center place of honor (he gave the spot to Miramón), nor did he wear the sombrero that Manet placed on his head. Erich Lessing/ Art Resource, NY

wife, which went from the center of town to Chapultepec palace, his refurbished royal residence. Juárez renamed the avenue "La Reforma," and, after stripping the palace of many of its imperial trappings and having them sold at auction, he reappointed Chapultepec as the presidential residence.

Of more consequence, Juárez, the *benemérito* (meritorious individual) of his country, understood that the imperial interlude had weakened and discredited conservatism, now linked to foreign intervention. He recognized also that an exhausted liberalism had triumphed, but at a cost he did not want to repeat even to a slight degree. Economic and political stability, the goal of both sides, offered the possibility of unifying the country and proceeding toward the developmental goals laid out earlier by Miguel Lerdo. Release of Conservative prisoners and

an offer of citizenship by the French made it widespread. The Bells appeared

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an offer of conciliation toward those who had collaborated with the French made the point that the executions for treason would not be widespread. Those who died in front of a firing squad on the Hill of Bells appeared to be enough.

In 1868, Juárez, after serving as president for a decade, faced election for the first time. He had assumed the office by succession when Comonfort had fled Mexico and, because of the incessant civil and foreign wars, continued in the position when elections had been postponed. A proclamation calling for national election also contained a referendum in which the president made suggestions to modify the constitution of 1857 to soften its unyielding liberalism. He proposed to allow the clergy to vote, ended residency requirements for federal deputies, proposed the creation of a senate, increased presidential power, and offered a new succession arrangement. If the referendum passed, each of states would need to modify their constitutions accordingly.

Not surprisingly, Juárez's move to the right appealed to Conservatives but not to hard-core Liberals, although its defenders noted that many of the suggested changes mirrored those of the constitution of 1824. Municipalities feared that a more conservative Juárez jeopardized local autonomy. As a consequence, the referendum set off small, local revolts in a handful of states, ironically reinforcing the notion that the country needed more central government control. Under mounting Liberal pressure, Juárez withdrew the referendum, but he arranged for the enactment of some changes through legislation.

Juárez easily won the presidency. The time had come to rebuild the economy and to revive development programs, such as the railroad from Veracruz to Mexico City initiated during the last Santa Anna regime, that had been thrown off track by civil war and foreign intervention. These activities occupied his four-year term of office.

As the end of his presidential term approached, it became clear that after years of battling for survival, Juárez believed that he had become indispensable. He decided to run again. Many felt his fourteen years in office had resulted in increasingly autocratic behavior and now bordered on dictatorial authority. Justification for an authoritarian regime could be found in the new European philosophy of Auguste Comte. Comtian positivism linked order and progress with the goal of a scientific, rather than political, government. It drew on the authoritarianism inherent in the eighteenth-century Enlightenment's notion of human perfection. It also posited an evolutionary development over three stages of history ending in the final technocratic regime under a benevolent director.

Pedro Contreras Elizalde, considered the first Mexican positivist, had studied medicine in France, knew Comte, and became a charter member of the Société Positiviste in 1848. He married one of Juárez's daughters when he returned home and served in the government. Gabino Barreda, the educator responsible for the spread of Comte's philosophy, also studied medicine in Paris, attended Comte's lectures, and knew Elizalde. Barreda organized the National Preparatory School that opened with a class of ninety students in 1868. An important generation of the national elite passed through the school, including José Yves Limantour, the powerful secretary of the treasury during the Díaz regime.

Barreda's other contribution, perhaps equally important, involved a psychological recasting of national history to give value to a traumatic past. Employing Comte's notion of stages, he portrayed the nation's history as an epic struggle between darkness and enlightenment and suggested another era had just begun. The valiant battle against the French ended with a victory for all humanity, one that saved the republican ideal from a monarchist resurgence. Barreda's historical analysis made it all seem worthwhile, in spite of the suffering.

Former U.S. secretary of state Seward, invited by President Juárez to visit Mexico, echoed this interpretation as he placed the U.S. Civil War and the French intervention in the center of the epic struggle against archaic monarchies. He predicted that both republics would now be free to demonstrate the material advantages of republicanism. Juárez, the principal hero of the struggle, stood as the benevolent ruler that Comte favored.

Nevertheless, two plausible candidates opposed Juárez's reelection: Sebastian Lerdo de Tejada, the brother of Miguel, represented middle-of-the-road civilian Liberalism; General Porfirio Díaz presented himself as the candidate of veterans, especially officers, who felt their service had been ignored when Juárez cut the army by some 16,000 troops. In a disputed election, Juárez again won. Lerdo de Tejada joined the government, but Díaz announced a revolt to overturn the government from his Oaxacan hacienda, La Noria. This revolt tested public sentiment for a coup d'état, and, finding little support, Díaz ended the effort and waited.

The complex political situation became more complicated after just a few months, when Juárez died. A new election gave the presidency to Sebastian Lerdo de Tejada, who manipulated the counting of the votes in his favor. Díaz and the political elite accepted the results. It became obvious that President Lerdo de Tejada preferred a strong centralized

government and a captive, obedient congress responsive to his wishes. Opponents claimed that he acted like a czar.

Under President Lerdo de Tejada the reforms earlier suggested by Juárez became law, including the creation of a senate. Laws against wearing clerical robes in public and further restriction on religious displays reinvigorated Liberal anticlericalism, while annoying church leaders. As for economic policies, President Lerdo de Tejada remained committed to Juárez's insistence on civilian rule and economic development, especially railroad building. The latter did not include extending rails north to the United States because, as he explained it, "between strength and weakness, a desert should remain." By 1876, the country had only 416 miles of track, but with plans for a more extensive network. Nevertheless, the years of peace helped a general economic recovery, noticeable in mining.

The 1876 elections matched the incumbent president, Lerdo de Tejada, against the persistent general, Porfirio Díaz. The general campaigned and made promises that addressed a wide range of complaints from the northern borderlands, a region crucial for arms shipment if necessary, to disgruntled federalists upset with the centralism of Lerdo de Tejada. These elements could be expected to rise up in revolt if the election did not go as hoped. When the election results indicated another term for the current president, Díaz issued his Plan of Tuxtepec, which demanded effective suffrage and no reelection—that is, honest vote counting and a one-term presidency.

This time the country rallied to Porfirio Díaz. Joined by other army veterans and disenchanted Liberals, Díaz plotted revolution from Texas. Then he left Brownsville to return by ship to Tampico. Suspicious authorities halted and searched the vessel but failed to discover the well-concealed Díaz. A crew member later told the general that they protected him because one of the sailors had noticed his Masonic ring, and the ship's crew included several lodge members. Díaz landed safely and took command of the revolt.

The Revolution of Tuxtepec soon swept to its victorious conclusion. After a few battles and much political posturing, the Porfirians held supervised elections and, as expected, announced Díaz's election. Meanwhile, a beleaguered Lerdo de Tejada fled to the United States. Few sensed that a major turning point in national history had been reached. Díaz ushered in a prolonged period of rapid agricultural commercialization, industrialization, and unbalanced social progress.¹¹

Many Liberal achievements occurred with Juárez's regime after the French intervention. Reinvigorated and instilled with confidence by the

victory against the French and the intellectual amalgamation of positivism, Liberals felt confirmed in their beliefs. Juárez's movement away from the extremes of the old *puros* appealed to chastened Conservatives. Many of the latter concluded that they could accept a moderate form of liberalism and that national unity required conceding to liberalism's dominance. The legal changes brought both sides together politically. The nation began to show signs of prosperity that could be attributed, rightly or not, to the impact of new ideas and shared ideology. While some of the goals of liberalism were realized, the school of thought retained its harshness toward the lower classes, including Indians, based on their resistance to modern values and methods. But Liberals had successfully overcome the years of wartime invasion, defeat, and occupation to lay the constitutional and legal frameworks for political stability and economic development. General Porfirio Díaz led forward a group of army veterans who inherited the nation they had first defended against both the United States and France and then helped build under the Liberals and Benito Juárez.