A Revolutionary Narrative: On the Origins of Mexico's Strategic Culture, 1917-1929

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Abstract

This thesis studies the origins of Mexico's strategic culture, understood as the expression of a distinctive historical narrative concerning its security. To do so, it focuses on the challenges faced by the country's political leadership between 1917 and 1929, the period in which a triumphant revolution took over the reins of national government and laid the foundations of the modern state in Mexico. Accordingly, it argues that the events of those years gave rise to a singular grand strategic behaviour with a long legacy. On the one hand, the new revolutionary state resorted to diplomacy to ensure its recognition by the international community, in particular by stressing its commitment to international law. On the other hand, the military instrument was used to confront domestic challenges that threatened the consolidation of the revolutionary project ushered from Mexico City. Ultimately, this second dimension of Mexican strategic behaviour has had a lasting and dominant influence on the country's strategic culture.

In effect, the question of how to achieve internal security —that is, domestic order and the preservation of government legitimacy— has remained a dominant concern of the Mexican state for more than a century. Unlike many other polities, Mexico's strategic culture has been shaped almost entirely by internal security challenges, rather than by external threats or traditional foreign policy dilemmas. This formative history has had a distorting effect on Mexico's strategic culture. In exploring this issue, this dissertation seeks to answer a series of questions in greater depth: how was the military instrument used to consolidate the political order that emerged at the end of the Mexican Revolution? Can it be argued that the use of the military instrument responded to a grand-strategic framework? What have been the historical, strategic and conceptual consequences of that experience?

To address these questions, this thesis draws extensively on classic works on the Mexican Revolution, on contemporary studies of Mexican history, and on selected archival material where it sheds light on the country's strategic performance during that period. It is best placed in the field of strategic studies, as an examination of the strategic behaviour of a political community emerging from a period of turmoil and instability. Within this, it also draws on the recent fashion for «applied history», understood as the practice of using historical knowledge, insights and methodologies to address contemporary strategic issues and inform decision-making. Finally, it also makes use of the literature on grand-strategic thought as it explores the origins of the scripts and inherited assumptions by which a nation acts in response to threats to its legitimacy or security.

Acknowledgement and Dedication

The writing of this dissertation —or rather, the preliminary outline of what it now is— began in London in the autumn of 2016, when the world still seemed to be a place with recognisable contours. It concluded in Mexico City in late 2022, after the circumstances that allowed me to begin this journey to and from my home country had changed radically: neither personally nor on a global scale do we live today in yesterday's world. It is therefore a great fortune to conclude this journey.

"I cannot list all my benefactors, but there are two names I cannot allow myself to omit," notes Borges in a justly famous short story. As for myself, I am privileged to have been accompanied by a much larger number of generous people along this journey: I begin by mentioning Alejandro Anaya, Raúl Benítez and Mónica Serrano, who supported this project when it was barely a possibility. I would also like to highlight the unconditional care I have always received from Montserrat Arce, Gustavo Aceves, Mario Arriagada, Alan Bukrinsky, Rodolfo Castellanos and Giulia Luzi, Ana Céspedes, Sheri Chriqui, Ania Deikun, Gonzalo Escribano, Bernardo Gamboa and Alexandra Hernández, Stephanie García Sabatier, Aranza García and Fernando Silva Parás, Andrés Gordillo, Ana Paula Gout, Isaura Leonardo, Roma Loera, Juan Carlos Lombardo, Adriana Martínez, Mauricio Moguel, Miguel Múzquiz and Camille Cieliszka, Pablo Olvera, Nuria Palou and Javier Risco, María José Reyes Retana, Francisco Robles Gil and Geneveve Galán, Camilo Ruiz Tassinari, Camilo Soler Caicedo, and Iker Vinageras, close friends whom I respect and admire. Likewise, my thanks go to my friends and colleagues at the Centre for Grand Strategy: to Andrew Ehrhardt, Nick Kaderbhai and Hillary Briffa, and to John Bew, my patient and generous supervisor, and to Abby Bradley, for her constant guidance.

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Among all the expressions of gratitude, first and foremost is the one I profess for my family and, in particular, for my mother, Irma Moreno Villanueva, who unfortunately could no longer be with us to see the final result of the infinite love with which she accompanied me over these years.

Last but not least, I would like to dedicate this work to Stephanie García Sabatier, who by her example has taught me that each one of us is responsible for lighting the fire needed in order to write our own story wherever we are.

Contents

Introduction

> *Grand strategies do not typically arise from visionary thinking about the future. They arise instead from the collective experience of some great disturbance, looking backward at some catalytic episode that practically everyone remembers. As people try to make sense of what has just happened, they construct quick and understandable rival narratives to explain that past, the present and maybe the future*.[1]
>
> Philip Zelikow

There was a time when the practice of «grand strategy» —understood as the mobilisation of the power resources that a sovereign community draws upon to achieve superior purposes— was considered the exclusive province of great powers.[2] Today we know, however, that the logic of a society's strategic behaviour is discernible even where the vocabulary of grand strategy is absent. As Hal Brands has noted, drawing on the work of Edward N. Luttwak, every polity has a grand strategy, even if it is not explicitly formulated in the documents that account for the positions held by its leaders.[3] And, as Luttwak himself has noted:

> That is inevitable because grand strategy is simply the level at which knowledge and persuasion, or in modern terms intelligence and diplomacy, interact with military strength to determine outcomes in a world of other states, with their own "grand strategies."[4]

In any case, what is certain is that, even without this grand-strategic dimension, the practice of strategy in its broadest sense has always been defined by a relationship between ends and means that is guided by the expectation of achieving lasting political *effects*. [5]

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[1] Philip Zelikow, "Why Did America Cross the Pacific?," *Texas National Security Review*, vol. 1, no. 1 (2017), p. 37

[2] Williamson Murray, "Thoughts on grand strategy" in Williamson Murray et al. (eds.), *The shaping of grand strategy*, Cambridge, Cambridge University Press (2011), p. 1. As for the intellectual history of this notion consult Lawrence Freedman, "Grand Strategy: The History of a Concept" in Thierry Balzacq and Ronald R. Krebs (eds.), *The Oxford Handbook of Grand Strategy*, Oxford, Oxford University Press (2021), pp. 25-40

[3] Hal Brands, *What Good is Grand Strategy?*, Ithaca, Cornell University Press (2014), p. 6

[4] Edward N. Luttwak, *The Grand Strategy of the Byzantine Empire*, Cambridge, The Belknap Press (2009), p. 409

[5] Colin S. Gray, *The Strategy Bridge*, Oxford, Oxford University Press (2016), pp. 165-95

As far as Mexico is concerned, the possibility of elucidating the contours of anything close to a long-term strategic behaviour is a particularly complex task: throughout the last century, the narrative promoted by the Mexican political leadership sought to present their country as a society without strategic ambitions abroad. At the same time, the regime of the Mexican Revolution (1929-2000) emphasised the supremacy of civilian power at the domestic level, favouring the existence of a strong presidential system and a hegemonic party capable of maintaining internal order and an obedient military establishment.[6]

Thus, in 1956, when the regime seemed to be at a time of particular strength, Jorge Castañeda Álvarez de la Rosa, a prominent Mexican diplomat of the period, was to go so far as to say that:

> Mexico has no direct political, territorial, strategic or even cross-border interests, as is the case with all major powers; it does not exercise hegemony over other regions and has no direct interests of its own to protect in the areas that are currently focal points of international tension.[7]

In the Cold War context, this apparent disinterest in the main strategic issues of the time gave Mexico a margin for manoeuvre that was in fact the expression of a carefully constructed behaviour: by proclaiming that their country had no concrete interests abroad, Mexican leaders could also take a strong stand on issues that seemed to endanger international peace and security, especially when such issues directly affected the stability of the Western Hemisphere. As a result, Mexico seemed to be, as Mario Ojeda noted at the time, "the most dissident" of the Latin American states vis-à-vis the United States and, at the same time, the one that could enjoy "the most stable relations" with that superpower.[8]

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[6] By this I mean the regime that emerged at the end of the civil war that shook the country between 1910 and 1920. Scholars point out that, in general terms, its political consolidation was completed in the period spanning the 1920s and 1940s, when a new institutional arrangement laid the foundations of the revolutionary state that persisted in Mexico throughout the last century. On this subject see Lorenzo Meyer, "La institucionalización del nuevo régimen" in Daniel Cosío Villegas et al., *Historia general de México*, Mexico City, El Colegio de México (2000), pp. 825-79. Cf. with Luis Medina Peña, *Hacia el nuevo Estado: México, 1920-2000*, Mexico City, Fondo de Cultura Económica (2010), pp. 21-216

[7] "México no tiene intereses directos de carácter político, territorial, estratégicos o siquiera allende sus fronteras, como ocurre con todas las grandes potencias; no ejerce hegemonía sobre otras regiones ni tiene intereses propios y directos que proteger en las zonas que hoy son focos de tensión internacional." Jorge Castañeda Álvarez de la Rosa, *México y el orden internacional*, Mexico City, El Colegio de México (1956), p. 10

[8] Mario Ojeda, "La realidad geopolítica de México," *Foro Internacional*, vol. 17, no. 1 (1976), p. 7

The assertion of the eminent Mexican diplomat was not without merit: by remaining silent about his country's true interest, Castañeda also refrained from revealing Mexico's structural vulnerabilities in a world governed by the demands of the great powers, thus allowing Mexico's national interest to be preserved in the complex circumstances of the Cold War. The fact that such an interest was at times confused with the security of the authoritarian regime that emerged in the aftermath of the Mexican Revolution is indicative of the complex nature of the Mexican historical experience over the last century. To a large extent, the call to preserve national sovereignty against foreign intervention served to seal the country off from any criticism from abroad.[9] In this way, the Mexican rulers of the period sought to avert one of the most serious threats their country had faced since the beginning of its independent life: the open intervention of foreign powers in its internal political life.

More recently, scholars such as Vanni Pettinà have sought to qualify this position, pointing out that Mexican leaders of the time not only exploited the margins of autonomy that their geographical proximity to the United States afforded their country, but that, as in other Latin American societies, they also waged their own internal cold war by combating left-wing dissidents who at various times expressed their opposition to the regime.[10] Therefore, the regime's guarantee of domestic political stability became a bargaining chip to negotiate with the United States for its position abroad. As a result, the Mexican political elite of the time "knew how to read and interpret the bipolar dynamics with a certain amount of skill, even using them to promote the country's economic development project."[11] Even Henry Kissinger, Pettinà concludes, was forced to acknowledge, in a meeting in

[9] According to Richard Jackson, «regime security» can be understood as the condition "where governing elites are secure from violent challenges to their rule." In contrast, «state security» can be defined as the condition "where the institutions, processes, and structures of the state are able to continue functioning effectively, regardless of the make-up of the ruling elite." There seem to be historical moments in the life of any society in which both conditions are almost indistinguishable. Richard Jackson, "Regime Security" in Allan Collins (ed.), *Contemporary Security Studies*, Oxford, Oxford University Press (2010), p. 187

[10] Vanni Pettinà, *Historia mínima de la Guerra Fría en América Latina*, Mexico City, El Colegio de México (2018), p. 25. Cf. with Hal Brands, "Convergent Conflicts" in *Latin America's Cold War*, Cambridge, Harvard University Press (2010), pp. 9-36

[11] Ibid., p. 82

August 1974 with Mexican Foreign Minister Emilio O. Rabasa, "that Mexico, unlike other Third World countries, knew how to negotiate and get what it wanted from Washington."[12]

As for the reluctance to use the military instrument as a foreign policy tool, the Mexican government also sought to be consistent in its approach: by declaring that the country had no strategic or territorial ambitions beyond its borders, Castañeda sought to underline the fact that the possibility of projecting force abroad made no sense for Mexico. Behind this position lay not only a tacit recognition of the United States' hegemony over North America, but also a disinterest on the part of the Mexican leadership in the possibility of their country behaving as a middle power in the conduct of its international affairs. This option was discarded at the end of the Second World War, when Mexico decided not to capitalise on the modest —albeit real— dividends it had received from its participation in the Allied war effort against the Axis powers.[13] In contrast, the regime emphasised its determination to insist on the primacy of international law as a central tool of its foreign policy-making.[14] Consequently, the use of the military instrument in Mexico was confined to domestic security tasks from an early date. When faced with domestic challenges, the regime of the Mexican Revolution did not hesitate to use armed force to assert its authority when other mechanisms were exhausted or deemed irrelevant.

This is also congruent with the place that the regime of the Mexican Revolution gave to the tasks of the intelligence services within its security architecture. According to the most recent scholarship, the regime's focus on internal security favoured a logic of secret or «political police» aimed at suppressing domestic dissent.[15] Thus, for much of the last century, Mexican authorities believed that political violence could be used against the enemies of the Revolution without regard

[12] *Memorandum of Conversation between Henry Kissinger and Emilio O. Rabasa* (29 August 1974), US National Archives, Record Group 59, Entry P 454, Central Foreign Policy File, 1975, Container 184 C, quoted in Ibid., p. 83

[13] Octavio Herrera and Arturo Santa Cruz, *Historia de las relaciones internacionales de México, 1821-2010*, vol. 1. América del Norte, Mexico City, Secretaría de Relaciones Exteriores (2011), p. 344

[14] See, for example, Alfonso Sánchez Múgica, "Introducción" in Alberto Enríquez, Rosa Isabel Gaytán, and Alfonso Sánchez Múgica (coords.), *La política exterior de la Revolución Mexicana en el centenario de la Constitución de 1917*, Mexico City, Universidad Nacional Autónoma de México (2020), pp. 13-33. Cf. with Eugenio Anguiano Roch, "La doctrina diplomática mexicana" in Rolando Cordera and Enrique Provencio (coords.), *Consideraciones y propuestas sobre la estrategia de desarrollo para México*, Mexico City, Universidad Nacional Autónoma de México (2019), pp. 189-217

[15] See, for instance César Valdez, *Enemigos fueron todos: vigilancia y persecución política en el México posrevolucionario (1924-1946)*, Mexico City, Bonilla Artigas (2021), pp. 17-132

to due process.[16] Eventually, this approach merged with the counterinsurgency model that emerged in the aftermath of the Mexican Revolution.[17]

Therefore, what has been said up to this point makes defines the general characteristics of the grand strategic behaviour that the Mexican state followed throughout the last century. Reduced to its essence, the Mexican grand strategy was articulated around two fundamental axes: persuasion in the external sphere and the use of force in the internal sphere, especially when the hegemonic project built in those years was openly challenged by social actors who were reluctant to be part of it.[18] Accordingly, Mexico's political leaders relied on diplomacy to defend their country's interests in the international arena, but early on they rejected the possibility of using other instruments of national power to assert their interests abroad. As a result, Mexican diplomats shaped a foreign policy that found in the principles of public international law one of its fundamental points of reference.

At the same time, the need to build a modern state in Mexico at the end of the revolutionary war that the country experienced between 1910 and 1920 conferred on the military instrument a utility that was deemed to be of huge importance at the domestic level. The same can be said of the political police function, a central resource for exercising state violence within its own borders. In this way, the three dimensions that, according to Luttwak, guide all grand-strategic behaviour emerge clearly when the case of Mexico is considered with attention: *persuasion*, which shapes diplomatic efforts; *force*, which underpins military efforts; and *knowledge*, which guides the tasks of the intelligence apparatus, even when it is used as a coercive tool in the service of an authoritarian regime.

This dissertation aims to draw attention to the relationship between the use of the military instrument and the maintenance of internal order, leaving for another moment a more detailed

[16] Pablo Piccato, *A History of Infamy: Crime, Truth, and Justice in Mexico*, Berkeley, University of California Press (2017), pp. 1-16, 261-70

[17] Camilo Vicente Ovalle, *Tiempo suspendido: Una historia de la desaparición forzada en México, 1940-1980*, Mexico City, Bonilla Artigas Editores (2019), pp. 359

[18] When referring to the modern state-building process in Mexico, Pansters has argued that it is necessary to consider the way in which coercion accompanied the process of building an enduring political hegemony: two zones or spaces of state activity with extremely porous boundaries. Wil G- Pansters, "Zones of State-Making Violence, Coercion, and Hegemony in Twentieth-Century Mexico" in Wil G. Pansters (ed.), *Violence, coercion, and state-making in twentieth-century Mexico*, Stanford, Stanford University Press (2012), pp. 19-58

consideration of what happened in the external sphere. Its emphasis is on the need to establish a link between the strategic behaviour of Mexico's rulers at the beginning of the last century and the state-building task they confronted. Thus, it is a thesis on the domestic dimension of statecraft that draws attention to a particularly complex moment in Mexico's political life: the period following the great civil war of 1910. In short, it is a case study in which the example of Mexico is used to explain the evolution of a strategic culture that is not alien to the realities of other societies on the periphery of the developed world. This is relevant because the different dimensions of the Mexican strategic behaviour fulfilled the same function throughout the last century: to allow the consolidation of a hegemony capable of exercising effective political authority in a country that previously experienced the consequences of a major civil war. In this context, a resource that in other societies was projected externally in Mexico was concentrated on internal tasks to serve a purpose common to all strategic behaviour: the need to create power in a sustainable way.[19]

1. Purpose of this dissertation

The purpose of this dissertation is to study the origins of Mexico's strategic culture, understood as the expression of a distinctive historical narrative. Accordingly, it aims to study in historical, strategic and conceptual terms the origins of the Mexican national security policy, placing a special emphasis in the use of the military instrument as a tool of statecraft at the domestic level. In doing so, this thesis pays special attention to the dilemmas faced by Mexican presidents between 1917 and 1929, the period in which a triumphant revolution assumed the government functions that ultimately laid the foundations of the modern state in Mexico. That period begins in 1917 with the call by President Venustiano Carranza (1917-20) to establish a Constituent Congress in Querétaro in the aftermath of the revolutionary war that began seven years before.[20] It continues in 1920, when General Álvaro Obregón rose up in arms to depose Carranza, thus ending the first civilianist experiment attempted in Mexico after the civil war of

[19] Lawrence Freedman, "Preface" in *Strategy: A History*, Oxford, Oxford University Press (2013), p. xii

[20] Venustiano Carranza (1859-1920) was a prominent leader of the Mexican Revolution. In 1913, he assumed the command of the Constitutionalist Army to deal with the coup d'état that deposed President Francisco I. Madero in February of that year. Once the constitutional order was re-established, Carranza assumed the Presidency of the Republic for the period 1917-1920. Supporter of a civilianist solution for Mexico, he was deposed in 1920 due to a military uprising led by Plutarco Elías Calles, Adolfo de la Huerta and Álvaro Obregón. For a general account of Carranza's career see Felipe Ávila, *Carranza: el constructor del Estado mexicano*, Ciudad de México, Crítica (2020), pp. 392

1910.[21] Finally, it concludes around 1929, when General Plutarco Elías Calles called for the creation of a hegemonic party capable of putting an end to the dissensions that had previously fractured the unity of Mexico's new ruling class.[22]

This thesis is therefore a study of the founding moment in which the regime of the Mexican Revolution took decisive steps to establish an effective national political authority in a country that had previously been torn apart by the consequences of a long civil war. In this way, the project seeks to study the origins of the strategic culture of the Mexican state by taking as its starting point the historical moment in which the foundations of its political and institutional architecture were established.

1.1. Argument and research question: on the origins of Mexico's strategic culture

The civil war that broke out in Mexico in November 1910 put an end to the political stability that the country experienced in the second half of the nineteenth century under the leadership of General Porfirio Díaz, who held power from 1876 to 1911.[23] In a short time, the process of political centralisation set in motion by the authoritarian regime of Díaz in those years gave way to a new period of armed violence that ended the material progress achieved in Mexico. At the same time, the principles of nineteenth-century political liberalism were replaced by a new revolutionary

[21] Álvaro Obregón (1880-1928) was the architect of the military victories that made possible the triumph of the Constitutionalist Movement between 1914 and 1915. A general from Sonora, Obregón soon stood out for his political ambition and recognised strategic competence. Once Carranza was ousted, Obregón's administration (1920-24) began an extensive process of national reconstruction that required all the resources of statecraft. At the end of 1923, Obregón decided to impose General Plutarco Elías Calles as President of the Republic, and so he had to face the Delahuertista Rebellion, a new military uprising. At the end of 1923, Obregón decided to impose Calles as President of the Republic, and so he had to face the Delahuertista Rebellion, a new military uprising. When Obregón was re-elected in 1928, an assassin linked to the Cristero insurgency killed him in an assassination attempt. For a general overview of Obregon's trajectory see Jürgen Burchenau, *The Last Caudillo: Alvaro Obregón and the Mexican Revolution*, Malden, Wiley-Blackwell (2011), pp. 232. For

[22] Plutarco Elías Calles (1877-1945) was a revolutionary general from Sonora who initially joined the forces of the Constitutionalist Army under the command of General Alvaro Obregón. In 1920 Calles joined the uprising led by De la Huerta in favour of Obregón's political ambitions and became his successor as President for the 1924-28 period. In the decades that followed, General Calles became one of the central arbiters of public life in Mexico: as proponent of a strong state and a presidency capable of concentrating broad political and administrative powers, Calles is regarded as one of the builders of modern Mexico. For a general overview of Calles' achievements and contradictions consult Jürgen Buchenau, Plutarco Elías Calles and the Mexican Revolution, Lanham, Rowman & Littlefield (2006), pp. 3122

[23] Paul Garner, *Porfirio Díaz: Entre el mito y la historia*, Mexico City, Crítica (2015), pp. 153-200

agenda with a broad content of social change.[24] According to Daniel Cosío Villegas, the Mexican Revolution (1910-1920) had "three major goals: political freedom, agrarian reform and labour organisation."[25] To attain these goals, Arnaldo Cordova points out, the Revolution's leaders embraced a guiding principle: to turn the state into the great arbiter of the nation's development.[26]

Between 1910 and 1913, the revolutionary process revolved around a clearly defined political objective: the use of armed force to destroy the Porfirian order established in Mexico since 1876. Thus, one of the initial aspirations of the revolutionary movement was to destroy the dictatorship of Porfirio Díaz in order to make democracy possible in Mexico. As a result, the old political order was destroyed on the battlefields of the revolutionary war of those years. Yet, the victory of the Revolution did not usher in a new period of peace: from 1913 onwards, different revolutionary factions contended for the conquest of power and, especially, for the right to rule from Mexico City. Alan Knight has pointed out that this was the period of the "war of the winners": a fierce civil war that was finally decided in favour of the arms of the Constitutionalist Movement, led by Venustiano Carranza.[27]

As for the agenda of the Constitutionalist Movement, its original purpose was very concrete: to restore the constitutional order interrupted by the military coup that deposed President Madero in February 1913. Under this banner, the new movement demanded the enforcement of the provisions of the 1857 Constitution and disowned the national government headed by General Victoriano Huerta (1913-14) in Mexico City. Convinced that it was necessary not to repeat Madero's mistakes, the leaders of the Constitutionalist Movement thus embraced a theory of victory that from the outset recognised the centrality of the military instrument. Accordingly, concludes Alan Knight, the movement "exemplified a 'new spirit and a new conception of political struggle', in which the old liberal idealism gave way to a 'ruthless, cunning, arbitrary' *Realpolitik*."[28] Beyond this short-term perspective, a long-term, grand-strategic objective soon became clear: to transform the revolutionary experience into a state-building exercise.

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[24] Rafael Rojas, "Formas de decir *revolución*" in *La epopeya del sentido*, Mexico City, El Colegio de México (2022), pp. 25-58
[25] Daniel Cosío Villegas, "La crisis de México" in *Extremos de América*, Mexico City, Tezontle (1949), p. 31
[26] Arnaldo Córdova, *La ideología de la Revolución Mexicana*, Mexico City, Ediciones Era (1973), pp. 236-47
[27] Alan Knight, *The Mexican Revolution*, vol. 2. Counter-revolution and Reconstruction, Lincoln, University of Nebraska Press (1986), pp. 263-320
[28] Ibid., p. 104

Therefore, once his enemies were defeated in a series of decisive battles in the summer of 1914, Carranza occupied Mexico City to allow the organisation of an effective national government. However, several more years were to pass before the First Chief of the Constitutionalist Army could convene a grand national assembly to grant Mexico a new constitutional framework. This only happened in late 1916, when Carranza finally issued the call for the establishment of a Constituent Congress in Querétaro City.[29] Yet, to ensure the success of the new assembly, Carranza had to reconcile the call to recover the liberal spirit of the 1857 Constitution, which he himself favoured, with the demand to include in the Mexican constitutional framework new social provisions of a more radical nature.[30] Finally, in February of the following year a new constitution was promulgated; it was only from then on that it was possible to speak of a new revolutionary state in Mexico.

In essence, the political leadership of the new state created in 1917 constantly resorted to the use of force to assert its authority. Rebuilding the sovereign centre disintegrated in the last great political upheaval thus became one of its central objectives. This was not the first time this had happened in Mexico: from the mid-eighteenth century onwards, the modernisation process driven by the Hispanic Monarchy in its American kingdoms advised the establishment of permanent army corps in the territories of New Spain.[31] This initiative set in motion a cycle of political centralisation that was only interrupted by the civil wars that the country experienced over the following century, when the aspiration to build an independent nation conferred the new Mexican Empire (1821) and eventually the Mexican Republic (1824) a distinct political identity.[32] However, the Mexican Revolution (1910-120) was part of a new cycle of armed violence that put an end to the period of material progress and political stability that the country had experienced at the end of the nineteenth century. As a result, it laid the foundations for a behaviour governed by the demands of

[29] Javier Garciadiego, "¿Por qué, cuándo, cómo y quiénes hicieron la Constitución de 1917?," *Historia Mexicana*, vol. lxvi, no. 3 (2017), pp. 1202-203
[30] Ibid. 1193-96
[31] On the grand-strategic thinking of King Charles III (1759-1788), the central architect of this process, see Allan J. Kuethe, "Carlos III, absolutismo ilustrado e imperio americano" in Allan J. Kuethe and Juan Marchena F. (eds.), *Soldados del Rey*, Castelló de la Plana, Publicacions de la Universitat Jaume I (2005), pp. 17-30
[32] Christon I. Archer, *El ejército en el México borbónico 1760-1810*, Mexico City, Fondo de Cultura Económica (1983), pp. 15-22, 351-75. Cf. with David A. Brading, "El nuevo Estado" in Orbe indiano, Mexico City, Fondo de Cultura Económica (1991), pp. 503-29, and with Eric Van Young, *Stormy Passage: Mexico from Colony to Republic*, 1750-1850, Lanham, Rowman & Littlefield (2022), pp. 103-78

a strategic landscape very different from that which prevailed when Mexico first became an independent nation.

Accordingly, the argument of this dissertation rests on the proposition that what happened in those years sowed the seeds of a strategic behaviour that would be remarkably persistent throughout the last century. Consequently, to pay attention to the politico-military circumstances that conditioned the outcome of the civil war that began in 1910 is to locate the origins of the Mexican strategic culture under a long-term perspective. That is to say, under a historical perspective. Thus, the starting point of this dissertation is to be found in a set of questions that relate to the way in which the military instrument was used at the beginning of the third decade of the last century. The first, and perhaps the most important of all, are the following:

- How was the military instrument used in the 1920s to consolidate the political order that emerged at the end of the Mexican Revolution? Is it possible to argue that the use of armed force can be placed in the framework of a grand-strategic behaviour in that period? What have been the consequences of this experience in historical, strategic and conceptual terms since then? Did this strategic behaviour have an influence on the evolution of the strategic culture of modern Mexico?

The first of these questions opens the door to a detailed study of the challenges that Mexico's revolutionary leaders faced in those years. Once the civil war was over, the exercise of armed violence did not cease in key portions of the national territory. No less important is it to recognise that the army of the Revolution became a growing threat to the political leaders who profited from its victory in the previous decade. The dispute between the proponents of civilianism and the militarists soon divided the country once again, and a political solution was needed to end the turmoil of the ensuing years.

The second question is no less relevant: pondering whether the use of the military instrument genuinely answered to a grand-strategic framework is a necessary step when debating the scope of the Mexican Revolution's statecraft, especially in the years that followed the promulgation of the 1917 Constitution. Isolated from the concert of nations, but in need of international recognition, the regime of the Revolution was required to demonstrate that it was capable of

exerting effective government functions over the entire national territory of Mexico. In this context, an effective use of force became a central issue for those who claimed to rule from Mexico City. In the years that followed this provided the new regime with an important source of lessons regarding the utility of force and, above all, a clear narrative about its own origins.

Finally, the last two questions allow us to explore the lines of continuity that bound the Mexican historical experience of the early days of the last century with the present. Taken together, these questions offer an avenue of historical interpretation to approach the circumstances of the present time in Mexico, especially if one assumes that the Mexican Revolution is the great upheaval that marked the beginning of a new historical time in the life of that country.[33] In this context, it is important to note that the grand narrative of the last century no longer seems adequate to address Mexico's strategic needs in the first decades of the twenty-first century.

1.2. Theoretical framework: from applied history to strategic studies and back

The purpose of this dissertation is to study the origins of Mexico's strategic culture from a long-term perspective. In this sense, the analytical exercise developed in the following pages is based on two fundamental criteria: a recourse to applied history and strategic studies. It also relies on the study of grand strategy, especially when it is helpful in illuminating the nature of Mexican statecraft in the early twentieth century.

To appeal to the criterion of «applied history» is to call for the introduction of a type of *historical sensibility* that reveals its usefulness when facing the challenges of the present.[34] According to Eliot Cohen, this sensitivity is based on a way of thinking that draws on history "as a mode of inquiry and framework for thinking about problems".[35] Such an approach is not without its dangers: generally, when decision-makers turn to the work of historians, they do so not to ponder the complexity of their societies' historical experience, but to justify a decision on the basis of a historical precedent

[33] Citing the work of Heimpel, Pieter Lagrou recalled over two decades ago that the present time always begins with the last great catastrophe or, at least, with the last great rupture. Pieter Lagrou, "De l'actualité du temps présent" in *L'histoire du temps présent, hier et aujourd'hui*, Bulletin de l'IHTP, no. 75 (2000), p. 4

[34] For an account of the current state of the debate on the relevance of this approach, see David Lowe, "Applied History Today," *Journal of Applied History*, vo. 1, no. 1-2 (2019), pp. 1-11, and Olga Manojlović Pintar, "On Public/Applied History," *Currents of History*, no. 3 (2018), pp. 171-90

[35] Eliot A. Cohen, "The Historical Mind and Military Strategy," *Orbis*, vol. 49, no. 4 (2005), p. 575

that happens to be convenient or timely.[36] And yet, as Francis Gavin has noted, a serious and sustained engagement with the past "helps a decision-maker to develop a historical temperament or sensibility" in the sense that Cohen intended.[37] But if this is true, how can such a historical sensibility be conceived? According to Gavin, such a sensibility must demonstrate "a toleration and even appreciation of uncertainty, surprise, and unintended consequences in human affairs, and a comfort with indeterminacy and multi-causal explanations." As a result, it must make "the unfamiliar familiar, while revealing the unfamiliar in what was believed was well understood."[38] With this statement, Gavin's reflection returns to its starting point, or at least to the heart of the argument on which the practice of applied history rests: the method of history is a central resource for statecraft insofar as it anticipates a kind of judgement that, in Isaiah Berlin's words, is extremely useful for political action.[39]

Moreover, Gavin's argument is related to what was said around 1990 by Hugh Stretton, one of the scholars David Lowe considers when talking about the landscape of applied history today.[40] According to Stretton, historians should be valued "for bringing three qualities that were scarce in the social sciences: a holistic focus; an embrace of uncertainty; and a necessary eclecticism, taking into account both the myriad forms of behaviour in the people they studied and the choices historians made in their explanatory reasoning."[41] This is particularly important because the purpose of historians is not to study a dead past, but rather "to study how whole societies *conserve* and *change* their social life."[42] In the light of these considerations, applied history questions the temptation to reduce the study of historical experience to a narrative in which the present becomes an inevitable outcome.

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[36] Thus, the distance that separates the two professions is in principle dictated by the orientation of their professional purposes: "policy-makers demand certainty and prediction, whereas historians traffic in uncertainty, unintended consequences, and context." Francis J. Gavin, "Thinking historically: A guide for policy" in Andres Wenger et al. (eds.), *The Politics and Science of Prevision*, London, Routledge (2020), pp. 100-101

[37] Ultimately, points out Gavin, such a historical sensibility "is less a method than a practice, a mental awareness, discernment, responsiveness to the past and how it unfolded into our present world." Ibid., p. 102

[38] Ibid., pp. 102-103

[39] Isaiah Berlin, "Political Judgement" in *The Sense of Reality*, New York, Farrar, Straus and Giroux (1997), pp. 40-53. Cf. with John Stone, "So many butterflies: Isaiah Berlin and the challenge of strategy," *The Journal of Strategic Studies*, vol. 44, no. 5 (2021), pp. 640-60

[40] Lowe, Op. cit., pp. 8-9. Cf. with Hugh Stretton, "A Use for History (1990)" in *Hugh Stretton: Selected Writings*, Melbourne, Schwartz Publishing (2017), pp. 195-98

[41] Ibid., p. 9

[42] Stretton, Op. cit., p. 197. Our emphasis.

In fact, such a temptation has a starting point in the experience of all human beings. According to David Orr, at the individual level it is an exercise in «confabulation» that allows the mind to make up "an impressively creative story to fit the reality that it perceived."[43] As a literary critic, Orr has resorted to this term to explain the internal logic of a justly famous poem by Robert Frost. The issue, apparently unrelated to the criterion of applied history, is particularly relevant when one considers that states, as structures of political domination, resort to a similar process when constructing the narratives that guide their strategic behaviour. In effect, at the collective level this process of confabulation gives sustenance to the *scripts* that guide the strategic behaviour of a specific society in the long term.[44] Sir Lawrence Freedman has observed that such «strategic scripts» are in fact "stereotypical situations which set expectations for appropriate behaviour."[45] Originally conceived as frameworks that seek to respond efficiently to a wide variety of social needs, over time these scripts can also become straitjackets that hinder a society's ability to cope with the demands of a changing strategic landscape.[46]

It is here, warns Philip Zelikow, that the pretence of reducing the study of history to a set of generalisations is at work; especially when those generalisations lead to the formulation of precepts designed as guidelines for the future.[47] Over time, this process sows the seeds of those strategic scripts that can eventually lead a political community to disaster:

> Some reigning lessons become so well known, taught and retaught, that they ossify into one of the small number of master scripts that can mold public policies across whole eras. These aging shibboleths can go on for quite a long time until they are overthrown.

Therefore, concludes Zelikow, when those shibboleths "are finally toppled, it may not be because the historians have gotten better or the history readers have become wiser. More often, some new collective trauma— a war, a depression— has displaced them, swept them away with compelling

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[43] David Orr, *The Road Not Taken: Finding America in the Poem Everyone Loves and Almost Everyone Gets Wrong*, New York, Penguin Books (2015), p. 122
[44] Lawrence Freedman, *Strategy: A History*, Oxford, Oxford University Press (2013), pp. 615-18,
[45] Ibid., p. 619
[46] Loc. cit.
[47] Philip Zelikow, "The Nature of History's Lessons" in Hal Brands and Jeremi Suri (eds.), *The Power of the Past: History and Statecraft*, Washington, D. C., Brookings Institution Press (2016), pp. 281-286

needs for fresh social constructions."[48] What then is the alternative? For Zelikow, the answer to this question lies in the requirement to accept that complexity is a more reliable source of historical knowledge.[49] However, to embrace the complexity of the past is to enter the realm of contingency, precisely where the forces of fortune exercise their dominion over the affairs of human beings and their communities.

Thus, if the study of history has lessons to teach, they are certainly not to be found in the realm of confabulation, where stories are constructed in retrospect, but in the realm of the non-linear: a realm defined by historical actors who were forced to make concrete choices in order to move towards a future that was not yet fully discernible.[50] Therefore, to untangle what did happen, "to unpack de Tocqueville's 'accidents,' the historian needs to consider too what was *not* chosen, what did *not* happen. And why," notes Zelikow.[51] It is only by resorting to this perspective that history abandons the condition of being a moral or ideologically edifying tale to become a resource that can instruct us "about human nature and our future best choices by teaching us about *possibilities* rather than *regularities*."[52] As a result, it can be concluded that the attribution of intentionality — that procedure which, according to the Mexican historian Edmundo O'Gorman, holds a central place in the constitution of the historical fact— must be placed in relation to the conditions of possibility that exist at each historical moment.[53]

Nevertheless, the possibility of appreciating the burden of contingency on human decisions does not resolve a question already formulated some time ago by another Mexican scholar: history, for what? [54] "There is no historical discourse whose efficacy is purely cognitive; each historical discourse intervenes (is inscribed) in a given social reality where it is more or less useful for the

[48] Ibid., p. 286
[49] Ibid., p. 298
[50] Recently, a young Mexican poet has made reference to the non-linear character of human experience. On this subject, see Elisa Díaz Castelo, *El reino de lo no lineal*, Mexico City, Fondo de Cultura Económica (2020), pp. 24-27
[51] "Fixing only on what actually did happen in a past experience is what can convert the past episode from a menu of mind-opening options into a mind-closing axiom." Zelikow, Op. cit., p. 299
[52] Michael Scriven, "Causes, Connections and Conditions in History" in William H. Dray (ed.), *Philosophical Analysis and History*, New York, Harper & Row (1966), p. 250, quoted by Zelikow in Ibid., p. 299. Original emphasis.
[53] Edmundo O'Gorman, "Historia y Vida" in Álvaro Matute, *La teoría de la historia en México, 1940-1968*, México, Fondo de Cultura Económica (2015), pp. 153-62
[54] Carlos Pereyra, "Historia, ¿para qué?" in Carlos Pereyra et al. *Historia, ¿para qué?*, Mexico City, Siglo XXI Editores (2005), pp. 9-33

different forces in conflict," warned Carlos Pereyra in 1980.[55] Hence, when confronted with the need to become aware of the fact that interpretation is essential to the historical endeavour, as Alfonso Reyes had argued three decades earlier, Pereyra opened the door to a questioning that seeks to reflect on its usefulness.[56] Such a question finds an initial answer in O'Gorman's own work when he points out that historiographical knowledge "is the way of adapting the past to the demands of the present; that is to say, an operation which consists in placing the past (conceived in the form of a historical fact) at the service of life." In other words, the aim of conscious life "in making its past activity intelligible to itself is to orient itself in the unfolding of its future activity." "This is why it can be said that all historiography is political in the highest sense," O'Gorman concludes.[57]

As stated at the outset, the purpose of this dissertation is to study the strategic behaviour of the leaders of the Mexican state at a foundational moment: the period following the great civil war of 1910. Its starting point is therefore the criterion of applied history, especially since this approach allows us to study the contingent nature of that historical moment with critical rigour. Still, the focus of the thesis lies in the claim to consider the use of force was a central element of Mexican statecraft in that period. In this way, O'Gorman's invitation to address any historiographical endeavour in eminently political terms is particularly relevant for moving into the realm of «strategic studies» and —above all— strategic thought, especially since the use of the military instrument invariably serves political purposes.

Moreover, this bridge between the study of historical behaviour and the domain of strategic phenomena was not unknown in the past. "For centuries, a solid grounding in history was considered essential both to the conduct of statecraft, and to the prosecution of military strategy," notes Iskander Rehman on an essay especially devoted to this very issue.[58] But what then is the purpose of strategic studies? In principle, the focus of strategic studies lies in the aspiration to

[55] Ibid., p. 13
[56] Alfonso Reyes, "Mi idea de la Historia" in Matute, Op. cit., p. 136
[57] O'Gorman in Ibid., p. 177
[58] "From the Ancient Greeks to the Victorians, the careful study of past events lay at the heart of 'practical wisdom,' or prudence, and the mastering of such a historical *techne* was perceived as one of the finest political arts," adds Rehman. Iskander Rehman, "Why applied history matters," Engelsberg Ideas (2020) [online]. In the framework of this dissertation all online sources will be referenced in this way. The corresponding links are included in the final section of sources and bibliography.

understand the relationship between the exercise of armed force and its utility in political terms.[59] However, it is necessary to point out that talking about strategic theory is not the same as talking about strategic thinking: formally, *strategic theory*[60] has been conceived as a resource that aims to study the exercise of military force in a rational way; in contrast, *strategic thinking*[61] has a historical trajectory of its own that precedes any process of theorisation in this field. This point of departure paves the way for the possibility of considering the nature of strategic phenomena from a historical perspective.[62] In this respect, the practice of strategy can be defined as a relationship between ends and means that is guided by the expectation of achieving lasting political effects in the context of a scenario of conflict.[63] Thus, Sir Lawrence Freedman has pointed out that the strategy is required "when others might frustrate one's plans because they have different and possibly opposing interests and concerns."[64]

As for the military sphere, Jeremy Black notes, strategy can be understood as "the way by which nations, states, rulers, élites and others seek to shape their situation, producing international and domestic systems and pursuing outcomes that provide security, and that safeguard and advance interests."[65] This approach is particularly relevant when it comes to the study of the Mexican historical experience as a *domestic system*, especially because it allows us to shed light on the behaviour of the actors involved in the politico-military process that began in 1910. For, in effect, what happened in Mexico during this period can be considered a case study in state-making in which the use of the military instrument holds a central place.

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[59] In this respect, see John Baylis and James J. Wirtz, "Introduction" in John Baylis, James J. Wirtz, and Colin S. Gray (eds.), *Strategy in the Contemporary World*, Oxford, Oxford University Press (2016), pp. 1-15

[60] Thomas G. Mahnken, "Strategic Theory" in Ibid., pp. 56-71. According to Mahnken, "strategic theory provides the conceptual foundation of an understanding of war. It offers a toolkit that can be used to analyse problems of war and peace." Ibid. p. 56

[61] See for instance Beatrice Heuser, *The Evolution of Strategy*, Cambridge, Cambridge University Press (2010), pp. 3-35, and Lawrence Freedman, "Preface" in Op. cit., pp. ix-xvi

[62] An alternative approach, of course, is to regard strategic theory as an autonomous body of knowledge based on the scientific nature of its propositions. Under this approach, the study of the relationship between ends and means would be at the heart of the discipline. In this regard, Smith and Stone argue that strategic theory is based on five key elements: (*1*) the study of ends, ways and means; (*2*) interdependent decision making; (*3*) the study of the political actor as the central unit of analysis; (*4*) the understanding of value systems and preferences; (*5*) the assumption of rationality; and (*6*) the maintenance of moral neutrality. "These six features," they conclude, "constitute the core of strategic theory. M. L. R. Smith and John Stone, "Explaining Strategic Theory," *Infinity Journal*, vol. 4 (2011), pp. 27-30

[63] Gray, Op. cit., pp. 166-72

[64] Freedman, Op. cit., p. xi

[65] Jeremy Black, *Military Strategy: A Global History*, New Haven, Yale University Press (2020), p. ix

Moreover, Professor Black has also made a clarification that in a way anticipates much of what will be discussed in this dissertation: the historical evidence at our disposal allows us to understand that there are societies, such as those in Latin America, in which the use of the military instrument has answered to internal or domestic demands of a genuinely strategic nature.[66] In this regard, Black notes the following:

> Far from there being such a single Western way of war, there were, and still are, a variety of military cultures and practices within the West, ranging from conflict with other regular forces to counterinsurgency and policing operations. Rather than, as is usually done, treating the latter as in some ways lesser forms of warfare that, at the most, represented adaptations of existing methods, it is necessary to appreciate the pluralistic nature of warfare and then to build this into theoretical discussions about the processes of military development.[67]

This remark is particularly relevant when talking about Mexico, a country that, according to Alain Rouquié,[68] is part of the «Extreme West»; that is to say, of a historical universe that was forged from the sixteenth century onwards thanks to the invention of America as a space of promise for the modernity that came from Europe.[69] "Between Columbus and Rousseau, the West is dominated by the idea of space: the Golden Age and the Good Savage are elsewhere, in the New World," noted Carlos Fuentes in 1982, just a decade before the commemoration of the quincentenary of the beginning of that invention.[70] This spatial reality became a geopolitical imperative in Mexico only when the country's ruling elites considered the relevance of establishing a centralised political authority on its territory: from the eighteenth century onwards, that imperative has dictated the pertinence of resorting to the military instrument to achieve such a purpose.

Since then, the possibility of resorting to a standing army to impose Mexico City's authority has become a recurrent feature of the Mexican political experience. This is not surprising: as Black has pointed out, the need to establish an enduring relationship between the ends pursued by the ruling elite of a political community and the means at its disposal is a dynamic process that reflects that

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[66] Jeremy Black, *Rethinking Military History*, London, Routledge (2004), pp. 1-25
[67] Black, Ibid., pp. 1-2
[68] Alain Rouquié, "Introducción" in *Extremo Occidente*, Buenos Aires, Emecé Editores (1990), pp. 15-34
[69] Edmundo O'Gorman, *La invención de América*, Mexico City, Fondo de Cultura Económica (1958), pp. 77-100
[70] Carlos Fuentes, "Europa y Latinoamérica," *Revista de la Universidad de México*, no. 12 (1982), p. 11

community's historical experience, especially its material, political and social circumstances. Over time, these circumstances shape a discernible strategic culture within a certain space of experience that is projected into the future.[71]

Ultimately, the Mexican historical experience is also relevant when it is compared to the trajectory of other Latin American societies over the last two hundred years. "The particular conditions that defined the process of state creation on the continent precluded the type and consequences of state-making war", pointed out Professor Miguel Ángel Centeno a couple of decades ago.[72] With this statement, Centeno wanted to highlight the fact that Latin American societies never experienced the total war scenarios that forged Europe's political identity during the same period. And yet, Mexico's historical experience is a unique case within this general landscape: as we shall see, the civil war that the country endured between 1910 and 1920 is now considered by some scholars as a true total war fought within the same political community.[73] From this perspective, the study of the Mexican historical experience is presented as a case study that offers the opportunity to understand the way in which the strategic culture of a society located on the margins of the Western world was constituted.[74]

To understand this assertion, it is necessary to pay attention to the arguments concerning the notion of a Mexican «exceptionality» within the framework of the twentieth-century Latin American historical experience.

1.3. Methodology: a critical observation of the writing of Mexican history

This dissertation seeks to develop an argument about the way in which Mexico's strategic culture was constituted in the early decades of the last century. By studying the case of Mexico in this way, the thesis seeks to pay attention to the set of experiences that shaped that strategic culture within a given historical context. This approach is particularly useful if one wants to

[71] Black, Op. cit., p. 4
[72] Miguel Ángel Centeno, *Blood and Debt: War and the Nation-State in Latin America*, University Park, Penn State University Press (2003), p. 20
[73] Alan Knight, "Guerra total: México y Europa, 1914," *Historia Mexicana*, vol. lxiv, no. 4 (2015), pp. 1583-1652
[74] Concerning the perils and advantages of this approach consult Jeremy Black, "The sound of guns: military history today" in Ibid., pp. 55-58

understand the role that the Mexican statesmen assigned to the military instrument in the framework of a grand-strategic behaviour that is, in principle, only discernible in retrospect. To articulate this argument, this thesis draws on a number of sources that have long been available to any scholar interested in studying the Mexican military question with a critical eye.

Consequently, this thesis does not postulate a return to archival sources that have not yet been explored by scholars in Mexico. Rather, it proposes an assessment of those sources related to the study of modern Mexican history that can be useful in reinterpreting what happened between 1917 and 1929, the period that laid the foundations of the modern state in Mexico. In doing so, it postulates the need to access these sources by drawing on the theoretical resources provided by applied history and strategic studies. Only by drawing on such resources is it possible to study the conditions of possibility that defined the experience of the protagonists of that historical moment and the nature of the strategic challenges they faced. This, on the understanding that the responses that they gave to those challenges exert a lasting influence on the grand narratives that guide the behaviour of any given society.

Accordingly, this dissertation aims at a critical reading of the historical research already carried out in this field, especially by considering that the sources examined in this study are testimonies that give an account of how Mexico's politico-military experience has been interpreted. As a Mexican scholar suggested some time ago, this criterion allows for an *observation* of the observations of the past that is particularly useful for noticing how the discourse on the subject has been shaped over time.[75] As a matter of fact, notes Alfonso Mendiola, we do not explain the past, "we explain observations about the past —or, rather, we explain the past only insofar as we have considered it in the light of some kind of verbal description or specification."[76] In line with Sir Michael Howard, it is possible to state that, in any case, the scholar must be aware "that he is studying not what happened in the past but what historians *say* happened in the past."[77] With this approach in mind, this dissertation aims to make use of a series of observations from the past in relation to the Mexican military question. The aim is to reinterpret Mexico's historical experience in the light of

[75] Alfonso Mendiola, "El giro historiográfico: la observación de observaciones del pasado," *Historia y Grafía*, vol. 8, no. 15 (2000), pp. 509-37
[76] Ibid., p. 511
[77] Howard, Op. cit., p. 212

what the field of strategic studies can tell us about the behaviour of the protagonists of the historical process in a given period.

Within this framework, there are several common threads running through the Mexican historical experience that need to be considered. The first of these threads relates to the tensions caused by a process of political centralisation that began in the late eighteenth century. In effect, any account of what has happened in Mexico since 1910 cannot ignore what occurred in the previous period: that space between 1750 and 1850 in which, according to Koselleck, emerged many of the categories that today shape the political discourse of modernity.[78] This is the same space of experience in which the kingdom of New Spain transitioned from dependence on the Hispanic Monarchy to that of an independent nation, in the context of a process of political modernisation that required the establishment of standing armies to assert Mexico City's political authority over a vast territorial mosaic that once stretched from the Central American Isthmus to the margins of the Oregon.[79] Thus, from the 1760s onwards, Bourbon Mexico saw the creation of provincial militias and permanent army corps. These were initially conceived to counter the threat of British expansion in the context of the disputes generated by the Seven Years' War (1756-63) on the American continent.[80]

In fact, the decision to establish a standing army in the late eighteenth century set the precedent for a grand-strategic behaviour that was to prove enduring: since then, Mexico's ruling elites have consistently resorted to the use of the military instrument to further the process of political centralisation on which the construction of the modern Mexican state has rested.

This behaviour, which in reality represents a strategic orientation *from above*, soon found a correlate in the resistance of those sectors of Mexican society that considered the centralisation promoted from the centre a threat to their interests and ways of life: over the last two hundred years the use of the military instrument has thus found a strategic response *from below* that has at

[78] Reinhart Koselleck, "Introduction and Prefaces to the '*Geschichtliche Grundbegriffe*'," *Contributions to the History of Concepts*, vol. 6, no. 1 (2011), pp. 7-25
[79] Eric Van Young, "Introduction" in Op. cit., *Stormy Passage*, pp. 3-14
[80] Eric Van Young, "Signs of Stresss, Efforts at Reform" in Ibid., pp. 69-102. Cf. with Christon I. Archer, "El dilemma del gachupín" in Op. cit., pp. 23-58

various times challenged the political designs conceived in Mexico City.[81] It was also the starting point used by city councils and local governments to reclaim spaces of autonomy from the central power exercised from Mexico City. This is a second thread running through this thesis: whenever the central government sought to impose its decisions at the national level, it found regional political actors and local communities willing to contest the hegemony exercised from Mexico City. At various times, the possibility of resorting to arms was presented as the only possible response to the intransigence of the centre.

The experience of Mexican society has thus been defined not by its participation in major international conflicts, but by the persistence of civil war. As Josefina Zoraida Vázquez has aptly suggested, the nineteenth century in Mexico was not a century of military dictatorships, but of civil wars, of which the Three-Year War (1858-61) was perhaps the most immediate precursor to the revolutionary war that the country would experience in the second decade of the twentieth century.[82] In fact, it was not until 1876 that the central government in Mexico City was able to exercise the kind of political authority coveted by its predecessors: thanks to the energetic action of General Porfirio Díaz at the end of the nineteenth century, the country enjoyed a period of relative political stability, cultural dynamism and growing material prosperity. This period of order and growth only came to an end when the exhaustion of the regime opened the door to a new period of politico-military violence.[83]

From this perspective, the experience of the Mexican Revolution (1910-20) can be seen as a turning point in the long duration of the Mexican historical experience: a moment of political fracture in which Mexico's rulers had to resort to a new grand-strategic orientation in order to establish a revolutionary state capable of coping with the many internal and external demands that were intensely manifested in the first half of the last century. This is, in fact, a central thread running through this dissertation. In effect, from 1917 onwards, the need to re-establish the authority of a national government over the armed actors that had emerged as a result of the revolutionary war became one of the central priorities of the new order. In the light of the above, the possibility of

[81] See, for instance Alan Knight, *The Mexican Revolution*, vol. 2, Counter-revolution and reconstruction, Lincoln, University of Nebraska Press (1990), pp. 496-99
[82] Josefina Zoraida Vázquez, "Un viejo tema: el federalismo y el centralismo," *Historia Mexicana*, vol. 42, no. 3 (1993), p. 622
[83] Paul Garner, *Porfirio Díaz: Entre el mito y la historia*, Mexico City, Crítica (2015), pp. 153-314

studying what happened between 1917 and 1929 finds its first point of departure in the works published since the middle of the last century by a group of scholars from the United States, Mexico and the United Kingdom. Of particular relevance are the works published between the 1970s and 1990s by scholars such as Alan Knight,[84] Charles Cumberland,[85] and Friedrich Katz,[86] which in general offer a panoramic view of what happened in the context of the great civil war that Mexico experienced from 1910 onwards. Along the same lines are the works of scholars such as Javier Garciadiego, Luis González, Álvaro Matute, Luis Medina, Lorenzo Meyer and Berta Ulloa, compiled as part of the collections published by El Colegio de México at the end of the decade.[87]

This dissertation has considered these sources seriously, especially because they provide an account of the complexity of the Mexican revolutionary process in the first decades of the last century. These are valuable works, that have established a consensus on the periodicity and the main themes of study of the period. At the same time, it has also consulted a set of primary sources that have been republished in recent years thanks to the work of the Instituto Nacional de Estudios Históricos de las Revoluciones de México (National Institute of Historical Studies of the Mexican Revolutions).[88] No less valuable was the collection of journals and magazines available to researchers in the Hemeroteca Nacional Digital de México (Mexico's National Digital Newspaper Archive),[89] as well as the materials published on the portal of the Fideicomiso Archivos Plutarco Elías Calles y Fernando Torreblanca (Plutarco Elías Calles and Fernando Torreblanca Archive Trust). These are facsimiles or primary sources reproduced in new editions in the care of the Institute, which were very useful in re-interpreting some of the debates of the time and the meaning of the political programme proposed by the leaders of the Revolution. This is the case, for example, with the *Diario de Debates* of the Constituent Congress held in Querétaro at the end of 1916.Finally, this

[84] Alan Knight, *The Mexican Revolution*, Lincoln, University of Nebraska Press (1990), vols. 1-2
[85] Charles C. Cumberland, *La Revolución Mexicana: Los años constitucionalistas*, Mexico City, Fondo de Cultura Económica (1975), pp. 388
[86] Friedrich Katz, *De Díaz a Madero: Orígenes y estallido de la Revolución Mexicana*, Mexico City, Era (2004), pp. 118
[87] The collection was coordinated by Luis González in collaboration with the aforementioned scholars and many other renowned authors. See *La Revolución Mexicana*, Mexico City, El Colegio de México (1978), vols. 1-23
[88] One example is the reprint of the parliamentary debates held in Querétaro from December 1916. See *Diario de los Debates del Congreso Constituyente 1916-1917*, Mexico City, Instituto de Estudios Históricos de la Revolución Mexicana (2017), vols. 1-3
[89] In particular, thanks to the digital reproduction of period newspapers such as *El Demócrata* (1914-26), and *El Pueblo* (1914-19).

dissertation also drew secondarily on the documentary holdings of the Intelligence Division of the US War Department, a resource that is available in electronic format as part of the Maughan Library collection at King's College London. These materials were particularly useful when estimating the magnitude of the counterinsurgency campaign waged by the government of the Revolution since 1926 in the context of the Cristero War.

With regard to the political and institutional history of the Mexican Army, the work of Edwin Lieuwen, published in 1968, stands out as one of the first serious contributions to the study of this subject.[90] For years, Lieuwen's conclusions were in line with the story promoted by the regime in relation to the Mexican military question and were echoed in the work of such renowned scholars as Pablo González Casanova, who around 1965 observed that the Mexican Army no longer had any substantive influence within Mexico´s political system.[91] Over time, other works have approached the study of the Mexican military question with greater critical rigour. Thus, it is worth highlighting the work carried out subsequently by scholars such as Alicia Hernández Chávez,[92] Mario Ramírez Rancaño[93] and José Manuel Villalpando,[94] among others. In general, the work of these scholars is not limited to what happened in the last century: for most of them, what happened during the nineteenth century was an important precedent for understanding how the permanent armed force was subsequently shaped in Mexico during the Revolution. In addition to these works, two as yet unpublished graduate theses are particularly relevant: that of Robert Carriedo,[95] published in 2005, and that of Shawn Louis England,[96] published in 2008. These are two meticulous exercises

[90] Edwin Lieuwen, *Mexican Militarism: The political Rise and Fall of the Revolutionary Army, 1910-1940*, Albuquerque, The University of New Mexico Press (1968), pp. xvi-194

[91] Pablo González Casanova, *La democracia en México*, Mexico City, Editorial Era (1965), pp. 50-52

[92] Alicia Hernández Chávez, *Las fuerzas armadas mexicanas: Su función en el montaje de la República*, Mexico City, El Colegio de México (2012), pp. 165

[93] Mario Ramírez Rancaño, "La república castrense de Victoriano Huerta," *Estudios de Historia Moderna y Contemporánea de México,* no. 30 (2005), pp. 167-213. Un año más tarde, Ramírez Rancaño publicó un ejercicio especialmente relevante en la misma publicación: "Una discusión sobre el tamaño del ejército mexicano: 1876-1930," Ibid., no. 32, 2006, pp. 35-71

[94] Villalpando's approach to the historical development of the National Guard is particularly noteworthy. In this regard, see José Manuel Villalpando, "La evolución histórico-jurídica de la Guardia Nacional en México" in Beatriz Bernal (coord.), *Memoria del IV Congreso de Historia del Derecho Mexicano*, Ciudad de México, Instituto de Investigaciones Jurídicas, 1986, pp. 1118-28

[95] Robert Carriedo, *The man who tamed Mexico's tiger: General Joaquin Amaro and the professionalization of Mexico's revolutionary army*, Doctoral Dissertation, Albuquerque, The University of New Mexico (2005), pp. xvi-250

[96] Shawn Louis England, *The curse of Huitzilopochtli: The origins, process, and legacy of Mexico's military reforms, 1920-1946*, Doctoral Dissertation, Phoenix, Arizona State University (2008), pp. vi-459

which, especially in the case of Carriedo's work, provide a very precise interpretation of the strategic needs of the period.

These works are complemented by the work of Pedro Castro, Martha Loyo Camacho and Enrique Plascencia de la Parra, scholars who have paid particular attention to the period that we are dealing with in the context of this thesis. The work of Plascencia de la Parra describes the efforts made to professionalise the army after 1917,[97] while Loyo Camacho presents a biographical account of the figure of Joaquín Amaro,[98] the great military reformer who led these efforts during that period. For his part, the work of Pedro Castro allows us to better understand the meteoric rise of Álvaro Obregón,[99] the undefeated general at the service of the Constitutionalist Movement who, from 1920 onwards, became a Caudillo jealous of his prerogatives in a country ruled at the local level by a myriad of caciques and strongmen.

The aforementioned works are complemented by the historiographical work carried out in recent years: of all the works published recently, the work of Thomas Rath stands out in particular. In 2013 Rath published a book that challenges the demilitarisation myth of the Mexican political process in the aftermath of the Mexican Revolution.[100] Rath's position on this issue is indicative of another thread running through this dissertation: the need to question the prevailing narrative concerning the military question in Mexico. According to Rath, the demilitarisation narrative must be questioned if one really wants to understand the role played by the military within the political system that prevailed in Mexico throughout the last century.[101] Just a couple of years before, a work by Ben Fallaw and Terry Rugeley emphasised the same idea, but at the same time pointed out that historians "cannot study militias and the army as purely military institutions, and one way of

[97] Enrique Plascencia de la Parra, *Historia y organización de las fuerzas armadas en México, 1917-1937*, Mexico City, Universidad Nacional Autónoma de México (2010), pp. 416
[98] Martha Beatriz Loyo Camacho, *Joaquín Amaro y el proceso de institucionalización del Ejército Mexicano*, 1917-1931, Mexico City, Miguel Ángel Porrúa (2010), pp. 194
[99] From Pedro Castro see *A la sombra de un caudillo: vida y muerte del general Francisco R. Serrano*, Mexico City, Random House Mondadori (2005), pp. 296, and *Álvaro Obregón: Fuego y cenizas de la Revolución Mexicana*, Mexico City, Ediciones Era (2009), pp. 638
[100] Thomas Rath, *Myths of Demilitarization in Postrevolutionary Mexico, 1920-1960*, Chapel Hill, The University of North Carolina Press (2013), pp. xi-244
[101] Ibid., p. 81

expanding the focus is to read the militias and military as key agents of state formation with political, social, economic, and even cultural ramifications."[102]

Within this new orientation, the reflections of scholars such as Benjamin T. Smith[103] and Paul Gillingham[104] stand out, as they have highlighted the ambivalent position of many of the military commanders who collaborated in the construction of the Mexican state in the period between the 1920s and the 1960s. As with Rath's book, the work of these scholars has opened the door to a wide-ranging debate concerning the construction of the modern State in Mexico and, in this context, about the utility of the military instrument as part of a state-building enterprise. At the same time, this body of work has challenged the thesis that such a Golem was the repository of an uncontested strength: the Mexican state described by these authors is in fact an imperfect structure of domination, subject to structural vulnerabilities that make it constantly seek turbulent partners at the local level in order to maintain an effective political hegemony.[105] In effect, it was a state in which the public powers were often captured to satisfy the needs and ambitions of actors who did not represent the general interest of the political community.

For this reason, David Nugent argues that the institutional approach derived from the Weberian tradition is insufficient to account for Mexico's complex historical experience.[106] Rather, in order to study the Mexican experience, it is necessary to use a broader approach capable of taking into account the cultural dimensions of that experience, especially when studying "how the organization of armed power affected processes of social reproduction."[107] This approach is particularly productive when considering the rationale behind the narratives that favoured the thesis of a Mexican political exceptionality, presenting the army as a guarantor of the programme of the Mexican Revolution:

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[102] Ben Fallaw and Terry Rugeley, "The Challenges of Scholarship on the Mexican Military Experience" in Ben Fallaw and Terry Rugeley (eds.), *Forced Marches: Soldiers and Military Caciques in Modern Mexico*, Tucson, The University of Arizona Press (2012), p. 13

[103] Benjamin T. Smith, "Heliodoro Charis Castro and the Soldiers of Juchitan" in Ibid., pp. 110-35

[104] Paul Gillingham, "Military Caciquismo in the PRIísta State" in Ibid., pp. 210-37

[105] In effect, the bandits, gunmen and strongmen active in Mexico during the first decades of the last century foreshadowed the "turbulent partners" of the state who today, according to Romain Le Cour Grandmaison, exercise intermediary functions from the local level.
Le Cour Grandmaison, Op. cit., pp. 58-63

[106] David Nugent, "Reflections on State Theory through the Lens of the Mexican Military" in Fallaw and Rugeley, Op. cit., pp. 238-68

[107] Ibid., p. 241

> Gillingham shows that the "army as servant of the nation" perspective is anything but a neutral description. Rather, it is a highly interested *claim*.[108]

In this way, the narrative developed throughout the last century concerning the military question in Mexico is revealed as a device designed to preserve the interest of the officer corps, especially if the latter is considered as a power group with a specific weight within the Mexican political system. As a result, "the assertion that the military was finally depoliticized circa 1950 is for the most part an *official* view —a representation to which both civilian and military branches of government have been deeply committed. Such an assertion does important cultural work," Nugent concludes. A work, no doubt, with concrete political consequences:

> On the one hand, it conceals the kinds of coercive processes that Gillingham documents with such care —the violence visited so routinely and extensively upon subaltern groups by the military and its civilian allies. Representing the military as the handmaiden of the people, however, has an additional consequence. It also calls into question efforts to transform the status quo. By tying the fate of the armed forces to that of the people —by seeing them as one and the same— challenges to the established order are converted into challenges to popular rule itself.[109]

In essence, Nugent concludes, this approach allowed for the rhetoric of the Mexican Revolution to be used in order to mask the true nature of the power relations that defined the military's place within the Mexican society.

This is precisely where the confabulation was set in motion: the process began when the leaders of the Mexican revolutionary state were forced to invent a new past in order to move forward in the construction of the future. This only happened around the third decade of the last century, when the recent past was used to create a historical narrative useful to the needs of the Mexican Revolution in its enterprise of national reconstruction. According to this logic, the invention of a revolutionary past in which the armed forces were always subservient to grand national purposes was part of that process.

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[108] Ibid., p. 246
[109] Ibid., pp. 246-47

Therefore, it is essential to study the origins of the narratives used by the regime of the Mexican Revolution to underpin its legitimacy. Only in this way is it possible to explore the place of the army within the power architecture that emerged in Mexico at the end of the great civil war of 1910. And yet, Nugent's approach says little about the real utility of the military instrument in those moments when the revolutionary regime faced armed opponents willing to challenge its nascent hegemony.[110]

To address the latter question, this dissertation claims that Mexican rulers of the period did not act merely as self-interested operators of a system from which they reaped multiple symbolic, political and material benefits. Rather, they all faced the challenge of constituting a sovereign centre capable of extending effective rule on a national scale while withstanding pressure from abroad. Thus, the efforts of figures such as Carranza, Obregón or Calles cannot be understood without taking seriously the call to exercise that sovereign function from the perspective of a presidential authority imbued with such a sense of purpose.

Similarly, the call for the professionalisation of the National Army cannot be understood without paying attention to the type of state the Mexican military *believed* it was serving: according to Carriedo, the professionalisation process promoted by General Joaquin Amaro in the late 1920s and the early 1930s was successful to the extent that the National Army embraced the tenets of the Mexican Revolution.[111] Considered as a great military reformer, Amaro is an archetypal figure in the narrative embraced by the revolutionary state in the decades that followed.[112] However, the real Amaro is very different —and indeed more complex and interesting— than the bronze figure the regime made of him. This is why the political (*die Politik*), understood as the sphere in which the decisions that guide the course of any political community are forged, is a reference that must be taken seriously when explaining the strategic behaviour of those who have assumed governmental

[110] For the implications of Nugent's approach see Ibid., pp. 250-66
[111] Carriedo, Op. cit., pp. 226-38
[112] Martha Beatriz Loyo Camacho, *Joaquín Amaro y el proceso de institucionalización del ejército mexicano, 1917-1931*, Mexico City, Miguel Ángel Porrúa (2010), pp. 121-49

responsibilities.[113] To understand how this is so, it is worth looking again at the process that allowed for the construction of a singular revolutionary narrative in Mexico over the last century.

2. A revolutionary narrative: Mexico as a grand-strategic actor in the twentieth century

As previously noted, this dissertation claims that the narrative that guided Mexico's strategic behaviour over the last century was the product of a large-scale confabulation process. That is to say, as a narrative constructed in retrospect to justify the behaviour of a political community and its leaders over time. To understand this assertion, it is necessary to briefly review Mexico's grand-strategic behaviour over the last century. Beyond the official discourse, which in the post-war period portrayed Mexico as a peace-loving country willing to fight for the principles enshrined in the United Nations Charter, and later as a champion of the Third World, a complex strategic behaviour emerges, driven by domestic needs that had to be reconciled on many occasions with the demands of the United States. Thus, Mexican rulers had to reconcile their own aspirations with the geopolitical realities of their immediate neighbourhood.

In the end, the behaviour of the regime of the Mexican Revolution was shaped by a singular grand-strategic framework: on the one hand, the conduct of foreign policy was decided in a separate space, alien to that in which tasks related to national security and defence were defined. On the other hand, the use of the military instrument was reserved for dealing with domestic challenges. Even today the separation of these state functions is one of the most notable features of the Mexican political system: since the beginning, the use of the military instrument in Mexico was destined for purposes related to the preservation of internal security, while foreign policy followed a path apparently unrelated to such circumstances.[114] However, it must be stressed that these are two dimensions of a single grand-strategic behaviour aimed at ensuring domestic political stability and avoiding foreign intervention.

[113] Beatrice Heuser, "Clausewitz, *Die Politik*, and the Political Purpose of Strategy" in Thierry Balzcq and Roland R. Krebs (eds.), *The Oxford Handbook of Grand Strategy*, Oxford, Oxford Univeristy Press (2021), p. 62

[114] I am recovering here a set of considerations I published in the autumn of 2021. Alexis Herrera, "México en el espejo de Alemania," *Foreign Affairs Latinoamérica* (2021) [online].

In the long run the divorce that separated foreign policy from the security and defence agenda proved contradictory: in the major multilateral fora of the time, Mexican diplomats could appeal to the values of the liberal world order built in the post-war period, even though within its borders the Mexican State' security apparatus was often used to carry out repressive tasks inherent to a markedly authoritarian regime.[115] Over time, this circumstance generated a singular «strategic culture»: that is to say, a particular way of understanding the relationship between the country's historical experience, its political values and the utility of the military instrument when making possible the achievement of the major purposes of the modern State in Mexico.[116]

2.1. The Mexican revolutionary experience and the origins of a singular strategic narrative

To understand what has been said so far, it is necessary to pay attention to the trajectory of the regime of the Mexican Revolution from a long-term perspective. There was a moment between 1917 and 1929 when the new order of things established in Mexico had no clear contours. For some, the return to constitutional order meant the possibility of restoring the democratic political process that the country saw interrupted since 1910. For others, the military triumph of the revolution meant something else: the right to exercise power after their participation in the armed struggle. For all, the expectation of building a new social order in Mexico found a central reference point in the rhetoric of «revolutionary nationalism» under an agenda of change that promised progress and social justice for all Mexicans. According to Rafael Segovia, this agenda granted a preponderant role to workers and peasants, but at the same time made the Mexican state as the supreme arbiter of national life. Its decisions, he noted in a famous essay published in 1968, "cannot be resisted by anyone: not even by the law." "There is, then, a national interest represented and defended by the state, and exclusively by the state."[117]

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[115] Jorge Luis Sierra Guzmán, "Armed Forces and Counterinsurgency: Origins of the Dirty War (1965-1982)" in Adela Cedillo and Fernando Herrera (eds.), *Challenging Authoritarianism in Mexico*, New York, Routledge (2012), pp. 182-197

[116] As is well known, one of the first scholars to use this term was Jack Snyder in 1977. "Snyder suggested that elites articulate a unique strategic culture related to security-military affairs that is a wider manifestation of public opinion, socialized into a distinctive mode of strategic thinking." To a large extent, this phenomenon responds to the historical trajectory of each society. Jeffrey S. Lantis y Darryl Howlett, "Strategic Culture" in John Baylis, James J. Wirtz, and Colin S. Gray (eds.), *Strategy in the Contemporary World*, Oxford, Oxford University Press (2019), p. 92

[117] Rafael Segovia, "El nacionalismo mexicano: los programas políticos revolucionarios, 1929-1964," *Foro Internacional*, vol. viii, no. 4 (1968), p. 359

Yet, what happened between 1917 and 1929 belies the thesis that this moment of revolutionary change followed a linear direction that could be discerned from the outset: between the civilianism of President Carranza and the new authoritarian state imagined by General Calles at the end of this period, the country always lived in the shadow of armed violence. The solution, as the poet Octavio Paz suggested several decades later, was a compromise between the two extremes: the construction of a model of political domination based on the existence of a hegemonic party headed by a strong presidency.[118] In a way, the existence of this party is one of the central elements of the Mexican exceptionality in the last century: while other Latin American societies fell into the hands of military dictatorship, in Mexico the Party of the Revolution guaranteed the stability of a political system that formally maintained the façade of a functioning democracy between 1929 and 2000.[119] In effect, established in 1929 as the National Revolutionary Party, reconstituted in 1938 as the Party of the Mexican Revolution, and finally re-founded in 1946 as the Institutional Revolutionary Party, this capacity for constant reinvention was one of the great virtues of the party founded by Calles.

In the same period the Mexican armed forces were removed from effective civilian control. As a result, Mexico´s civil society never developed its own vocabulary to guide the civil-military dialogue in a truly democratic way. When political alternation finally came to Mexico, the country never experienced an equivalent «military transition» as other societies in Mediterranean Europe and South America did in the 1970s and beyond.[120] In this way, the discourse constructed by the regime that ruled Mexico after 1929 sought to highlight the virtues of its own political exceptionality, defined by a kind of «authoritarian civilianism»[121] which, especially after 1945, allowed a direct tie to be established between the President of the Republic and the High Command of the Mexican

[118] Octavio Paz, "Hora Cumplida," *Vuelta*, no. 143 (1988), pp. 46-47

[119] For an overview of this issue consult Rogelio Hernández Rodríguez, *Historia Mínima del Partido Revolucionario Institucional*, Mexico City, El Colegio de México (2016), pp. 291

[120] This expression was coined by Narcís Serra in a work published in 2010. Echoing the work of S. E. Finer, the former Spanish Minister of Defence noted that the only way to deal with the dilemmas generated by the military question "is for the military to accept that its subordination to civil power is an entirely necessary prerequisite for a country to function in a democratic way." Narcís Serra, *The Military Transition*, Oxford, Oxford University Press (2010), p. 3

[121] The expression was originally coined by Alain Rouquié in 1982. "In fact, the military are in a certain way one of the pillars of the coalition along with the PRI, the presidency, and the trade unions." Alain Roquié, "Civilian Authoritarianism and the Demilitarization of Political Life in Mexico" in *The Military and the State in Latin America*, Berkeley, University of California Press (1987), p. 206

Army.[122] Since then, this way of conceiving the nature of civil-military relations has cast a long shadow over the way in which civil society has approached the «military question» in Mexico, understood as an expression of the settlement that strives to resolve the place that the military should occupy within any political community.

On the other hand, to speak of a military question in Mexico is to pay attention to the way in which the «military policy» of the regime of the Mexican Revolution was articulated throughout the last century.[123] In this respect, the image cultivated by those who held power in Mexico in the middle of the last century was very punctual: it was the image of a country in which the need to ensure the subordination of the military to the civilian establishment had been resolved from the outset in a way that favoured the latter. Real or imagined, the broad powers vested in the figure of the President of the Republic were seen as a guarantee of stability that underpinned the political legitimacy of the regime of the Mexican Revolution. In the context of the Cold War, this was no small matter, especially given Mexico's geographical proximity to the United States. Indeed, the apparent failure of communism in Mexico was seen as one of the most enduring legacies of the political regime that was established in the country at the end of the great civil war of 1910.[124]

Perhaps fascinated by this fact, the American diplomat S. Walter Washington sought to reflect on the reasons why communism had not succeeded in the country where he had served as Career Consul since October 1945.[125] His conclusions were presented in April 1958 in an issue of *Foreign Affairs* that also featured the names of Dean Acheson and Henry Kissinger.[126] Antonio Carrillo

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[122] Jesús López González se ha referido a esta circunstancia, señalando que se trató de una modalidad de «subordinación exclusiva» que escapó a un control civil democrático efectivo, toda vez que excluyo a otros poderes del Estado de la posibilidad de ejercer una supervisión real sobre los militares. Jesús Alberto López-González, *The Politics of Civil-Military Relations in Mexico: A Historical and Institutional Approach*, Doctoral Dissertation, London, The London School of Economics and Political Science (2008), pp. 13-15, 55-62

[123] That is to say, "the sum of actions and measures with which the executive directs the military within the administration of state and in its relations with society." Serra, Op. cit., p. 79

[124] Lorenzo Meyer, "La guerra fría en el mundo periférico: el caso del régimen autoritario mexicano. La utilidad del anticomunismo discreto" in Daniela Spenser, *Espejos de la guerra fría: México, América Central y el Caribe*, Mexico City, Miguel Ángel Porrúa (2004), pp. 95-117

[125] "Exequatur Núm. 19 concedido al señor S. Walter Washington para ejercer las funciones de Cónsul de Carrera de los Estados Unidos de América en México, D.F.," *Diario Oficial de la Federación*, vol. clvi, no. 42 (18 June 1946), p. 1. At the time of his article's publication, Washington was a professor in the Woodrow Wilson Department of Foreign Affairs at the University of Virginia. In this respect, see "Front Matter", *Foreign Affairs*, vol. 36, no. 3 (1958), p. 370

[126] Acheson's article censured the position of those who wanted an America disengaged from world affairs. Dean Acheson, "The Illusion of Disengagement" in Ibid., pp. 371-82. In contrast, Kissinger's one pondered the

Flores, then Mexican Finance Minister, also published an article in that issue in which he noted that by the end of the 1950s, Mexico had become "one of the fastest growing economies in the world."[127] After making this point, the Minister opened his remarks by pointing out that Mexico was one of the few "constitutional democracies" that was in that condition at the end of the decade.[128]

The expression is significant because it is directly related to the way Walter Washington interpreted the nature of the Mexican political system at the time.[129] For the American diplomat, the reasons why communism had not found a favourable environment in Mexico were closely related to the country's revolutionary experience and, in particular, to the originality of the constitutional order established at the end of the civil war that began in 1910:

> The ideals of the Mexican Revolution were incorporated in the 1917 Constitution and, in the 40 years that have since elapsed, a constitutional government has brought Mexican practices remarkably close to those ideals —closer than many people would have predicted a few years ago. Remarkably too, these ideals have dominated the army.[130]

According to Washington, the originality of this experience led to a political system renowned for its stability and high degree of predictability. Subordinated to civilian power, the military instrument soon became a resource at the service of two central actors in the Mexican political system: the President of the Republic and the Party of the Revolution.

Of course, the American diplomat was not blind to the fact that the renewal of elected offices in Mexico did not take place under conditions of genuine democratic electoral competition but, at the same time, neither did he doubt about the widespread legitimacy achieved by the Mexican political system in those years. "This is not democracy in our sense of the term," concluded Washington, "but the system has granted real political stability to the country while national energies were devoted to economic and social development."[131] Like many other figures of the time, Walter

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implications of crafting a sensible missile strategy and a credible deterrence policy vis a vis the development of new Soviet capabilities. Henry A. Kissinger, "Missiles and the Western Alliance" in Ibid., pp. 383-400

[127] Antonio Carrillo Flores, "Mexico Forges Ahead," Ibid. p. 491

[128] Loc. Cit.

[129] S. Walter Washington, "Mexican Resistance to Communism," in Ibid., pp. 504-14

[130] Ibid., p. 505

[131] Loc. cit.

Washington thus seemed to confirm the exceptional character of the political system that had been consolidated in Mexico during the first half of the last century. That is, the image of a country in which the march towards modernity had become a national enterprise driven by a strong state in the hands of an enlightened civilian leadership. This image is at the heart of the narrative that the Mexican Revolution projected to the world during those years.

From this perspective, the definitive subordination of the military to a civilian presidency was presented as a natural outcome of the Mexican revolutionary experience. This happened for the first time in 1945, when General Manuel Ávila Camacho endorsed the presidential candidacy of Miguel Alemán Valdes, a law graduate from the National University. In fact, it was during Ávila Camacho's administration (1940-45) that Mexico took definitive steps to consolidate its reinsertion into the international arena: in the summer of 1942 the country declared the existence of a state of war with the Axis powers; in doing so, it stepped up its politico-military dialogue with the United States.[132] Domestically, Avila Camacho called for national unity and prepared the country for the post-war world with an ambitious programme of economic reform that reconciled the Mexican Revolution with the private sector and foreign investors. As a result, when Miguel Alemán Valdés became President in December 1946, Mexico apparently ushered in a new era of material prosperity and political stability that would last for decades.[133] Thus, in 1960 the regime commemorated the jubilee of the Mexican Revolution by proclaiming to the world the uniqueness of the Mexican historical experience.

However, this singular experience was not always recognised abroad. Contrary to the teleological approach that at mid-century presented the course of the Mexican Revolution as a success story, the reality of what happened in the first decades of the last century presents a much more complex mosaic. Between 1913 and 1917 the impact of the Mexican revolutionary war on the economic interests of the great powers led to a growing international isolation that would not end until a decade later. As the Mexican Revolution claimed ownership rights of key assets such as foreign-financed oilfields and intervened in favour of agrarian distribution and organised labour, its efforts were seen as a threat to the interests of the powers that had previously invested in Mexico's

[132] Halbert Jones, "Mexico Enters the Global Conflict" in *The War Has Brought Peace to Mexico*, Albuquerque, University of New Mexico Press (2014), pp. 57-96
[133] Ryan M. Alexander, "Alemán's Revolution" in *Sons of the Mexican Revolution*, Albuquerque, University of New Mexico Press (2016), pp. 79-122

economic development: Britain, France and the United States.[134] Furthermore, the existence of multiple armed factions in this early period highlighted the weakness of the national government established in Mexico City after 1917. At the same time, the adoption of a neutrality policy that appeared to favour Germany in the context of the Great War also undermined the prestige of the Mexican Revolution in the Anglo-American world.[135] In consequence, when the Versailles Conference finally took place in 1919, Mexico was excluded from the talks that the Allied powers held with other Latin American governments in Paris.

Thus, as the 1920s began, the revolutionary regime came to be seen as a threat to American interests in the Western Hemisphere. Excluded from the world order that emerged at Versailles, Mexico's revolutionary government was led by a group of generals and strongmen who were eager to consolidate a new power structure in their country. As leaders of a triumphant revolution, they faced two fundamental challenges: ending Mexico's international isolation and quelling any domestic unrest that might call into question the authority of the new national government. Consequently, Mexico's new rulers resorted to two central tools of statecraft: the use of the military instrument and diplomacy. The first one was necessary to stabilise the country. The second one, to access the foreign credit that the government of the Revolution would need to carry out its programme of national reconstruction in the years ahead. To confer an ideological point of departure for its project, the new regime embraced the rhetoric of revolutionary nationalism, a discursive resource thar had already been used by the Constitutionalist Movement since the days of the civil war.

This account of what happened during those years should not overlook the fact that these strategic aims were achieved in the context of a violent quest for power that involved the main protagonists of the Mexican revolutionary process. Between 1917 and 1929, this struggle fractured the unity of the revolutionary group on several occasions. The 1920 coup against Carranza was followed by a series of uprisings, revolts and coup attempts that repeatedly threatened the nascent unity of the new regime. However, the narrative crafted by the regime in the following decades to explain the sources of its legitimacy largely toned down this violent origin. This consolidated an account that

[134] Lorenzo Meyer, *Su Majestad Británica contra la revolución mexicana, 1900-1950*, Mexico City, El Colegio de México (1991), pp. 101-218
[135] Lorenzo Meyer, "La Revolución Mexicana y el mundo: un acomodo difícil" in *La marca del nacionalismo*, Mexico City, El Colegio de México (2010), pp. 13-46

presented the agreement reached between Mexican civilians and the military in the early days of the century in a particularly favourable light.

In this way, the story of the Mexican Revolution promoted by the regime denied the complexity of the historical experience that the country had undergone since 1910, replacing it with a teleological approach in which the compromise reached between the Mexican civilians and the military led to the best of all possible scenarios. One in which the demand for the establishment of effective civilian political control over the Mexican armed forces was silenced by the argument that the direct subordination of the military to the President of the Republic was sufficient and exempt from any danger. As a result, the need to base civil-military dialogue on a democratic political criterion was omitted for decades.[136]

This consolidated a narrative that was convenient for those at the top of political power: the thesis that in Mexico the existence of a direct relationship between the President and his armed forces was sufficient to safeguard the country's national security. Under the protection of a single hegemonic party and a strong presidential investiture, Mexican society could dispense with any public debate on this issue. At the same time, Mexican diplomacy rapidly found the means to reconcile the rhetoric of «revolutionary nationalism » —which served as ideological foundation of the regime— with the demands of the world order that emerged in the Post-war period.[137] To a large extent, Mexico's participation in the Conference of San Francisco was congruent with the activism that the country had embraced in the context of the Second World War, when President Ávila Camacho sought to create spaces for dialogue between the United States and Latin America.[138] The principles of international law enshrined in the United Nations Charter were enthusiastically embraced by Mexican diplomacy, thus consolidating Mexico's image as a peace-

[136] Thomas Rath, "Camouflaging the State: The Army and the Limits of Hegemony in PRIísta Mexico, 1940-1960" in Paul Gillingham and Benjamin T. Smith (eds), *Dictablanda: Politics, Work, and Culture in Mexico, 1938-1968*, Durham, Duke University Press (2014), pp. 89-107

[137] Lorenzo Meyer, "Conclusiones" in *La marca del nacionalismo*, Mexico City, El Colegio de México (2010), pp. 149-54. As for how the notion of a «Mexican Revolution» became part of a hegemonic story see Rafael Rojas, *La epopeya del sentido: Ensayos sobre el concepto de Revolución en México (1910-1940)*, Mexico City, El Colegio de México (2022), pp. 25-58

[138] Blanca Torres, "La política exterior de México en los años de la Segunda Guerra Mundial" in *De la guerra al mundo bipolar*, Mexico City, El Colegio de México (2010), pp. pp. 56-63. Cf. with Roberta Lajous, *Historia mínima de las relaciones exteriores de México (1821-2000)*, Mexico City, El Colegio de México (2012), pp. 234-241

loving country that favoured the peaceful resolution of international disputes.[139] Therefore, under the conditions of geopolitical stability that prevailed in North America during the Cold War, the country found sufficient room for manoeuvre to reconcile its international activism with the interests of the United States without giving up the impression of pursuing an autonomous foreign policy.[140] However, as a new century approached, the conditions that had favoured Mexican exceptionality gradually faded away, putting an end to the stability of the past.

2.2. The exhaustion of the old strategic narrative and the end of the Mexican «exceptionality»

For decades, the divorce between Mexico's foreign policy and the domestic orientation of its defence and national security policies paid lasting dividends for the regime of the Mexican Revolution. If, as Octavio Paz once suggested, history is the playground of Fortuna, then it can be said that the Mexican rulers of the first half of the last century worked arduously to prevent their country from being left at the mercy of the historical forces unleashed by the outbreak of the great civil war that began in 1910.[141] What is certain, however, is that the myth of a Mexican political exceptionality has proved to be enduring.

This myth rested on several converging narratives: on the one hand, on the exaltation of the social ideology of the Mexican Revolution, committed to the welfare of the working and peasant masses. On the other, in the existence of a strong Executive, which between 1929 and 1946 made possible the transition from a military presidency to a civilian one under the aegis of a single hegemonic party. From this perspective, the concentration of political, administrative and military powers in the figure of the President of the Republic was necessary to maintain national unity, as President Ávila Camacho announced at the time. However, in the second half of the twentieth century, these founding myths of the Mexican political system ceased to correspond to the realities of a country that, from the 1970s onwards, entered an accelerated process of political, economic and social

[139] See for instance Bernardo Sepúlveda Amor, "Política exterior y orden constitucional: Los fundamentos de una política de Estado" in Emilio O. Rabasa (coord.), *Los siete principios básicos de la política exterior de México*, Mexico City, Universdiad Nacional Autónoma de México (2005), pp. 25-52

[140] Sergio Aguayo, "Los rostros del entendimiento entre 1946 y 1960" in *El panteón de los mitos*, Mexico City, El Colegio de México/Grijalbo (1998), pp. 69-122; Lorenzo Meyer, "La guerra fría en el mundo periférico" in Op. cit, pp. 97-112; Hal Brands, "The Latin American Diplomatic Challenge" in Op. cit., pp. 129-63

[141] Octavio Paz, "América: ¿comunidad o coto redondo?" in *Pequeña crónica de grandes días*, Mexico City, Fondo de Cultura Económica (1990), p. 37

transformation. Yet, as late as the mid-1980s, the central criterion for talking about the political experience since 1940 was the definitive «consolidation» of the Mexican state: "Sometimes as a great doer, sometimes as an enormous Golem, sometimes as a great benefactor, and sometimes as an object of criticism, the Mexican state is always presented as a novel process, as a product of social mobilisation, as a point of ruptures and alliances," that ultimately became a leitmotif of Mexico's social and political history. [142]

What happened in Mexico over the last century seems to disprove such an assumption. Although real in many ways, the Mexican «exceptionality» always rested on precarious balances. As the country entered the 1980s, the contradictions created by this exceptionality began to overwhelm the authorities' ability to control the political process: in a sense, the *strategic scripts* created in the first half of the century proved impotent in the face of the new Mexican reality. The turning point began in the 1960s, when the Mexican state waged a bloody counter-insurgency campaign against its armed enemies without accounting for the results to a society apparently oblivious to the repercussions of this period of violence.[143] To a large extent, this relative indifference was possible because the old narratives still worked: in the country that had experienced one of the first social revolutions of the twentieth century, the echoes of the armed insurgencies of the Cold War were met with scepticism and concern.

The use of the military instrument in the new counterinsurgency campaigns of those years was only questioned by those who experienced the direct consequences of repression. Therefore, although the Political Reform of 1977[144] opened the door to a long process of adjustment that eventually allowed for a genuine democratic transition in Mexico, the truth is that this long period of political transformation was never accompanied by a military transition similar to the one that took place in

[142] Rosa María Mirón Lince (coord.), "Presentación" in *Evolución del Estado mexicano*, vol. III, Consolidación, 1940-1983, Mexico City, El Caballito (1986), p. 11

[143] Adela Cedillo and Fernando Herrera, "The Unknown Mexican Dirty War" in Adela Cedillo and Fernando Herrera (eds.), Op. cit., pp. 1-18

[144] Promoted by President José López Portillo (1976-82), the Reform aimed to legalise those political parties from the left that until then remained as clandestine political forces. At the same time, it also sought to promote greater representation of the different political forces in the Congress of the Union. José Woldenberg, *La transición democrática en México*, Mexico City, El Colegio de México (2012), pp. 15-52

Spain after Franco's death.[145] Similarly, what happened in the Southern Cone at that time, where the long night of military dictatorship gave way to new democratic realities in those years, did not seem to offer timely references to guide the agenda of political change in Mexico.[146] It was not without reason that Pablo Picatto concluded four decades later that the country had undoubtedly been a model of political stability for Latin America throughout the last century, "yet not a successful example for transition to democracy and the rule of law."[147]

During the same period, the inclusion of drug trafficking as a priority on the Mexican State's national security agenda was largely driven by the influence of the United States.[148] Although the country's «narcotic history» is little more than a century old, by the 1980s the issue had become a central element of the Mexican public life.[149] However, in the next decade this new national security policy orientation has had profoundly destabilising effects. In the 1990s, the determination to combat drug trafficking coincided with the opening of Mexican markets to the currents of the global economy, thus favouring a constant flow of financial resources, people and licit and illicit goods that has fed the logic of organised crime ever since.[150] Since then, the North American integration process has created favourable conditions for the expansion of organised crime into sectors of the Mexican economy that were previously free from its influence.[151] Over the late 1990s

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[145] Fernando Puell de la Villa, *La transición militar*, Documento de Trabajo No. 6/2012, Madrid, Fundación Transición Española (2012), pp. 51. Cf. with Narcís Serra, "Transition and Military Reform in Spain" in Op. cit., pp. 90-147

[146] See for instance Thomas C. Bruneau and Florina Cristiana Matei, "Asserting civilian control: Argentina," and Florina Cristiana Matei and Marcos Robledo, "Democratic civilian control and military effectiveness: Chile" in Thomas C. Bruneau and Florina Cristiana Matei (eds.), *The Routledge Handbook of Civil-Military Relations*, London, Routledge (2013), pp. 151-58, 283-95

[147] Pablo Picatto, *A History of Infamy, Crime, Truth, and Justice in Mexico*, Oakland, University of California Press (2017), p. 1

[148] Ted Galen Carpenter, *Bad Neighbor Policy: Washington's Futile War on Drugs in Latin America*, New York, Palgrave Macmillan (2003), pp. 11-58; Froylán Enciso, "Los fracasos del chantaje régimen de prohibición de drogas y narcotráfico" in Arturo Alvarado and Monica Serrano (eds.), *Los grandes problemas de México*, vol. xv. Seguridad nacional y seguridad interior, Mexico City, El Colegio de México (2010), pp. 61-104; Carlos A. Pérez Ricart, "U.S. pressure and Mexican anti-drugs efforts from 1940 to 1980: Importing the war on drugs?" in Will G. Pansters, Benjamin T. Smith and Peter Watt (eds.), *Beyond the Drug War in Mexico*, London, Routledge (2018), pp. 33-52

[149] The expression «narcotic history» was coined by Froylán Enciso in *Nuestra historia narcótica: Pasajes para (re)legalizar las drogas en México*, Mexico City, Debate (2015), pp. 19-29. A more recent account of that history is provided by Benjamin T. Smith in *The Dope: The Real History of the Mexican Drug Trade*, New York, W. W. Norton & Co. (2021), pp. 2-17, 92-194

[150] Smith, Ibid., pp. 265-362

[151] Monica Serrano and Paul Kenny, "The Mexican State and Organized Crime: An Unending Story" in Mónica Serrano and Paul Kenny (eds.), *Mexico's Security Failure: Collapse into Criminal Violence*, New York, Routledge (2011), pp. 27-86. Cf. with Carpenter, Ibid., pp. 169-94

and the early years of the new century the country moved towards an increasingly violent and dangerous dystopia: a political transition that was not accompanied by a profound reform of the institutions on which the governance of a democratic state should ideally rest, and an ever-increasing influence of organised crime in the country's political life.[152]

By then, Mexico's domestic political landscape had changed dramatically, but the old narratives were still in place. Under the administration of President Miguel de la Madrid (1982-88) the country joined the General Agreement on Tariffs and Trade, ushering in a new period of economic openness for Mexico.[153] His successor, Carlos Salinas de Gortari (1988-94), took clear steps to make Mexico a North American nation, although the rhetoric of revolutionary nationalism was not entirely abandoned.[154] Although the political legitimacy of his administration was initially challenged by the electoral controversies of 1988, it was not until the end of his six-year term that President Salinas faced a new moment of growing political instability. In January 1994, the Zapatista Army of National Liberation rose up in the state of Chiapas to denounce the marginalisation of indigenous communities in southern Mexico. In March, Luis Donaldo Colosio, the presidential candidate of the Institutional Revolutionary Party, was assassinated in Lomas Taurinas, Tijuana. Six months later, José Francisco Ruiz Massieu, Secretary General of the Party, was assassinated in Mexico City.[155] In December an economic crisis that had immediate global consequences put an end to the country's relative material prosperity of the previous years.

Salinas' successor, President Ernesto Zedillo (1994-2000) understood that it was necessary to move towards a definitive political alternation.[156] Eager to address the public security crisis that their country was experiencing as a result of the economic crisis which ensued the debacle of 1994, Mexican decision makers favoured in those years the progressive military occupation of institutional structures that were originally conceived to serve the purposes of law enforcement

[152] Paul Kenny and Mónica Serrano, "Transition to Dystopia: 1994-2008" in Ibid., pp. 54-86. Cf. with Smith, Op. cit., pp. 363-94
[153] José Francisco Parra, "Renovación moral y cambio estructural: La persistencia de la crisis en la presidencia de Miguel de la Madrid" in Will Fowler (coord.), *Gobernantes Mexicanos*, vol. 11. 1911-2000, Mexico City, Fondo de Cultura Económica (2008), pp. 671-724. Cf. with Enrique Krauze, *La Presidencia Imperial*, Mexico City, Tusquets (2001), pp. 435-454
[154] Rob Aitken, "Carlos Salinas de Gortari" in Fowler, Ibid., pp. 725-84
[155] Ibid., pp. 763-70
[156] Rogelio Hernández Rodríguez, "Ernesto Zedillo: La presidencia contenida" in Ibid., pp. 785-834

and the administration of criminal justice.[157] The definitive break came in December 2000, when Vicente Fox, a candidate who emerged from the ranks of the opposition, became president for the period 2000-2006. Under Fox the old narratives were no longer used, but his administration also failed to implement a profound reform of the security and defence structures of the Mexican state.

Finally, in December 2006, after an eventful political-electoral process, President Felipe Calderón (2006-2012) announced his decision to resort to the military instrument to confront organised crime, considering that its presence in key portions of the national territory was already a threat to the authority of the Mexican State.[158] Since then, the «war on drugs» created a new scenario of armed violence in which the growing prominence of the armed forces has led to the erosion of the balances that previously made possible the dialogue between the civilian and the military in Mexico.[159] In this context, the decision to resort to the military instrument blurred the boundaries that formally separate the national security agenda from the law enforcement realm, allowing the armed forces to carry out tasks that in principle correspond to the police function.[160] As a result, many of the counterinsurgency practices of the previous period were now applied to the fight against organised crime. Before long, Mexican civil society discovered that the assumptions of the old authoritarian civilianism had a precise limit: the behaviour of the troops deployed on the ground soon showed that civilians were incapable of overseeing the conduct of military operations that were only formally under their control.[161]

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[157] Sabina Morales and Carlos A. Pérez Ricart, "Militarización: Una propuesta conceptual basada en el caso mexicano (1995-2012)," Documento de Trabajo No. 2, Berlin, México vía Berlín e. V. (2014), pp. 1-36

[158] See, for instance Felipe Calderón, "XXI Sesión del Consejo Nacional de Seguridad Pública," Mexico City (22 January 2007) in *La voz de los hechos: discursos del Presidente Felipe Calderón Hinojosa*, México, D.F., Fondo de Cultura Económica (2012), p. 43

[159] Erubiel Tirado and Marcos Pablo Moloeznik, "Fuerzas armadas y poder político en México, 2006-2012" in Nauhcatzin T. Bravo and José Guillermo García (coords.), *Balance e impacto de las políticas públicas federales en materia de seguridad en la gestión de Felipe Calderón Hinojosa (2006-2012)*, Guadalajara, Universidad de Guadalajara (2014), pp. 173-214

[160] For an overview of this process consult "2012-2018. El discurso oficial frente a la realidad: La continuidad de la política de seguridad" in *Perpetuar el fallido modelo de seguridad*, Mexico City, Centro PRODH (2018), pp. 19-54

[161] Ibid., pp. 47-78. In fact, much of the discussion on this issue has revolved around the way in which lethal force has been used in a scenario that is not formally that of combat between armed belligerents. In this regard, see Alejandro Madrazo, Rebeca Calzada, and Jorge Javier Romero, "La 'guerra contra las drogas': Análisis de los combates de las fuerzas públicas 2006-2011," Política y gobierno, vol. xxv, no. 2 (2018), pp. 379-402. Cf. with Daniela Rea, Pablo Ferri and Mónica González, *La tropa: Por qué mata un soldado*, Mexico City, Penguin Random House (2019), pp. 75-208

At the same time, the decision to resort to the military instrument also substantially changed the nature of the landscape of violence on the ground: throughout the first two decades of this century, Mexican authorities have had to deal with a form of «high intensity crime» that recreates in its *modus operandi* some of the features that characterise the behaviour of armed actors involved in low-intensity conflicts.[162]

However, a more detailed study of the behaviour of these criminal actors reveals a pattern that finds a starting point in Mexico's long historical experience. Far from acting as warring factions with overt political purposes, the armed groups linked to organised crime have often sought to enter into dialogue with the powers of the state in order to position themselves as intermediaries in the social processes that take place at the local level in Mexico.[163] Yet, this aspiration has also encountered specific limits: fuelled by the money produced by organised crime, the Mexican violence has escaped any lasting political control since long ago.[164]

In light of these considerations, problematising the role of armed force in Mexico is the first step towards understanding how the military instrument has been used during the first decades of this century. To approach this question is also to become aware of the place that the military has historically occupied within the Mexican political system. Finally, to study the way in which the authoritarian regime of the past resolved the military question is to open the door to a broader reflection on the premises that created its strategic vocabulary. To understand the nature of that vocabulary, to trace the origins of its historical trajectory, to become aware of its many silences and omissions, is to lay the foundations that can later be used to understand the reasons for its exhaustion in the first decades of the twenty-first century. It is therefore worth returning to the starting point: the moment when this vocabulary was articulated as part of the nascent strategic culture of the regime that emerged from the Mexican Revolution. From 1929, this regime would rule Mexico for seven decades.

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[162] Paul Rexton Kan, *Cartels at War*, Washington, D.C., Potomac Books (2012), pp. 19-36. Cf. with Stathis N. Kalyvas, "How Civil Wars Help Explain Organized Crime —and How They Do Not," *Journal of Conflict Resolution*, vol. 58, no. 8 (2015), pp. 1517-4

[163] Romain Le Cour Grandmaison, "Los socios turbulentos del Estado: La guerra por la intermediación política en México" in *Istor*, vol. xxii, no. 86 (2021), pp. 49-74

[164] Claudio Lomnitz, "México: El tejido roto," *Nexos* (2021) [online]

3. Content and conclusions

This dissertation is divided into six chapters grouped into three main sections. The first of these sections presents the difficult strategic circumstances that President Venustiano Carranza had to face from 1917 onwards, when the Constitutionalist Movement imposed an armed solution to the great civil war that had been waged in Mexico in the previous years. The second section explores the dilemmas faced by the new revolutionary state throughout the 1920s, when the demand to use the military instrument to fight the enemies of the new regime generated lessons, modes of organisation and strategic narratives that would prove to be enduring.

Finally, the third section looks at what happened between the summer of 1928 and the spring of the following year, a tense period of adjusting that ended with General Calles' call for the creation of a new hegemonic party in Mexico. The study concludes with a prologue that draws on the criteria of applied history to present a set of considerations on the legacies of the strategic culture that the country built up over the last century.

Thus, the first chapter considered in the first section presents an account of the challenges Carranza faced at that time, highlighting the fact that the strategic needs of the period laid the foundations of the nascent Mexican strategic culture. Although formally at the head of a victorious army, the new President rapidly had to face the contradictions generated by the revolutionary experience of the previous years: the «civilist» orientation of the administration headed by Carranza soon clashed with the political ambitions of General Álvaro Obregón, representative of those «armed citizens» who took part in the Mexican revolutionary war since 1910. These were the years in which the dispute between militarism and civilianism determined many of the decisions with which Carranza aimed to tackle the Mexican military question. On the other hand, it was also a period in which Mexico's revolutionary government had to face growing international isolation: breaking out of this early isolation became a central priority of Mexican foreign policy in the period which laid the foundations for its doctrinal orientation in subsequent decades.

The second chapter focuses on the Aguaprieta Rebellion, the coup d'état that in the summer of 1920 brought to power the revolutionary generals who supported the political ambition of Álvaro Obregón. The chapter begins with an account of the crisis that led to the definitive break between

Carranza and Obregón, highlighting the former's efforts in favour of a civilist political alternative for Mexico. At the same time, it also seeks to highlight the origins of a strategic culture that was initially forged in the historical experience of Sonora, a province located in northwestern Mexico with its own political tradition, alien to the realities of the Altiplano (or Mexican Plateau), that vast elevated region in central Mexico which historically was the seat of political power in the country.

In contrast, the second section of this dissertation pays attention to the set of strategic challenges that the new Mexican revolutionary state faced in the third decade of the last century. In doing so, it seeks to trace the origins of the strategic scripts that would later underpin the use of the military instrument in Mexico. A discernible pattern emerges: in a short period of time, the national reconstruction enterprise driven from Mexico City sparked resistance at the local level that could only be overcome by resorting to the use of armed force. As a result, the use of the military instrument in internal security tasks found immediate justification within the framework of the modernisation process promoted by the Mexican Revolution. At the same time, however, it was also clear from the outset that this instrument was not particularly reliable: throughout the 1920s, the Mexican revolutionary authorities faced the challenge of resorting to an army that was used to fulfil strategic purposes of a higher order, but which was at the same time the instrument of caciques and strongmen unwilling to give up the prerogatives they had won under the umbrella of the revolutionary experience in the previous decade. What is certain, however, is that the clash between the central government and the strategies formulated from below by those opposed to its project was resolved through constant negotiation. Once the central authorities recognised the realities on the ground, the mobilisation of armed irregulars, barely tolerated by the army, was accompanied by a form of counterinsurgency warfare that would set an important precedent for the future.

In this way, the third chapter of this dissertation accounts for the way in which the notion of the «citizen soldier» clashed with the political centralisation efforts promoted by the Álvaro Obregón administration between 1920 and 1924. To add depth to the discussion, the chapter considers a precedent that the government of General Porfirio Díaz tried out in the early days of the century, when the call to form the Second Reserve of the National Army was seen as a solution to the Mexican military question, especially in light of the experiences that Mexico had undergone in this area throughout the nineteenth century. By the beginning of the third decade of the last century,

the relative success of that initiative had not been forgotten, but the revolutionary energies unleashed in Mexico after 1910 created an entirely different domestic strategic landscape: for many of the social actors who took part in the armed struggle, the return to order required the invention of mechanisms capable of preserving their autonomy vis-à-vis the authority of Mexico City. In this context, the example of what happened in the state of Veracruz is used to illustrate the way in which different groups of armed citizens sought to make use of the old militia tradition of the nineteenth century to oppose the Chiefs of Military Operations sent by the central government to that state. In this way, the struggle of the *agraristas* led by Governor Adalberto Tejeda is an example of the kind of alliances that at the local level generated strategic responses to the efforts of political centralisation promoted from the country's capital.

In contrast, the fourth chapter presents an account of the crisis that the new national government confronted at the end of 1923, when the project of national reconstruction initiated by Obregón was endangered by a new armed uprising led by a group of revolutionary generals who sought to challenge the Caudillo on his own terms. The episode is important because it showed that the vulnerabilities of the new State were still significant and, above all, because it demonstrated that the expedient use of the military instrument could still have decisive strategic effects on the battlefield. By defeating the rebel generals who backed Adolfo de la Huerta's rebellion in the spring of 1924, the National Army secured for the new regime the conquest of the present, thus laying the foundations for its long-term consolidation. As Robert Carriedo has rightly pointed out, this experience marked a turning point in the career of Joaquín Amaro, the general to whom the leaders of the new state entrusted the task of transforming the National Army into a professional military force, capable of serving as an instrument of national power in the immediate future.

The fifth chapter focuses on another crisis that at some point endangered the future of the Mexican Revolution's regime: the national emergency experienced between 1926 and 1929. Inspired by the religious traditions of many local communities in the western provinces of Mexico, the political project of a new armed insurgency emerged by then as an alternative to the rationalist order imposed from the country's capital. Aggrieved by the modernisation process imposed by the Mexican Revolution, those who rose up in arms to take part in the War of the Cristeros against the Mexican state initially simply wanted to reclaim the right to practise the Catholic faith in which their elders had been raised. However, this aspiration —a return to a traditional way of life enlightened

by the principles of the Catholic faith— was soon accompanied by the development of a movement that took on many of the characteristics of a modern insurgency. The episode is particularly relevant because it tested the skills of the new National Army that General Amaro was building at the time, forcing him to resort to a behaviour well known among the armies of the great powers: the practice of counterinsurgency. It is no exaggeration to say that this experience constitutes one of the most important legacies of a strategic culture that has since tended to give the Mexican military instrument the mission of confronting internal enemies with the aim of destroying them.

The third section of this dissertation functions as a conclusion. After considering the effects of the Cristero War on the political dynamics of the new Mexican revolutionary state, the sixth chapter presents the efforts made by General Plutarco Elías Calles to find a lasting solution to the political crisis that followed the assassination of General Álvaro Obregón in the summer of 1928. It was in this context that the foundations of a new political hegemony were finally laid thanks to the call for the creation of a new political party that would bring together all the supporters of the Mexican Revolution. The solution, which according to Octavio Paz had the flavour of that historical moment, would have lasting political effects: from that moment on, Mexico advanced along the path that in the middle of the century paved the way for the «authoritarian civilianism» on which the formula for the Mexican political exceptionality finally rested.

The account presented by this dissertation finally closes with an epilogue in which the work of the poet Robert Frost is used to consider the nature of the strategic paths along which Mexico travelled in the first decades of the last century. Far from postulating that these outcomes were inevitable, the reflective exercise presented at the close of this work postulates that the Mexican historical experience was open to conditions of possibility that could have led to alternative outcomes. In this way, the prologue works as a critique of the confabulation that shaped the narrative on the Mexican military question throughout the last century, but at the same time, it also seeks to point out the weight of this narrative on the present. In so doing, the exercise undertaken by this dissertation seeks to trace the origins of a set of historical persistencies that are of interest for the study of the strategic behaviour of the Mexican state over its long historical duration. As a result, the dissertation presents the Mexican experience as a useful case study for understanding the way in which emerges the strategic culture that guides the grand-strategic behaviours of a given society.

Chapter 1. President Carranza and the quest for a civilianist alternative for Mexico, 1917-1920

"Wars have repeatedly changed the course of human history, opening up pathways into the future and closing down others," wrote Margaret MacMillan in a recent work on the subject.[165] "Major wars," wrote Alan Knight almost four decades earlier, "have been the midwives of change in the twentieth century. In Mexico's case, the war was civil, not international, but, by virtue of its totality, it had comparable, far-reaching but unplanned consequences."[166] With this succinct assessment, the British historian summarised the long-term impact of Mexico's last great upheaval in the nation's historical conscience. More recently, Knight himself has pointed out that the magnitude of the violence generated by the Mexican Revolution (1910-1920) allows it to be considered, in effect, as a true «total war», similar in lethality to the Great War of 1914.[167] In this context, what happened after 1917 is particularly important, since it was then when the military victory of the Constitutionalist Movement put an end to the armed struggle previously waged by the different political factions that took part in the Mexican civil war.

The purpose of this chapter is to provide an account of the circumstances that prevailed in Mexico at the end of the great civil war that broke out in 1910, paying special attention to the strategic challenges that President Venustiano Carranza had to address between 1917 and 1920, the period in which a triumphant revolution took over the governmental tasks that ultimately laid the foundations of the modern State in Mexico. Originally, Carranza was only the leader of one of the many revolutionary factions that took part in the civil war. However, the military victories won from 1914 onwards by the forces that the future president led as First Chief of the Constitutionalist Army quickly placed him at the head of a triumphant politico-military movement, in need of taking the first steps to rebuild a country devastated by the violence caused during the days of struggle. To understand the scope of those provisions, it is necessary to pay attention to the strategic challenges that the revolutionary Mexico of those years faced both domestically and in its external or international situation.

[165] Margaret MacMillan, *War: How Conflict Shaped Us*, New York, Random House (2020), p. xiii
[166] Alan Knight, *The Mexican Revolution*, vol. 2, Counter-revolution and Reconstruction, Lincoln, University of Nebraska Press (1990), p. 518
[167] Alan Knight, "Guerra Total: México y Europa, 1914," *Historia Mexicana*, vol. lxiv, no. 4 (2015), pp. 1583-1666

On the domestic front, the chapter seeks to focus on the tensions generated by Carranza's military policy in the context of an accelerated process of political transformation that ultimately had to be completed by the presidential succession of 1920. From the very beginning, the efforts of the new revolutionary government faced a formidable challenge: to demobilise a victorious army led by generals eager to exert an ever-expanding influence over Mexican public life. Therefore, in the debates held by the constituent deputies meeting in Querétaro from December 1916 onwards, the dispute between «civilianism» and «militarism» emerged as a concern that anticipated the complexity of the military question in Mexico. And while this was happening, the political star of General Álvaro Obregón, the commander who made possible the triumph of the Constitutionalist cause on the battlefields of the revolution, was already emerging as a threat to the civilianist regime that Carranza aspired to build in those years.

On the other hand, the chapter also pays attention to the behaviour of President Carranza's administration during the final phase of the European war and the period in which the Paris Conference of 1919 was convened. Because Mexican oil played a central role in supplying the British fleet with energy during the war, the constitutional order established in Mexico after February 1917 was seen as a direct threat to the entente's war effort. At the same time, Mexico's neutrality in the European conflict was interpreted as a favourable attitude towards Germany, a country that offered President Carranza's administration the possibility of exercising a formal geopolitical counterbalance to the pressures coming from the United States. In any event, in the period between the spring of 1917 and the summer of 1919, the Mexican revolutionary government had to seriously consider the possibility of a general war between Mexico and the United States. For this reason, when the Paris Conference took place, Mexico was not invited to take part in the debates that defined the architecture of the post-war world order. Similarly, the deference of the delegates at Versailles to the Monroe Doctrine was seen in Mexico as a tacit recognition of American imperialism. Consequently, in the following months the Mexican revolutionary government formulated a doctrine of its own: the Carranza Doctrine, an alternative to the Wilsonian principles that was projected by the Mexican authorities with particular insistence in Latin America.

In this way, the chapter aims to interpret what happened after 1917 in strategic terms, paying special attention to the domestic and international challenges that President Venustiano Carranza had to face in those years, pointing out that the responses to those challenges were to have political

effects that ultimately laid the foundations of the strategic culture that would gradually shape the behaviour of revolutionary Mexico in those years. Thus, the outcome of the disagreement between Obregón and Carranza was destined to cast a long shadow over the evolution of the new Mexican political system, anticipating many of the dilemmas that the military question would generate throughout the last century in that country.

After a grand civil war: the road to a new political order for Mexico

According to David Armitage, the term «civil war» has always had a variable content.[168] Thus, for the ancients, civil war was the expression of the failure of communal life: the product of discord that fractures a political community into armed factions, civil war was seen as the prelude to anarchy. In modernity, however, another tradition has made civil war the prelude to revolution.[169] Since the end of the eighteenth century, notes Octavio Paz in a 1967 essay that in a sense anticipated Armitage's thesis, the word revolution has taken on new meanings: anointed by the light of ideas, the term has become "philosophy in action, critique turned into an act, lucid violence."[170] From then on, concludes the Mexican poet, "the archetype of the event is not what it was but what it will be."[171] It is not surprising then that the protagonists of the civil war that shattered Mexico after 1910 referred to that experience by using the term «revolution» to grant meaning to what they experienced in those years: according to Rafael Rojas, the conviction that they had participated in a great revolution (a Revolution with capital letters) took shape at an early date.[172] As a result, the expression «Mexican Revolution» not only accounted for the scope of the civil war waged in those years; rather, it became a powerful political metaphor that thereafter gave meaning to the country's march into the future.

Yet the fact that the supporters of the Mexican Revolution were also the protagonists of a major civil war should not be forgotten, especially if one wishes to consider the strategic effects of that

[168] David Armitage, *Civil Wars: A History in Ideas*, New Haven, Yale University Press (2017), pp. 3-30
[169] Ibid., pp. 24-26. Notably, Armitage considers Koselleck's position on this subject with special care, but only in order to refute it. In this regard, see Reinhart Koselleck, "Historical Criteria of the Modern Concept of Revolution" in *Future Past*, New York, Columbia University Press (2004), pp. 43-57
[170] Octavio Paz, "Revuelta, revolución, rebelión" in *Las palabras y los días*, Mexico City, Fondo de Cultura Económica (2008), p. 144. Originally published in *Corriente alterna*, Mexico City, Siglo XXI (1967), p. 147-51
[171] Ibid., p. 146
[172] Rafael Rojas, "Formas de decir *revolución*" in *La epopeya del sentido*, Mexico City, El Colegio de México (2022), pp. 25-58

experience. According to Will Fowler, every civil war has its own grammar, which to a large extent defines its scope.[173] In this way, Mexico's experience since 1910 corresponds to the criteria usually used to define this kind of conflict, especially because the civil war that the country experienced in the early years of the last century was a response to the political fractures caused by the modernisation process promoted from Mexico City at the end of the nineteenth century.[174] It is in this context that Alan Knight's statement concerning total war is illuminating: although Mexico was not an advanced industrial society, capable of mobilising in a centralised way the firepower that the armies of the great powers brought to the battlefields of Europe in 1914, the notion of «total war» becomes meaningful when one considers the magnitude of the losses caused by the armed struggle in the country in the period between 1910 and 1920.[175] Following Robert McCaa's work in this realm, Knight notes that the first of the great costs incurred by the revolution was human: during the period the country suffered a demographic deficit of 2.1 million people.[176] In effect, according to McCaa's estimations, no less than 1.4 million persons lost their lives in Mexico due to the revolutionary violence experienced during that period.[177] As Knight himself has pointed out, these are losses that are not far from those experienced by the European powers at that time: even if Mexican losses are reduced to a total of 400 thousand men, "this figure is equivalent to 2.7% of the population, that is, 68% greater than the British figure, 170% greater than the average of all belligerents in the First World War, and almost equal to the very high German figure: 3.0% ." [178] At

[173] Will Fowler, "A New Framework for the Study of Civil War" in *The Grammar of Civil War: A Mexican Case Study, 1857-61*, Lincoln, University of Nebraska Press (2022), pp. 1-42

[174] Namely, points out Fowler, "a war taking place primarily within one nation-state, pitting at least two politically defined sides against each other, one of which is the government at the beginning of the hostilities, and resulting in major military clashes with high death tolls on the part of all those involved, impacting upon the civilian population." Ibid., pp. 13-14

[175] Indeed, the ability to mobilise in a sustained way all the resources of a society in favour of the war effort is one of the central features of a total war. Concordantly, Azar Gat has pointed out that the world wars were truly total "in the senses that they combined high mobilization rates with far enhanced GNP extraction levels that where mostly channelled to the industrial mass production of military hardware." Azar Gat, "Unbound and Bound Prometheus: Machine Age War" in *War in Human Civilization*, Oxford, Oxford University Press (2006), p. 527. Professor Hew Strachan seems to agree with such a criterion, especially when he points out that the new military technologies of the period demanded an uninterrupted flow of material resources as part of the war effort. Hew Strachan, "From Cabinent War to Total War: The Perspectives of Military Doctrine, 1861.1918" in Roger Chickering and Stig Förster, *Great War, Total War*, Cambridge, Cambridge University Press (1999), pp. 13-28

[176] Knight, Op. cit., pp. 1601-605

[177] Robert McCaa, "Missing Millions: The Demographic Cost of the Mexican Revolution," *Mexican Studies/Estudios Mexicanos*, vol. 19, no. 2 (2003), pp. 367-400

[178] Tor reach this numbers Knight considered the difference between the number of men and women that died during the period in Mexico. Using the data provided by McCaa, the British historian estimates that in Mexico the mortality caused by the revolutionary war represented almost two thirds of the demographic

any rate, concludes McCaa, the mortality costs of the Revolution were massive, "so great, in fact, as to be characterized as 'implausible' by demographers." As a result, he concludes, the Mexican Revolution can be considered as "the greatest demographic catastrophe of the twentieth century" in the Americas.[179]

No less significant were the political consequences of the Mexican civil war, the first of which was the disappearance of the political order built in Mexico as of 1876. Like Bismarck, General Porfirio Díaz was a *white revolutionary* who placed the construction of the Mexican state to rest in the virtues of his own personal political genius.[180] At the time, his regime seemed to express a successful synthesis of the great national aspirations of nineteenth-century Mexico, a country that from its inception as an independent nation lived under the shadows of anarchy and civil war.[181] However, by 1908 it was evident that the viability of the Porfirian regime was conditioned by its greater or lesser capacity to offer an alternative for political renewal capable of transcending the legacy of the old statesman.[182] The presidential succession of 1910 thus became a turning point for Mexican political life. Faced with the closure of alternatives, Francisco I. Madero's call to enforce free suffrage opened the doors to an armed insurrection that in a short time forced Díaz to negotiate a political solution to avoid widespread bloodshed. The efforts of both statesmen were in vain: from 1911 the country entered a cycle of political instability that finally led to the military coup of February 9, 1913 in which Madero himself was overthrown by General Victoriano Huerta, a professional military commander raised in the values of the previous regime.[183]

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deficit: a total of 1, 400, 000 people, including 900 thousand men and 500 thousand women. Op. cit. Knight, pp. 1602, 1605

[179] McCaa, Op. cit., p. 397

[180] "Statesmen who build lastingly transform the personal act of creation into institutions that can be maintained by an average standard of performance," wrote Kissinger in order to ponder Bismarck's legacy. The assertion is useful in order to asses Díaz's legacy as well. Henry A. Kissinger, "The White Revolutionary: Reflections on Bismarck," *Daedalus*, vol. 97, no. 3 (1968), p. 890

[181] Edmundo O'Gorman, "Luz y sombra de la dictadura" in *México: El trauma de su historia*, Mexico City, Consejo Nacional para la Cultura y las Artes (1999), pp. 83-88; Luis González, "El liberalismo triunfante" in Op. cit. *Historia general de México*, pp. 897-1016, and Paul Garner, "Epílogo y conclusiones" in Op. cit., *Porfirio Díaz…*, pp. 315-26

[182] Alan Knight, *The Mexican Revolution*, vol. 1. Porfirians, Liberals and Peasants, Lincoln, University of Nebraska Press (1990), pp. 1-77; Paul Garner, "El precio del orden y el progreso" in Ibid., pp. 279-314. Cf. with Friedrich Katz, *De Díaz a Madero*, Mexico City, Era (2004), pp. 7-71

[183] Alicia Hernández Chávez, "Origen y ocaso del ejército porfiriano," *Historia Mexicana*, vol. 39, no. 1, (1989), p. 289

It was from then on that the governor of the State of Coahuila, Venustiano Carranza, decided to pull the strings of history to demand the restoration of the constitutional order broken by the coup plotters.[184] On February 19 of that same year, the XXII Legislature of the State of Coahuila repudiated General Victoriano Huerta "in his capacity as Head of the Executive Power of the Republic" and granted the Executive of the State extraordinary powers in order to arm forces as a way "to contribute to the preservation of the constitutional order in the Republic."[185] Although in 1902, following the militia tradition in which his father had been trained, Carranza enlisted in the Second Reserve of the National Army, the fact is that from the very beginning he emphasised his status as a civilian leader at the head of a revolutionary movement aimed at restoring the republican legality that was shattered by the coup d'état of February 1913. Shortly after, on March 26 of that same year, a group of officers issued the Plan of Guadalupe, a document that recognised "citizen Venustiano Carranza, Governor of the State of Coahuila, as First Chief of the Army to be called 'Constitutionalist'."[186]

At first, few believed that the Constitutionalist Movement led by Carranza would overcome the many difficulties it experienced in its early days. At the moment of leading the uprising against the coup plotters, the governor of Coahuila had no more than 700 men under his command.[187] In contrast, the new government at Mexico City had thousands of federal soldiers distributed throughout the national territory. As a result, in March 1913 Carranza's situation seemed highly untenable from a military point of view. However, a year later the strategic situation of the rebels was very different: in the summer of 1914 the movement led by Carranza already had several army corps that fought a series of decisive battles in which the federal troops were completely destroyed. However, the dissolution of the Federal Army, agreed in Teoloyucan on August 13, 1914, did not mean the end of the armed struggle. As Lorenzo Meyer has pointed out, the collapse of the federal government headed by General Huerta in the summer of that year did not give rise to a new regime,

[184] Héctor Aguilar Camín and Lorenzo Meyer, *A la sombra de la Revolución Mexicana*, Mexico City, Cal y Arena (2000), p. 51
[185] "Manifiesto a la Nación," Hacienda de Guadalupe, Coahuila (26 March 1913) reproduced in Venustiano Carranza, *Plan de Guadalupe: Decretos y Acuerdos 1913-1917*, Mexico City, Instituto Nacional de Estudios Históricos de las Revoluciones de México (2013), p. 19
[186] "Manifiesto a la Nación," Hacienda de Guadalupe, Coahuila (26 March 1913) reproduced in Venustiano Carranza, *Plan de Guadalupe: Decretos y Acuerdos 1913-1917*, Mexico City, Instituto Nacional de Estudios Históricos de las Revoluciones de México (2013), p. 19
[187] Aguilar Camín and Meyer, Op. cit., p. 51

"but to the intensification of the struggle, to the point that between 1914 and 1916 the Mexican State practically ceased to exist."[188]

With no other enemy to defeat, from 1914 onwards the Mexican revolutionaries waged a war amongst themselves for the purpose of conquering political power at the national level. Thus began the "war of the winners": a conflict that, according to Alan Knight, decided the future of the Mexican Revolution.[189] Cornered by the forces of the National Revolutionary Convention, a group that championed a radical alternative to the programme of the Constitutionalist Movement, Carranza decided to leave Mexico City in November 1914 to establish his government in the Port of Veracruz, where the First Chief formed his war cabinet. As a result, around 1915 the alternative of a triumphant popular revolution led by the armies of Francisco Villa and Emiliano Zapata was presented as one of the possible outcomes of the conflict. For a moment it appeared that this would be the case. However, the strategic inexperience of the Convention, which was only notionally obeyed by the distant troops of the Northern Division and the Liberation Army of the South, eventually allowed the Constitutionalist Army to prevail on the battlefield. At the beginning of 1916 it was evident that Carranza had managed to re-establish a national government on the basis of the military victories previously obtained against his adversaries.[190]

In 1917, the Mexican political landscape was particularly complex: once in power, the leadership of the Constitutionalist Movement fractured around the challenge of establishing a lasting political order in Mexico. The existence of a revolutionary army standing on a war footing was then revealed as a central problem for the construction of the future. Therefore, as Luis Medina Peña has pointed out, of all the difficulties that clouded the horizon of the victors at the time, the military question proved to be "the most pressing and delicate to overcome."[191] If we give credit to the sources of the time, in 1916 the Constitutionalist Army had 200 thousand men, among which were around 50 thousand chiefs and officers, an unusual number that reflects the rise of many of them in the

[188] Lorenzo Meyer, "Su Majestad Británica contra la Revolución Mexicana," *Nexos* (1987) [online]. The same reflections are explored by Meyer in dept at "Constituciones y conspiraciones" in *Su Majestad Británica contra la Revolución Mexicana, 1900-1950*, Mexico City, El Colegio de México (1991), p. 219

[189] Alan Knight, "The war of the winners" in *The Mexican Revolution*, vol. 2. Counter-revolution and Reconstruction, Lincoln, University of Nebraska Press (1990), pp. 263-320

[190] Ibid., pp. 321-28

[191] Luis Medina Peña, "La domesticación del guerrero" in *Hacia el nuevo Estado*, Mexico City, Fondo de Cultura Económica (2000), p. 20

context of the armed struggle.[192] At the beginning of 1917, Charles C. Cumberland points out, this army consisted of 150 thousand men, a size "equivalent to that of the United States on the eve of its entry into the First World War."[193]

President Carranza, the lessons of history and the need for order

Like other statesmen confronted with enormously complex political challenges, Venustiano Carranza believed in the possibility of resorting to the study of history to find referents of political behaviour worthy of being emulated in the present. His model was not that of the distinguished men of antiquity, as Machiavelli would have counselled, but Benito Juárez, the president who from 1858 worked incessantly in favour of the consolidation of an effective republican regime in Mexico. Thus, the decisions that Carranza made from 1913 onward in his capacity as Head of the Executive Power and First Chief of the Constitutionalist Army always found an immediate referent in what happened in Mexico in the mid-nineteenth century, when the country was dragged into civil war after the promulgation of the liberal Constitution of 1857. In effect, the War of Reform or Three Years' War (1857-1861), which Will Fowler has recently described as one of the bloodiest wars of the Mexican nineteenth century, was one of the central referents of Carranza's political behaviour during the years in which he led the efforts of the Constitutionalist Movement.[194] For this reason, when Carranza, besieged by the armies of the Convention, decided to establish his government in the Port of Veracruz at the end of 1914, he was actually recreating the decision taken by Juárez in the spring of 1858, when the Liberal Government abandoned Mexico City in order to avoid an encirclement by the armies of his Conservative enemies.[195]

Triumphant on the military front, Carranza's pre-constitutional government was able from 1916 onwards to adopt general provisions for the establishment of a new political order in Mexico. At the end of that year, the First Chief convened a Constituent Congress in the city of Querétaro that brought together many of the country's most advanced political and intellectual figures, including

[192] Ibid., p. 38. Cf. with Mario Ramírez Rancaño, "Una discusión sobre el tamaño del ejército mexicano: 1876-1930," *Estudios de Historia Moderna y Contemporánea de México*, no. 32 (2006), p. 57
[193] Charles C. Cumberland, *La Revolución Mexicana: Los años constitucionalistas*, Mexico City, Fondo de Cultura Económica (1975), p. 198
[194] Will Fowler, *La Guerra de Tres Años 1857-1861*, Mexico City, Crítica (2020), pp. 12-26
[195] Ibid., pp. 154-60

several generals from the Constitutionalist Army —although he certainly excluded all those who had previously fought or collaborated with the defeated factions of the Revolution. Yet, the purpose of the assembly was to grant Mexico a new constitutional framework, in agreement with the demands of a revolutionary movement that, according to Daniel Cosío Villegas, incorporated into its agenda "three major goals: political freedom, agrarian reform, and workers organisation."[196] The result was the Constitution promulgated on February 5, 1917, which established a new legal system that embraced the principles of political liberalism but that, at the same time, "accepted as a fundamental basis the role of the State in economic and social affairs." [197] A new Constitution "imbued with a sense of belligerent nationalism" that was expressed forcefully in the provisions of its articles 27 and 123: the first one, referred to the dominion of the nation over the land and natural resources existing in its territory; the second one, to the relationship between capital and labour, now under the supervision of the State authority.[198]

Supporter of a «civilianist» option capable of putting an end to the disorders experienced in the country after several years of armed struggle, President Venustiano Carranza (1917-1920) also believed that the electoral process that the country would have to undergo in September 1920 would allow the definitive consolidation of the new constitutional order established in Querétaro three years earlier. Previously, when Carranza exercised the broadest powers as First Chief of the Constitutionalist Army, he was confronted with the arduous task of creating favourable conditions for the consolidation of State institutions in the context of the war of the winners that was waged after the fall of Victoriano Huerta's government. In consequence, since 1915 Carranza's military policy as Head of the Executive Power (1913-1917) aimed to re-establish the authority of the Ministry of War and Navy over the broad group of armed contingents that formed part of the Constitutionalist Army. [199] To preserve the new army was a strategic priority linked to the need of pacifying a country fractured by years of armed violence. At the same time, reducing the size of that army and advancing its professionalisation was an equally urgent political enterprise. Once the constitutional order was re-established, the new administration had more resources to carry out

[196] Daniel Cosío Villegas, "La crisis de México" in *Extremos de América*, Mexico City, Tezontle (1949), p. 31
[197] Cumberland, Op. cit., p. 325
[198] Jorge Carpizo, *La Constitución de 1917*, Mexico City, Universidad Nacional Autónoma de México (1980), pp. 93-121
[199] Javier Garciadiego, "La política militar del presidente carranza" in Alicia Hernández and Manuel Miño (coords.), *Cincuenta Años de Historia en México*, vol. 2, Mexico City, El Colegio de México (1991), pp. 439-66

that task, which at the time began with the dissolution of the large army corps created in the previous years. [200] And yet, in spite of these efforts the truth is that, as many renowned historians have noted, under the Carranza administration Mexico never experienced a single day of authentic peace: although the adversaries of the new regime were unable to challenge it militarily in effective terms, bandits, insurgents and rebels encouraged by the most various political and material demands still exerted a real influence over specific portions of the national territory, thus slowing the troop demobilisation process aimed by the federal authorities.[201]

In light of these considerations, it is natural to think that military policy was a priority for Carranza. However, the possibility of re-establishing a permanent army of a professional nature also clashed with the political influence that the revolutionary generals had gained during the days of struggle. At any rate, Carranza considered that the authority of the presidential institution would be sufficient to contain the political ambitions of the Mexican military ahead of an electoral process that would take place in conditions far removed from those of full democratic normality. [202] Thus, when General Álvaro Obregón resigned from the Secretary of War in May 1917 to retire to private life, it was no secret to anyone that such a decision was the first step to running for the presidency of the Republic in 1920. The ambition of the Sonoran general was soon seconded by Pablo González, the former commander of the Eastern Army Corps, who initially believed he had Carranza's favour.[203] Against the ambition of both generals, a critique of Mexican militarism was rapidly raised by the supporters of Carranza, who embraced a tradition forged in the historical experience of a country that did not have more than one hundred years of independent life at the time.

The quest for a «civilianist» alternative: from Querétaro to the 1920 electoral process

For the generation to which President Carranza belonged, the preoccupation with militarism was directly related to the political instability that Mexico experienced during the first

[200] Medina Peña, Op. cit., pp. 36-38
[201] Cumberland, Op. cit., p. 361. Cf. with Álvaro Matute, "Del Ejército Constitucionalista al Ejército Nacional," *Estudios de Historia Moderna y Contemporánea de México*, vol. 6, no. 6 (1977), pp. 164-65, and Javier Garciadiego, "La política militar del presidente Carranza" in Hernández Chávez and Miño Grijalva, Op. cit., pp. 439 and 463-67
[202] Cumberland, Ibid., p. 337
[203] Garciadiego, Op. cit., p. 101

decades of the nineteenth century. From the beginning, this concern was part of the agenda that shaped Mexican liberal thought, especially thanks to the work of figures such as José María Luis Mora (1794-1850) and Mariano Otero (1817-1850), two central references of that thought in the early days of the Republic.[204] In this context, the figure of the military *caudillo* became a constant source of concern for the proponents of Mexican liberalism: at first, revolts (*asonadas*) and military uprisings (*pronunciamientos*) were seen as the origin of the numerous political disorders that Mexico experienced at the beginning of its life as an independent nation.[205] At the same time, the growing political influence of the generals who made possible the definitive victory of the Republic against the Empire and its foreign supporters in 1867 was also seen as a danger to the liberal principles that it represented in the next decades.[206] In contrast, the idea of the «citizen soldier» found in the institution of the National Guard a central referent, for in such institution the Mexican liberals of the half century recognized "the virtue of being a counterweight to a strong central army and militarism." [207] Starting in 1900, the call to form a Second Army Reserve integrating civilians into it as volunteer officers was one of the last efforts to balance the balance of civil-military relations in Mexico before the outbreak of the civil war. [208] Therefore, it is not surprising that the concern for militarism had a prominent place in the political program of Francisco I. Madero, subsequently embraced by all the revolutionaries who, from 1910 on, sought to destroy the political order established in the previous decades under the administration of General Porfirio Díaz. [209]

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[204] Alan Knight, "El liberalismo mexicano desde la Reforma hasta la Revolución (una interpretación)," *Historia Mexicana*, vol. 35, no. 1 (1985), pp. 59-91. Cf. with Josefina Zoraida Vázquez, "Un viejo tema: el federalismo y el centralismo," *Historia Mexicana*, vol. 42, no. 3 (1993), pp. 621-31

[205] Will Fowler, "'I Pronounce Thus I Exist': Redefining the *Pronunciamiento* in Independent Mexico, 1821-1876" in Will Fowler (ed.), *Forceful Negotiations*, Lincoln, University of Nebraska Press (2010), pp. 246-66

[206] As for the place of militarism in the political thought of Porfirian Mexico see Hernández Chávez, Op. cit., pp. 266-68, David A. Brading, "Francisco Bulnes y la verdad acerca de México en el siglo XIX," *Historia Mexicana*, vol. 45, no. 3 (1996), pp. 621-51, and María Luna Argudín, "Cinco formas de representar el pasado, a propósito de las polémicas en torno de Juárez (1905-1906)," *Historia Mexicana*, vol. 57, no. 3 (2008), pp. 775-861

[207] Luis Medina Peña, "La Guardia Nacional, matriz del sistema político" in *Invención del Sistema Político Mexicano: Forma de Gobierno y Gobernabilidad en Mexico en el Siglo XIX*, Mexico City, Fondo de Cultura Económica (2007), pp. 425-31. Cf. with Hernández Chávez, Ibid., p. 267

[208] Marco Enrique Sánchez López, "Una propuesta reyista para la juventud del país: La Segunda Reserva del Ejército Nacional en el Distrito Federal, 1900-1902," *Legajos*, no. 4 (2014), pp. 33-62. Cf. with Hernández Chávez, Ibid., pp. 283-87

[209] Francisco I. Madero, "El militarismo en México" in *La sucesión presidencial en 1910*, Parras, Taller de Serafín Alvarado (1909), pp. 26-92. Cf. with María José Navajas, "El voto y el fusil: una interpretación del discurso maderista en la coyuntura política de 1909-1910," *Historia Mexicana*, vol. 57, no. 4 (2008), pp. 1107-153

Therefore, it is difficult to maintain that the emphasis that Carranza gave to civilianism in the context of the 1920 electoral process was dictated exclusively by the political needs of the moment.[210] In any case, it should be remembered that the central justification of the Constitutional Movement rested on the condemnation of the coup led by General Victoriano Huerta against the administration of Francisco I. Madero (1911-1913) in February of 1913. For this reason, after assuming his position as Head of the Executive Power, Carranza formed a war cabinet in which personalities linked to the civilianist movement such as Luis Cabrera and Félix F. Palavicini had a prominent role. The latter assumed thereafter a prominent position as ideologist and propagandist of the Constitutionalist Movement.[211] In fact, it was thanks to constitutionalist propaganda conceived by Palavicini that around 1914 militarism was invoked again to discredit the cause of the Revolutionary Convention and to point out that Francisco Villa, at the head of the Northern Division, was actually a military *caudillo* in the making.[212]

However, it was in the context of the great sessions of the Constituent Congress, held in Querétaro from December 1916, where the concern for militarism deserved repeated attention from the deputies gathered there to draft the new constitutional text. [213] Many of them seemed to share the position of General Francisco J. Múgica (elected to represent the district of Zamora, Michoacán), who in one of the first working sessions of the new assembly pointed out that before the revolution "in Mexico there had been no army " since, in reality," there was only militarism."[214] Thus, the language of the constituent deputies quickly sought to display a revolutionary rhetoric capable of reflecting the zeal of their cause: in the ordinary session held on December 21, 1916 to debate about the place of press freedom in the new Constitutional text, deputy Francisco Ramírez Villarreal (Colima) pointed out that the revolution should not grant privileges "neither for clericalism, nor for

[210] The opposite view is held by Álvaro Matute in Op. cit. "Del Ejército Constitucionalista al Ejército Nacional," pp. 165-66

[211] Eduardo Clavé, *Nuestro hombre en Querétaro: Una biografía política de Félix Fulgencio Palavicini*, Mexico City, Juan Pablos (2019), pp. 47-56

[212] This position was developed by Palavicini in a series of press articles latter compiled in *Un Nuevo Congreso Constituyente*, Veracruz, Imprenta de la Secretaría de Instrucción Pública y Bellas Artes (1915), pp. 5-9, 221-28

[213] According to the records of the three volumes of the *Diario de los Debates del Congreso Constituyente*, the expression "militarism" is invoked 53 times by the constituent deputies.

[214] This exhortation took place in the context of the debates held in relation to the contents of Article 5 of the new Constitution. 25th Ordinary Session (December 28, 1916), *Diario de los Debates del Congreso Constituyente, 1916-1917*, vol. i, Mexico City, Instituto Nacional de Estudios Históricos de las Revoluciones de México (2016), p. 282

militarism, nor for the aristocracy." [215] A couple of days later, deputy Carlos L. Gracidas (Veracruz) pointed out that if the Mexican workers affiliated with the Casa del Obrero Mundial, then the most influential labour organisation in Mexico, had given their support to the Constitutionalist Movement, it was "to crush the common enemy, the militarist of profession, the capitalist and clericalism." [216]

However, for many of those gathered in Querétaro, clarifying the status of the «armed citizens» who took part in the sessions of the Constituent Congress was also a truly important question: on the one hand, it was undeniable that the presence of the military element was controversial in itself; on the other, it could not be said that their representatives were an expression of the militaristic threat of the past, since they were not professional soldiers. [217] Ultimately, the concern had a real basis: of the 218 deputies who made up the Constituent Congress, no less than 66 were or had been officers of the Constitutionalist Army. Twelve of them were to have an outstanding participation in the debates that preceded the writing of key articles of the new constitutional text.[218] For this reason, said deputy Alfonso Cravioto (Hidalgo) at the end of December 1916, it was vital to fight against militarism, "but without confusing militarism with our Army." [219]

For his part, Hilario Medina (Guanajuato) warned the assembly that assuming that military power is the only support for a strong government is not only inaccurate, but dangerous. "Social institutions," he concluded, "have no more support, when they are organic, than the citizens themselves." Yet, this opinion was not shared by everyone present. In fact, many of those deputies who were already part of the current that sympathized with General Obregón's political aspirations held the opposite view. Thus, when weighing the merit of the civilians who had responded to the

[215] 19th Ordinary Session (December 21, 1916) concerning an opinion of Article 7 of the Constitution, in position against C. Ramírez Villarreal in *Diario de los Debates del Congreso Constituyente, 1916-1917*, vol. ii, Mexico City, Instituto Nacional de Estudios Históricos de las Revoluciones de México (2016), p. 77

[216] 24th Ordinary Session (December 27, 1916), discussion on Article 5 of the Constitution in Ibid., p. 240

[217] Juan de Dios Bojórquez (Sonora) expressed this position in the debates held in the 27th Ordinary Session of January 27, 1917 in *Diario de los Debates del Congreso Constituyente*, 1916-1917, vol. iii, Mexico City, Instituto Nacional de Estudios Históricos de las Revoluciones de México (2016), pp. 508-509

[218] The account differs according the source consulted. The numbers cited here are presented in "La participación militar en la redacción de la Carta Magna de 1917" in Salvador Cienfuegos et al., *Centenario de la Constitución de 1917: La participación militar en la consolidación institucional*, Mexico City, Secretaría de la Defensa Nacional (2017), pp. 121-44.

[219] 25th Ordinary Session (28 December 1916), debate on Constitutional Article 5 in Op. cit. *Diario de los debates…*, vol. i, p. 255

call of the Constituent Congress, Juan de Dios Bojórquez (Sonora) pointed out that he did not consider them specially qualified to hold positions of popular election. At this moment, he concluded "it is a real national need to count above all on the military, because the military are the ones who have made the revolution."[220] However, Bojórquez also recognized that there were notable exceptions: one of them was in the figure of Adolfo de la Huerta, a civilian from Sonora who in his eyes always rise to the occasion during the days of struggle. [221] Already in November 1916 another constituent deputy had praised a Sonoran in similar terms, pointing out that General Plutarco Elías Calles was more a civilian than many of those present, being one of those «armed citizens» who had been in line of fire from the beginning, always willing to defend the cause of the revolution. [222] Few then suspected that in the spring of 1920 the two mentioned Sonorans would play a central role in the outcome of the political crisis that would allow a definitive return to order in Mexico through armed means.

A Mexican alternative for the world order and the political ambitions of Álvaro Obregón

In the first days of 1919, the silent political confrontation that began with Obregón's resignation from the War Ministry two years earlier gained new momentum. By virtue of the dominant political effervescence, on January 15, 1919, President Carranza issued a manifesto in which he asked all presidential hopefuls to postpone the launch of their campaigns.[223] In that document, the president pointed out that more serious considerations, such as the threat of a foreign armed intervention sponsored by the enemies of the revolution were clouding Mexico's political horizon. "The situation in Mexico is extraordinarily similar to that of the liberal government of Juarez in 1860," noted Carranza, eager to underline this historical parallelism. [224] When the War

[220] Bojorquéz's intervention took place on January 27, 1917, in the context of the debates related to the impediment of being in active service in the army when taking part in an electoral process. Op. cit. *Diario de los Debates…*, vol. iii, p. 508

[221] In effect, the then deputy questioned the assembly in those terms, saying that it was still waiting to know which were "the effective services rendered by civilians" to the revolution in Loc. cit.

[222] The position was expressed by Froilán C. Manjarrez (Puebla). His intervention took place within in the context of Electoral College Session held on December 2, 1916 in order validate the work of the First Credentials Review Commission. Op. cit. *Diario de los debates…*, vol. i, p. 444

[223] The document was published in the pages of *El Demócrata*, one of the newspapers close to the Constitutionalist Movement on January 15. A day later it was published in the Official Gazette of the Federation. Venustiano Carranza, "Manifiesto del Ciudadano Presidente de la República a la Nación," *Diario Oficial de la Federación* (16 January 1919), pp. 1-5

[224] "El Presidente de la República dirige un manifiesto al pueblo," *El Demócrata*, vol. v, no. 696 (16 January 1919), p. 4

of Reform came to an end in January 1861, Mexico did not achieve a lasting peace: in a short time, Spain, France and Great Britain created a coalition to demand that the Mexican government comply with its international obligations, which had been suspended since the beginning of the civil war. A year later the country had to face the intervention of France in a war scenario that lasted until 1867. In this way, the possibility of a new armed intervention by the great powers was framed by Carranza in the light of such referents. For this reason, the president appealed to unity within the ranks of the Constitutionalist Liberal Party, the political institute founded in 1916 with the hope of bringing together all the supporters of the Constitutionalist Movement.[225]

At the same time, Carranza had in mind the impact of the external strategic landscape on the aspirations of the revolutionary order that his government wanted to consolidate internally. Attentive to what was going to be decided in Paris at that time, the president pointed out:

> The difficult international situation in which the entire world finds itself has not yet reached a definitive solution, and just as all the countries that took part in the world contest have not seen fit to lay down their arms, or even abandon some of the measures of prudence to which the war forced them, in the same way the Constitutionalist Government, which during this contest, with the general approval of the Mexican people, considered it convenient to assume a neutral attitude, must still continue with sufficient cohesion to persevere in that attitude of nationalism, until the serious and transcendental problems that are currently being discussed among the belligerent nations have had a definite solution.[226]

Carranza's concern was not unjustified. Under the new constitutional framework established in Querétaro as of 1917, the dominance granted to the nation over subsoil resources was interpreted as a threat to the energy supply of Great Britain and the United States. As a result, the possibility of a military intervention aimed at gaining control of the Mexican oil fields was never ruled out in

[225] Cumberland, Op. cit., p. 327

[226] "La difícil situación internacional en que se encuentra el mundo entero, no ha llegado aún a una solución definitiva, y así como todos los países que tomaron parte en la contienda mundial no han creído conveniente deponer las armas, ni aun siquiera abandonar algunas de las medidas de prudencia a que la guerra los obligó, así también el Gobierno Constitucionalista, que durante esta contienda, con la aprobación general del pueblo mexicano, consideró conveniente asumir una actitud neutral, debe continuar todavía con la suficiente cohesión para perseverar en esa actitud de nacionalismo, hasta tanto que no hayan tenido una solución final los graves y trascendentales problemas que en los momentos actuales se discuten entre las naciones beligerantes." Op. cit., *El Demócrata*, p. 4

those years. [227] On the other hand, the neutrality that the Mexican government observed since the outbreak of the Great War was considered as the expression of a tacit sympathy towards the cause of the Central Powers. [228]

Carranza's response to the post-war strategic landscape

In reality, Carranza's call was not without merit: his position was the result of an exercise in argumentation that aimed to respond to the changing circumstances of an external strategic landscape that appeared to be especially dangerous for Mexico. At any rate, Mexicans could remember that starting in 1914, the administration of President Wilson had authorized two military actions that at the time were considered the prelude to a general war between Mexico and the United States: first, by ordering the Atlantic Fleet to occupy the port of Veracruz on April 21, 1914 in order to prevent the government of General Huerta from receiving war materiel from Europe, thus making effective the arms embargo that the US government had imposed on the Mexican belligerents in February of the same year; later, by authorizing the Punitive Expedition that on March 14, 1916, entered Mexican territory under the command of General John J. Pershing to pursue the insurgents led by Francisco Villa. [229] Both actions, which apparently favoured the cause of the Constitutionalist Movement, were vigorously condemned by Carranza, who considered them as flagrant violations of Mexico's sovereignty.

On the other hand, on January 16, 1917, the Minister of Foreign Affairs of the German Empire, Arthur Zimmerman, sent an encrypted telegram to his representative in Mexico, Count Heinrich von Eckardt, in which he was ordered to propose to the Mexican president to arrange a military alliance against the United States in which Japan, an old and trusted interlocutor of the Mexican government, also was considered. Intercepted and decrypted by British intelligence, the telegram not only revealed Germany's hostile intent towards the United States; it also showed with overwhelming clarity that Mexico's position in the face of the European conflict was not insignificant: by virtue of its geographical location, the country could become a vulnerable flank for

[227] "Constituciones y conspiraciones" in Meyer, Op. cit., *Su Majestad Británica contra…*, pp. 231-32
[228] Friedrich Katz, "Carranza y la Primera Guerra Mundial" in *La guerra secreta en México*, Mexico City, Ediciones Era (1998), pp. 575-77. Cf. with Ávila, Op. cit., pp. 319-21
[229] "Estados Unidos, Gran Bretaña y Huerta," and "Los Estados Unidos y México, 1914-1917" in Ibid. Katz, pp. 226-31 and 345-59

the grand strategy of the Allies. Previously, Mexican oil had been considered essential for British war efforts, especially after the start of the unrestricted submarine campaign that Germany launched from February 1915. [230] Aware that the geopolitical contradictions generated by the Great War militated in favour of the Mexican national interest, in those years Carranza worked with unusual diplomatic dexterity to transform Mexico's initial vulnerability into a position of relative strength in the face of American and British demands. [231] However, at the beginning of 1919 new challenges could be seen on the horizon of international politics.

By then Carranza was also aware that Mexico was not viewed with sympathy by the powers that had risen to victory on the battlefields of the First World War. If during the war Mexican neutrality had been considered suspicious, in the postwar period the revolutionary character of the Mexican regime was no less controversial: accused of being friends of the Kaiser during the war days, the Mexican leaders were now accused of sympathizing with the cause of the Bolshevik revolution in Russia. [232] The comparison was not at all unfortunate for, as Friedrich Katz has pointed out, the revolutionary process experienced by both societies finds remarkable similarities. Ultimately, he points out, "both the Bolsheviks and the victorious Mexican revolutionaries believed that the state should have ultimate control over natural resources and play a major role in the economic life of their countries."[233]

However, unlike Russia, Mexico was not a great power.[234] The decisions taken by Carranza since 1917 had significant diplomatic costs for the country at the end of the First World War, the impacts of which lasted well into the 1920s. The determination not to abandon Mexican neutrality once the United States entered the European conflict, announced in December 1917, was not well received by the members of the Entente, who viewed with suspicion the dialogue that Mexico established

[230] "Constituciones y conspiraciones" in Meyer, Op. cit., *Su Majestad Británica…*, pp. 229-30; "Alemania y las facciones revolucionarias" in Katz, Ibid., pp. 396-401
[231] "Carranza y la Primera Guerra Mundial" in Katz, Ibid., pp. 574-92
[232] Roberta Lajous, *Historia mínima de las relaciones exteriores de México, 1821-2000*, Mexico City, El Colegio de México (2012), p. 166
[233] Friedrich Katz, "Violence and Terror in the Russian and Mexican Revolutions" in Greg Grandin and Gilbert M. Joseph (eds.), *A Century of Revolution*, Durham, Duke University Press (2010), p. 51
[234] In the previous pages of the work by Katz quoted here the opposite is stated: "Unlike Mexico, Russia was a world power, and its revolution took place in the context of the enormous ravages and weakening of the state that resulted from Russia's involvement in the First World War. Nothing similar took place in Mexico." This last assertion is especially controversial, considering the magnitude of the destruction that Mexico experienced in the context of its own civil war. Ibid., p. 46

with Germany during the final phase of the war.[235] At the same time, as of February 1918, the fiscal needs of the new revolutionary State led the Mexican president to enforce the provisions of the 1917 Constitution in relation to oil, thus affecting in a significant manner the interests of the foreign companies that controlled the Mexican oil fields since the beginning of the twentieth century.[236] Finally, it should not be forgotten that since 1914 the Mexican government had suspended the service of the foreign debt, creating among Mexican bondholders the impression that only the use of force could force Mexico to comply with its international obligations. In April 1918, the protest of the governments of the United States, France and Great Britain in relation to the provisions adopted by the revolutionary authorities against the oil companies operating in Mexico led many to think that the possibility of an armed intervention was imminent.[237]

Thus, when the Paris Conference took place in January 1919, Mexico was not initially considered among the group of neutral states invited to take part in the peace negotiations. As a result, the representative of the Mexican revolutionary government, Alberto J. Pani, was only belatedly accredited by the French authorities, and in consequence he never established formal diplomatic dialogue with the delegates meeting at Versailles.[238] According to a renowned Mexican scholar, the exclusion of his country was "a measure of marginalisation only comparable to that decided for the defeated powers in the First World War, perhaps because the Mexican Revolution repeatedly showed signs of a shadow belligerence in favour of Germany." [239]

No less relevant was the fact that the representatives of the great powers debated "the Mexican question" in terms similar to those that guided their conduct in relation to the colonial possessions of the losers: placing Mexico under the tutelage of Great Britain or The United States using the new mandate system envisioned by the nascent League of Nations for other territories in Africa and Asia.[240] In deference to the Monroe Doctrine, the British representative in Washington, Colville

[235] Agustín Sánchez Andrés, "La Doctrina Carranza y el inicio del proceso de normalización de las relaciones exteriores del México posrevolucionario, 1915-1919," *Boletín del Archivo General de la Nación*, vol. 9, no. 2 (2019), p. 203
[236] Loc. cit.
[237] Lajous, Op. cit., p. 167
[238] Sánchez Andrés, Op. cit., p. 209
[239] Fabián Herrera León, "México y la Sociedad de Naciones: sobre su exclusión e ingreso (1919-1931)," *Historia Mexicana*, p. 1651
[240] Ibid., p. 1655-56

Barclay, pointed out in April 1919, the Mexican question should ideally remain in the hands of the United States and not in those of the European powers. [241]

Precisely, this deference to the postulates of the Monroe Doctrine was unacceptable for the revolutionary government of Mexico, which saw in such postulates one of the most tangible expressions of American imperialism.[242] In the first months of 1917, the international activism of Mexico was shaped in order to challenge the criteria of the Monroe Doctrine in a concrete way: by inviting neutral powers to lead a mediation effort among the European belligerents, Carranza placed special emphasis on the participation of other Latin American states.[243] Later, when he delivered the annual address to the nation in the Congress of the Union on September 1, 1918, the president declared:

> The guiding ideas of international politics are few, clear and simple. They are reduced to proclaiming: that all countries are equal; that they must mutually and scrupulously respect their institutions, laws and sovereignty; that no country should intervene in any way and for no reason in the internal affairs of another. That all must submit strictly and without exception to the universal principle of non-intervention; that no individual should claim a better situation than that of the citizens of the country where he is going to settle, nor make his status as a foreigner a title of protection and privilege. Nationals and foreigners must be equal before the sovereignty of the country in which they are; and finally, that the laws should be uniform and equal as far as possible, without establishing distinctions on the grounds of nationality, except in relation to the exercise of sovereignty.[244]

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[241] Colville Barclay to the Secretary of State for Foreign Affairs, "Situation in Mexico," Washington, D. C., April 16, 1919, ANRU, FO, 539/2/2 quoted by Herrera León in Op. cit., p. 1655

[242] On this issue see Juan Pablo Scarfi, "Denaturalizing the Monroe Doctrine: The rise of Latin American legal anti-imperialism in the face of the modern US and hemispheric redefinition of the Monroe Doctrine," *Journal of International Law*, no. 33 (2020), pp. 541-55

[243] Sánchez Andrés, Op. cit., p. 218

[244] "Las ideas directrices de la política internacional son pocas, claras y sencillas. Se reducen a proclamar: que todos los países son iguales; deben respetar mutua y escrupulosamente sus instituciones, sus leyes y su soberanía; que ningún país debe intervenir en ninguna forma y por ningún motivo en los asuntos interiores de otro. Todos deben someterse estrictamente y sin excepciones al principio universal de no intervención; que ningún individuo debe pretender una situación mejor que la de los ciudadanos del país a donde va a establecerse, ni hacer de su calidad de extranjero un título de protección y de privilegio. Nacionales y extranjeros deben ser iguales ante la soberanía del país en que se encuentran; y finalmente, que las legislaciones deben ser uniformes e iguales en lo posible, sin establecer distinciones por causa de nacionalidad, excepto en lo referente al ejercicio de la soberanía." Speech reproduced in "El Sr. Presidente de la República, pone de manifiesto, ante la representación nacional, su gestión administrativa," *Excélsior*, vol. v, no. 534 (2 September 1918), pp. 1, 5

Over time, these postulates would be considered by the Mexican authorities as the expression of a specific doctrinal position: the Carranza Doctrine, the first effort of the governments of the Revolution to establish the position of Mexico in relation to the serious questions related to the construction of the world order of the first postwar period. Like Wilson, the Mexican president also criticized the alliance system that had prevailed until then, pointing out that the old diplomacy had been unable to avert the outbreak of the European war in 1914.[245]

In articulating the set of positions that supported the new doctrine, the president resorted to legal precedents recognised in the Latin American historical experience: domestic ones, by invoking the thought of President Juárez regarding the sovereignty of nations, the non-intervention principle and the legal equality of the States; external ones, by appealing to the Calvo Doctrine, especially with regard to the criterion that foreigners should not have greater rights than the nationals of a specific country and, finally, by also appealing to the Drago Doctrine, referring to the refusal to accept that the non-payment of a country's external debt was reason enough to justify an armed intervention by its foreign creditors [246] Finally, Carranza also rejected the postulates of the Roosevelt Corollary to the Monroe Doctrine, pointing out that the call for non-intervention in the affairs of the nations of the Americas should be extended as a whole to the relationships between all members of the international community, regardless of their internal political circumstances.[247]

In this way, the Mexican President sought to project an articulated and consistent foreign policy position to the world, no less advanced in its political scope than that formulated by President Wilson. However, for British observers of the time, the Mexican revolutionary experience was far from offering useful references to face the serious challenges of the postwar period. From their point of view, this experience had been nothing more than an endless process of political degradation. [248] For several years, the position of the American government was not different from that of their British counterpart: in the revolutionary world of those years, the administration of President Wilson found few coincidences with a regime that sought to give the principles of liberalism a decidedly nationalist interpretation, for as Lloyd C. Gardener has pointed out, the Mexican Revolution "represented the first serious challenge to the international order established

[245] Sanchez Andrés, Op, cit., p. 203
[246] Ibid., pp. 203-10
[247] Ibid., p. 209
[248] Lorenzo Meyer, Op. cit., p. 220

by the industrial nations after the middle of the nineteenth century."[249] For this reason, the claim that the Mexican government could establish a firmer control over the natural resources of its national territory, enshrined in Article 27 of the new Constitution issued in Querétaro, was considered as an attack against the principle of respect for private property.

Certainly, Carranza took all these questions into account in January 1919, when he asked the candidates to run for the presidency of the Republic to suspend their campaigns. In light of the growing international isolation that Mexico had experienced since 1918, the president's concern regarding the possibility of an intervention from abroad was not entirely mistaken. However, the truth is that the issue was not a cause of special concern among his opponents. Rather, for many of them the publication of the manifesto was seen as a direct interference by the president in the electoral process.[250] Thus, the predominance of domestic security concerns over those related to the international arena seemed to anticipate in those months a pattern that would become persistent in the public life of Mexico throughout the twentieth century.

"Still within the period of the force": the path towards the presidential succession of 1920

"I do not believe that any civilian candidacy will emerge for the next period, much less that by emerging it could succeed," General Benjamin Hill, commander of the Mexico City garrison, declared in April 1919. His words were made known in the pages of *El Universal*, a newspaper recognised since its foundation for its closeness to the Carranza regime.[251] "We must not be under any illusions; we are still within the period of force," Hill concluded, also pointing out that his electoral sympathies were placed on the figure of his uncle, General Álvaro Obregón.[252] In fact, General Hill's position only echoed a conviction that since 1915 became prevalent around the military circles of the triumphant revolution: that the victories obtained on the battlefield were the only justification needed to justify the conquest of political power.[253] The fact is not fortuitous: since

[249] Lloyd C. Gardener, "Woodrow Wilson and the Mexican Revolution" in Arthur S. Link (ed.), *Woodrow Wilson and a Revolutionary World, 1913-19121*, Chapel Hill, The University of North Carolina Press (1982), p. 12
[250] Cumberland, Op. cit., p. 363
[251] Founded with the tacit agreement of Carranza, *El Universal* counted with Luis Cabrera, Félix F. Palavicini and Pascual Ortiz Rubio among its majority shareholders. Leonardo Martínez, "Hacia una reconsideración de la historia del periodismo en México," *Revista Mexicana de Ciencias Políticas y Sociales*, vol. 36, no. 139 (1990), p. 48
[252] *El Universal* (30 April 1919) quoted by Matute in Op. cit. *La carrera del Caudillo*, p. 22
[253] Medina Peña, Op. cit., p. 27

1914 the armed citizens who took up arms to respond to Carranza's call found in Álvaro Obregón a military figure endowed with the virtues of a great military commander.

In the context of the Fiftieth Anniversary of the Revolution, when the passions of the civil war had already given way to a canonical vision of the past, General Aarón Saénz pointed out that Álvaro Obregón had always been a "leader of men, undefeated and intuitively brilliant in his military campaigns." And like any great commander, when Obregón found himself in the need to destroy, he always "destroyed to make the cause of constitutionalism triumph." [254] Obregón himself, of course, was the first to offer a similar approach to his figure, when in May 1917 he released *Ocho mil kilómetros de campaña* (Eight Thousand Kilometres of Campaign), a book in which he presented himself as the only undefeated general of the Mexican Revolution.[255] Converted into a tool at the service of propaganda, Obregón's military prestige thus laid the foundations for a political ambition that would only be satisfied with the conquest of the country´s presidency.

Therefore, it is not surprising that the manifesto released by Carranza on January 15, 1919 was viewed with scepticism by an important part of the national public opinion. For this reason, the call to postpone the electoral campaigns had a limited effect among the contenders, among whom only Pablo González seemed to echo Carranza's words.[256] Thus, against the best wishes of the president, the electoral turmoil continued uninterrupted in the following months. Finally, on the first day of July, Obregón announced his intention to openly contest for the Presidency of the Republic.[257] In the manifesto that he addressed to the nation, published a few days later, the general pointed out that the historical figure of the First Chief would be in danger if his legacy was limited to offering what other revolutionary experiences had already offered to Mexico in the past: "Not letting the country free itself from its liberators." [258]

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[254] Aarón Sáenz, "Álvaro Obregón," *Historia Mexicana*, vol. 10, no. 2 (1960), p. 311

[255] Álvaro Obregón, *Ocho mil kilómetros en campaña*, Mexico City, Librería de la Viuda de Ch. Bouret (1917), pp. 745. An assessment of this work is presented by Ignacio Almada Bay in "Cien años de la publicación de *Ocho Mil Kilómetros en Campaña*," Boletín del Fideicomiso Archivos Plutarco Elías Calles y Fernando Torreblanca, no. 86 (2017), pp. 36. Regarding its place within the canonical approaches to the military history of the Mexican Revolution consult Salmerón, Op. cit., pp. 1308-11

[256] Matute, Op. cit., *La carrera del Caudillo*, pp. 29-30

[257] The announcement was made known by Obregón to his supporters in Nogales, Sonora, on June 1, 1920. In the following days, the words of the Sonoran general would be reproduced in the main newspapers of the country, including *El Demócrata*. Cumberland, Op. cit., p. 363

[258] Álvaro Obregón, "El Gral. Obregón acepta su candidatura y se dirige a la nación en un Manifiesto," *El Demócrata* (6 June 1919), p. 2

In the months that followed, the country moved once again into increasingly uncertain political waters. On November 26, 1919, at the initiative of a group close to the president, the National Democratic Party nominated Ignacio Bonillas as its candidate. [259] A man of undoubted political merits, since February 1917 Bonillas had assumed the complex task of representing the government of Mexico before the administration of President Wilson. In that capacity, on many occasions the future candidate for the presidency had to face a complex diplomatic scenario, defined by the condition of vulnerability and relative isolation in which the civil war had left his country.[260] A Sonoran from the first hour, Bonillas held public positions in the local administration of his state in the same years in which Obregón took the first steps of a journey that would finally lead him to take part in the great game of national politics during the first months of 1920. [261] However, for a large number of Mexicans, Bonillas was an unknown name, in addition to the fact that he was not one of the «armed citizens» who in the previous years risked their lives on the front line fighting the enemies of the revolution.[262] Apparently, only his loyalty to Carranza led him to assume a responsibility for which he did not feel a special vocation.

While Bonillas hesitated to assume his new task, on January 13, 1920, the Progressive Party nominated General Pablo González as its candidate, opening a new front in Carranza's confrontation with the generals of the revolution.[263] Four days later *El Demócrata* published the convention of the National Democratic Party in which the candidacy of Bonillas would be endorsed. Significantly, the intention of the leaders of the new party was to hold a national convention with the participation of all political forces akin to the «civilist» cause, including other formations such as the National Solidarity League, the National Antimilitarist Party, and the National Civilist Party.[264] By itself, the gathering looked promising. However, to gauge the potential of the civilist machinery it was necessary to resort to a piece that at that time was outside the national territory: the figure of its candidate, who would not enter Mexico until March 19, 1920.[265]

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[259] Matute, Op. cit., *La carrera del Caudillo*, p. 82
[260] Ibid., pp. 56-62
[261] Almada Bay, Op. cit., p. 757
[262] That was, of course, the position of Obregón's supporters. Matute, Op. cit., p. 60
[263] Cumberland, Op. cit., pp. 364-65
[264] "Los partidos que sostienen la candidatura del Ing. I. Bonillas celebrarán una gran convención," *El Demócrata*, vol. 6, no. 1061 (17 January 1920), p. 1
[265] Matute, Op. cit., *La Carrera del Caudillo*, p. 87

Carranza thus faced a dilemma: if he yielded to the pressure of the political group headed by Obregón, the possibility of consolidating a model of governance inspired by the principles of civilism would be cancelled. At the same time, it was also clear that relying on the results of the campaign led by Bonillas was illusory: in reality, the only hope of victory for civilism lay in the possibility of the central government openly intervening in the course of a political process that only in a superficial way complied with the formalities of a democratic exercise. Perhaps for this reason, in the first days of February Carranza sought to bring together a large group of governors in Mexico City with the intention of obtaining from them a political commitment that, according to the president, was necessary to grant guarantees to the electoral process. From February 6 to 9, seventeen governors actually met in the capital to deliberate on the problems posed by the 1920 presidential succession.[266]

In the manifesto that they released to the nation's public opinion two days later, the governors close to Carranza pointed out that the possibility of an armed uprising was one of the dangers that the government would have to face in the context of the presidential succession, especially if any of the generals who aspired to the presidency was not favoured with the popular vote.[267] However, some of those summoned considered from the beginning that the president's call was an initiative aimed at favouring the candidacy of Bonillas and, consequently, they refused to attend the meeting. Among the dissidents was a small group of governors who openly or veiled supporters of Obregón: Pascual Ortiz Rubio (Michoacán), Carlos Green (Tabasco) and Enrique Estrada (Zacatecas). Adolfo de la Huerta, governor of Sonora since September 1, 1919, led the three aforementioned governors, openly censuring Carranza's claims in the press of his state.[268] Soon these men, led by General Plutarco Elías Calles, would set the wheels of history in motion.

Conclusion

Today, Mexicans concerned about political developments in their country often refer to the term «militarisation» to suggest that the growing incursion of the armed forces into law

[266] Cumberland, Op. cit., p. 365
[267] Loc. cit.
[268] Ibid., pp. 365-68

enforcement is the most tangible expression of a phenomenon that is dangerous to the country's public life.[269] In contrast, few seem to pay attention to the notion of «militarism», which Alfred Vagts has famously defined as "every system of thinking and value and every complex of feelings which rank military institutions and ways above the ways of civilian life, carrying military mentality and modes of acting and decisions into the civilian sphere."[270] This was not the case in the early years of the last century, when the issue was of concern to the constituent deputies who met in Querétaro at the end of 1916. At the time, one of them approached the phenomenon in the following terms: militarism, he said, "is a condition of young societies, whereby an army turned into a military caste takes by storm the public powers and fills with its personalities all the organic functions of a society."[271] Over time, Mexican society moved away almost completely from such an approach, convinced that this danger had little to do with the realities of a country that would later be afflicted by other problems no less complex. In keeping with the dominant way of interpreting the historical experience of the regime that emerged at the end of the Mexican Revolution, as late as 1989 a prominent scholar could still write that until then Mexico had been, basically, "a non-militarist country."[272]

For the generation to which President Carranza belonged, however, the Mexican military question was part of a problem that surfaced with insistence as soon as Mexico acceded to the status of an independent country in the early days of the nineteenth century. In the context of the great civil war waged from 1910 onwards, the use of the military instrument had proved its politico-strategic utility in serving the goals of the Constitutionalist Movement, especially since the war of the winners was decided thanks to the intervention of the armed citizens who supported Carranza's project. However, once the triumph was achieved, the First Chief of the Constitutionalist Army was

[269] In 1994, a group of Mexican scholars first considered the possibility that their country might move in the coming years towards a process of militarisation of law enforcement. On this issue, see Samuel González, Ernesto López Portillo and José Arturo Yánez, "Diagnóstico de la Seguridad Pública en México" in *Seguridad Pública en México*, Mexico City, Universidad Nacional Autónoma de México (1994), pp. 84-85. For an understanding of the most recent trends favouring the militarisation of law enforcement in Mexico consult Sabina Morales and Carlos A. Pérez Ricart, "Militarización: Una propuesta conceptual basada en el caso mexicano (1995-2012)," Documento de Trabajo No. 2, Berlin, México vía Berlín e. V. (2014), pp. 1-36

[270] Alfred Vagts, *A History of Militarism: Civilian and Military*, New York, The Free Press (1959), p. 17

[271] Estas palabras fueron pronunciadas por Hilario Medina (Guanajuato) en el marco de los debates de la 37° Sesión Ordinaria del Congreso Constituyente, celebrada el 10 de enero de 1917. *Diario de los Debates del Congreso Constituyente, 1916-1917*, vol. iii, Mexico City, Instituto Nacional de Estudios Históricos de las Revoluciones de México (2016), p. 599

[272] Alicia Hernández Chávez, "Origen y ocaso del ejército porfiriano," *Historia Mexicana*, vol. 39, no. 1, Homenaje a Silvio Zavala II (1989), p. 257

faced with the difficult task of building a revolutionary state by resorting to a coercive instrument which was not fully in his power. As a result, the professionalisation of the army became a central priority of an administration which, at the same time, had to cope with the growing ambition of the generals who had brought to it the military successes of the previous decade.

On the other hand, Carranza could not be oblivious to what happened on the international scene, where a changing strategic landscape left Mexico at the mercy of the victors of the First World War. In this context, the Mexican revolutionary government's response to these external challenges laid the foundations for a strategic behaviour that would prove recurrent: by appealing to a particular interpretation of the principles underlying the world order forged at the Paris Conference, the revolutionary Mexico of those years laid the foundations for a foreign policy doctrine that provided a clear reference point for the country's behaviour throughout the last century. Conceived in defensive terms, the Carranza Doctrine thus became the starting point for behaviour that addressed the strategic circumstances of a country that had granted itself a constitutional framework that quickly came into collision with the interests of the great powers, especially with regard to the petroleum question.

The two dimensions of the behaviour of the new Mexican revolutionary State led by Carranza never found a definitive solution under his administration. From 1919 onwards, the Mexican president had to face the pressures created by the political group headed by General Álvaro Obregón, the man whom the armed citizens who took part in the Mexican civil war regarded as Carranza's natural successor. The outcome of this political dispute would give way to a political crisis that to a large extent defined the path that would be followed by the revolutionary state established in Mexico at the end of the great civil war of 1910.

Chapter 2. The hour of Sonora: from Agua Prieta to Mexico City, 1920

When referring to the events that were to determine the end of one of his stories, Jorge Luis Borges quotes page 242 of the *History of the European War* by Captain B. H. Liddell Hart, evoking a British offensive that was postponed by a couple of days for unsuspected reasons at the end of July 1916.[273] Central to Borges' approach is the thesis that the protagonist of every story advances along paths that fork or diverge, giving rise to multiple futures in which today's friends are tomorrow's enemies. "I thought of a labyrinth of labyrinths, of one sinuous spreading labyrinth that would encompass the past and the future and in some way involve the stars."[274] Consequently, the decisions involving each of the actors of his story take place in time, not in space, since in all of Borges' fictions "each time a man is confronted with several alternatives, he chooses one and eliminates the others."[275] As he approaches the outcome of each decision, Borges does not rule out the potential for other alternative outcomes; ultimately, this web of times "which approached one another, forked, broke off, or were unaware of one another for centuries, embraces *all* possibilities of time."[276]

In this way, in Borges' fantastic universe, nothing prevents the potential of each of the paths from being fulfilled simultaneously, opening the doors to the fulfilment of multiple futures. However, the protagonists of every story often advance without understanding the true nature of the trails they have travelled.[277] Something similar happens in the realm of historical events, where men and societies alike are confronted with immediate problems without fully discerning the complex relationship of cause and effect that leads to the present. In Mexico, the dispute between Venustiano Carranza and Álvaro Obregón led to an outcome that is taken for granted today: a

[273] Borges is writing here about the assault on the Serre-Montauban line, originally scheduled for July 24, 1916. Although the author never clarifies it, this action was part of the first phase of the Battle of the Somme. Jorge Luis Borges, "The Garden of Forking Paths" in Donald A. Yates and James E. Irby (eds.), *Labyrinths: Selected Stores and Other Writings*, New York, New Directions (1964), p. 19. The work of Captain Liddell Hart cited by the Argentine writer is *The Real War, 1914-1918*, London, Faber & Faber (1930), pp. 539. In it, the military action of which Borges speaks appears in p. 252. As for the reasons why this source is never explicitly recognised by Borges see Ethan Weed, "A Labyrinth of Symbols: Exploring 'The Garden of Forking Paths'," *Variaciones Borges*, no. 18 (2004), pp. 161-89, esp. 165-66, 170-71. For an early review of the aesthetic merits of this story, consult Jack Himelblau, "El arte de Jorge Luis Borges visto en su 'El jardín de senderos que se bifurcan'," *Revista Hispánica Moderna*, vol. 32, no. 1/2 (1966), pp. 37-42

[274] Ibid., p. 475

[275] Ibid., p. 478

[276] Ibid., p. 479

[277] Op. cit. Weed, p. 175

military coup in the summer of 1920 closed certain strategic paths and opened others, providing a particular direction to the process that ultimately determined the nature of the strategic culture which the country embraced throughout the last century.

The purpose of this chapter is to recount that process, especially since the Agua Prieta Rebellion ended the threshold time in which Mexico could have advanced along a different path from the one it eventually followed throughout the twentieth century. To this end, the chapter begins with an account of the political crisis that erupted in the state of Sonora in early 1919, when Governor Adolfo de la Huerta confronted the Mexico City government to assert his state's rights against the central government. This controversy is the starting point for a closer look at events in the "Republic of Sonora," the state in which Álvaro Obregón's politico-military career was originally forged. Therefore, the account of what happened in Sonora is the prelude to considering the way in which Carranza sought to respond to this crisis, which to a large extent must be placed within the context of the political electoral process that formally should have allowed for a peaceful renewal of the presidency of the Republic in the summer of 1920.

In Mexico, the outcome of the Agua Prieta rebellion is considered today as the starting point of a process that made possible the consolidation of an authoritarian regime defined by exceptional features within the Latin American political landscape. However, for those who took part in that politico-military adventure in the summer of 1920, Agua Prieta was, above all, a solution to their more immediate ambitions; one of the many paths that opened up for Mexico in the early days of the last century. Over time, the founding moment that Mexicans would associate with the establishment of the new revolutionary State would be 1917, the year Carranza convened the Constituent Congress of Querétaro, and not 1920, the year in which the Mexican Revolution's most brilliant general staged a military coup against Carranza that never received that name in the first place.

In the light of these considerations, the possibility of situating the significance of Agua Prieta in the framework of the long historical duration of the Mexican political experience is useful when estimating the origin of the strategic behaviour that governed the country throughout the last century. This approach gives a prominent place to the political culture that endured in Sonora in the decades preceding the outbreak of the Mexican Revolution. To a large extent, the account of

what happened in Sonora in those years allows us to understand the path followed by the political actors who finally laid the foundations of the strategic culture that was later promoted from Mexico City by the heirs of the Aguaprieta Rebellion.

Carranza's last great bet and the encounter with the waters of history

Like many other revolutionaries from the State of Sonora, Adolfo de la Huerta distinguished himself during the days of struggle by working tirelessly in favour of the Constitutionalist cause.[278] After having carried out important diplomatic missions abroad, De la Huerta returned to Mexico at the end of 1918 to run for the governorship of his state, a post he won in April of the following year. By then, it was already evident that De la Huerta would back the political ambitions of Álvaro Obregón, perhaps the most influential of Sonora's sons at the time. As a result, the Governor of Sonora soon decided to openly confront the President of the Republic: by denouncing the attempt to impose Bonillas as Carranza's successor, Adolfo de la Huerta expected the latter to respond accordingly. Carranza wasted no time to prepare his response. In effect, little time had passed since the disagreement between Carranza and De la Huerta, when and old controversy ignited the discrepancies between the local authorities and the Federal Government: the debate concerning the jurisdiction of the waters of the Sonora River.[279]

Already in June 1919, the Ministry of Development had informed Plutarco Elías Calles, who was a few months away from finishing his term as head of the local government, that from then on the waters of that river would be considered as national waters under federal jurisdiction.[280] Upon taking office in September of that year, De la Huerta chose to remain silent on this controversy, busy as he was with solving a conflict with the Yaqui people, who opposed the colonisation and irrigation projects that over the past decades had destroyed their way of life in a territory they considered their own. Unlike the Mayos, who in those years finally accepted the way of life brought by the white settlers, the Yaquis maintained an intermittent armed resistance that was still in force

[278] Pedro Castro, "El movimiento de Agua Prieta: Las presencias sin olvido," *Estudios de Historia Moderna y Contemporánea de México*, vol. 17, no. 017 (1999), pp. 95-97

[279] Nicolás Pineda, "La jurisdicción de las aguas nacionales y el caso de las aguas estatales del río Sonora (1911-1960)" in Manuel Perló and Itzkuauhtli Zamora (coords.), *El estudio del agua en México*, Mexico City, Universidad Nacional Autónoma de México (2019), pp. 53-82

[280] Charles C. Cumberland, *La Revolución Mexicana: Los años constitucionalistas*, Mexico City, Fondo de Cultura Económica (1975), p. 367

in 1919.[281] In order to negotiate with the Yaqui leaders from a position of strength, the governor of Sonora needed the involvement of the federal troops stationed in his state, this being one of the reasons why De la Huerta originally acted cautiously in response to the Federal Government's demands.[282] However, at the end of that year, this position of equilibrium became untenable in light of the growing hostility that Mexico City demonstrated against the government of Sonora. For this reason, on January 13, 1920, the new governor requested a reconsideration of the decision previously adopted by the Ministry of Development in relation to the Sonora River, thus challenging the provisions of the federal authorities in this realm. On January 22, the Hermosillo City Council, like many other affected municipalities, seconded the State government's protest.[283]

Therefore, at the beginning of 1920 it seemed evident that the determination adopted by the federal authorities when declaring the existence of a superior jurisdiction over the waters of the Sonoran rivers had a clear purpose: to generate a political crisis that would allow to discredit once and for all Obregón's cause on a national scale. In fact, the legal controversies in relation to this issue had been settled as of 1911 in a way that was favourable for the local authorities, especially because the provisions of the 1910 Law of Use of Waters of Federal Jurisdiction made it possible to settle the dispute with a significant degree of legal certainty.[284] Once the 1917 Constitution was promulgated, the terms of Article 27 seemed to leave no room for doubt regarding the local nature of the jurisdiction that should govern the waters of the Sonora River.[285] However, since 1918 the federal government chose a different course of interpretation, decreeing that the waters of the most important Sonoran rivers were the property of the nation.[286] Furthermore, at the end of 1919 President Carranza ordered the Chief of Military Operations assigned to Sonora be substituted by General Juan José Ríos, who until then had performed a relevant commission at the War Ministry. At the same time, in May of the same year, General Plutarco Elías Calles was invited to serve at the

[281] Nicolás Cárdenas García, "'Lo que queremos es que salgan los blancos y las tropas': Yaquis y mexicanos en tiempos de revolución (1910-1920)," *Historia Mexicana*, vol. lxvi, no. 4 (2017), pp. 1863-1921
[282] Castro, Op. cit., p. 105
[283] Matute, Op. cit., *La carrera del Caudillo*, p. 92. Cf. with Pineda, Op. cit., p. 67
[284] This legislation added substance to the constitutional amendment made in June 1908 to allow Congress to determine which waters were under state jurisdiction. Pineda, Ibid., p. 61
[285] From the reading of the constitutional text, Nicolás Pineda concludes, it can be inferred that the rivers that constitute national waters must have the following characteristics: 1) flow into the sea, 2) cross two or more states, 3) serve as a boundary to the national territory or to that of the states. The Sonora River does not meet any of these requirements. Ibid. Pineda, pp. 61-65
[286] Ibid. Pineda, p. 64

cabinet as Minister of Industry, Commerce and Labour. Carranza's intention seemed obvious: to lay siege against the men of Sonora close to General Obregón.[287]

The Republic of Sonora and the Agua Prieta Rebellion

In 1920, the Mexican president doubled down on his bet by appointing General Manuel M. Diéguez as Chief of Operations in the Pacific. Considered a distinguished veteran of the revolution, Diéguez was given the leadership "of a vast area, which covered the entire northwest, including the Peninsula, and which extended to the western coastal states."[288] This appointment was conceived with the aim of destroying the political balances on which the governor of Sonora had founded his administration up to that moment, especially with regard to dialogue with the leaders of the Yaqui people. As Matute has pointed out, Diéguez was not only an unconditional of Carranza; he was also remembered "as a man with a heavy hand for the Yaquis."[289] Consequently, on March 30, 1920, Governor De la Huerta wrote to the president, expressing his concern about the imminent concentration of federal troops in his state. On his part, the president responded by pointing out that the movement of federal forces should not be considered as an attack on state sovereignty. However, in early April the federal military encirclement was completed with the deployment of Marine Infantry units in the port of Guaymas and, revealingly, with the decision to remove the border customs located in Sonoran territory from local control.[290]

In the following days, the Governor and the President continued to dialogue through a tense exchange of telegrams that fuelled a thousand rumours in the Mexican press of the time.[291] This relentless dialogue was finally interrupted on April 6, when the Sonora State Legislature openly questioned the right of the central government to deploy federal troops without an express request from local authorities.[292] By those days a bulletin from the Ministry of War was released stating that

[287] Matute, Op. cit., *La carrera del Caudillo*, p. 92. Cf. with Castro, Op. cit., p. 107
[288] Ibid. Matute, p. 93
[289] Loc. cit. Matute, p. 93
[290] Cumberland, Op. cit., pp. 368-70
[291] See, for instance "Alarmantes noticias llegan a esta ciudad del Estado de Sonora," *Excélsior*, vol. ii, no. 1112 (2 April 1920), p. 1. The exchange of telegrams between Carranza, De la Huerta, and Dieguez is reproduced in José Vasconcelos, *La caída de Carranza: de la dictadura a la libertad*, Mexico City, Imprenta de Murguía (1920), pp. 147-195. As for the role that rumours played in the dialogue held between Carranza and De la Huerta in those days consult considered Cumberland, Ibid., pp. 367-69
[292] Cumberland, Ibid., p. 369; Matute, Op. cit., p. 95

a large military contingent would soon arrive in Sonora with the aim of exterminating the Yaquis, a fact that was later denied by General Francisco L. Urquizo, then Undersecretary of War.[293] Yet, one of the most prominent figures of the Obregonista movement categorically answered this and other grievances: in a telegram addressed to Diéguez, General Plutarco Elías Calles assured the Chief of Operations in the Pacific that the people of Sonora had lost confidence in the central government and warned that if federal troops were to march into the state's territory, then "a civil war would ignited that may be the bloodiest of them all."[294] Thus, on the morning of April 9, "Calles placed himself at the command of the government of Sonora, to defend it in case its sovereignty was violated." The proposal was accepted by the State Secretary of Government, allowing Calles to assume command of those federal forces until then under the command of General Juan José Ríos.[295] At the same time, on April 10, the local legislature granted extraordinary powers to Governor Adolfo de la Huerta in the Treasury and War branches in order to face the incursion of federal forces into Sonoran territory. In the evening, the Government of the State of Sonora broke relations with the Federation.[296]

Scholars contend that President Carranza was an active contributor to this outcome, no doubt convinced that his government could quickly stop an insurrection that would ultimately discredit General Obregón's supporters. Previously, the latter had been summoned to Mexico City to give his statement in the process that the military justice held against General Roberto Cejudo, a former federal commander accused of sedition who declared that he had established contact with Obregón as part of the preparations of a new uprising.

Still on April 11, General Obregón was able to hold a meeting with General Pablo González in which both candidates established a common ground in order to confront what they considered to be the electoral imposition of Carranza. However, convinced that the federal authorities were trying to set him up, Obregón fled the capital and on April 13 arrived in Iguala, Guerrero, where he was received

[293] "Protesta del Congreso del E. de Sonora," *Excelsior*, vol. ii, no. 1119 (9 de abril de 1920), pp.1, 7
[294] "Telegrama del General Plutarco Elías Calles al General Manuel M. Diéguez," Nogales, Sonora (8 April 1920), reproduced in Vasconcelos, Op. cit., p. 184
[295] Castro, Op. cit., p. 104
[296] These powers were defined by Law No. 30, issued on April 11, 1920 by the State Legislature. Ibid. Castro, p. 111. The news of the breakup was released until Tuesday, April 13, by the newspapers. "El E. de Sonora desconoce el pacto federal," *Excelsior*, vol. ii, no. 1123 (13 April 1920), p. 1

by military commanders close to his cause.[297] That day the Sonora authorities released the Manifesto of the Three Powers of the State, a document that transcended the local sphere by pointing out that the abuses committed by President Carranza in the previous months had a national scale. On April 14, the front pages of the capital's most important newspapers announced that Sonora had become an "independent republic." [298]

From then on, events rapidly followed one another: Carranza ordered General Diéguez to occupy Sonora with his troops in order to crush the rebels. However, the mobilization was never to be completed: for a moment it became difficult to known if the ARM Guerrero, the gunship that the Chief of Operations in the Pacific hoped to count on to mobilise his Infantry Marines units, remained in hands loyal to the Federal Government.[299] Although the warship ultimately escaped from the siege to which she had been subjected by the rebels in the port of Guaymas, General Juan José Ríos had less luck: when he gathered his officers to find out if they would support the Government's cause, they deserted him *en masse*.[300] The same attitude was quickly repeated in other military emplacements, where generals loyal to the government were not recognised by the officers under their command, thus revealing the degree of discontent that President Carranza's military policy had generated in the previous years. Soon, many other generals took up arms supporting the governors who chose to follow the route of insurrection already opened by the Sonorans.[301] In a short time, many of the rebels that in previous years remained in a war footing against the government of Carranza also seconded the new plan. Considered by itself, the fact is not surprising: since the end of 1919 the agents of Obregón established ties with the insurgents, anticipating an outcome such as the one that finally occurred in the spring of 1920.[302]

Finally, on April 20, General Obregón broke the silence he had kept in the previous days, releasing a manifesto published in Chilpancingo, Guerrero. In the document, Obregón held Carranza politically responsible for everything that had happened since the beginning of the electoral

[297] Matute, Op. cit., *La carrera del Caudillo*, p. 104
[298] See for instance "Sonora se declara república independiente," *El Universal*, vol. xv, no. 1275 (14 de abril de 1920), p.1, and "Sonora fue declarada república," *Excelsior*, vol. ii, no. 1124 (14 de abril de 1920), p. 1
[299] "El cañonero Guerrero escapó de ser presa de los rebeldes," *El Universal*, vol. xv, no. 1275 (14 de abril de 1920), p. 1
[300] "Las tropas federales que se encontraban de guarnición en Sonora, desconocieron a su jefe el Gral. Juan J. Ríos, incorporándose al movimiento rebelde," *El Demócrata*, vol. vi, no. 1149 (14 de abril de 1920), p. 1
[301] Matute, Op. cit., p. 116
[302] Cumberland, Op. cit., p. 370

campaigns, abandoning his condition as presidential candidate and made a call to reconquer "with arms in hand, what with arms in hand they are trying to take away from us."[303] By reassuming his condition as soldier, Obregon placed himself immediately under the orders of Governor Adolfo de la Huerta.[304] Three days later, De la Huerta unveiled the Agua Prieta Plan, the last of the great revolutionary programs to call for a general insurrection that would prove successful in Mexico. Echoing a language that Carranza himself had used seven years ago, the plan called for the integration of a "Constitutionalist Liberal Army," and granted the governor of Sonora the tittle of Supreme Chief, establishing the mechanisms to confirm such a designation in the immediate future.[305] Therefore, the insurrection of the «armed citizens» who supported the political ambitions of an ambitious general was formally led by a civilian. However, the name of General Plutarco Elías Calles topped the list of the plan signatories, made up of no less than five brigadier generals, thirteen brigadier generals, and a large number of junior officers, also joined by the local authorities of Sonora.[306]

Carranza's last manifesto and the encounter with history

By late April, Carranza's military situation seemed unsustainable. For this reason, the president decided to leave the capital in order to establish his government in the port of Veracruz. Once again, he wanted to repeat one of the feats he had performed during the most complex moments of the Mexican civil war, when at the end of 1914 he sought refuge in that city in order to face the siege imposed on his government by the Division of the North and the armies of the Sovereign Revolutionary Convention. Yet, writes Matute, "that good student of history that Carranza had been, trusted too much in the cyclical possibilities of events."[307] On this occasion Fortuna would be averse to him: the waters of the present were very different from those of the rivers that the president had bent in previous years.

[303] Álvaro Obregón, "Manifiesto," Chilpancingo de los Bravos (30 de abril de 1920), reproduced in Vasconcelos, Op. cit., p. 205
[304] Cumberland, Op. cit., p. 371
[305] "Plan de Agua Prieta," Agua Prieta, Sonora (23 April 1920), reproduced in Vasconcelos, Op. cit. pp. 195-202
[306] Ibid., pp. 201-202
[307] Matute, Op. cit., *La carrera del Caudillo*, p. 125

On May 5, 1920, the president issued what would be his last manifesto to the nation, describing the serious political circumstances the country was experiencing at the time. The choice of that date was not fortuitous: by publicising his position on the anniversary of the military victory that Mexico won in 1862 against the French armies of the Second Empire, the president wanted to highlight the historic commitment that his administration had assumed in the defence of the institutions of the Republic.[308] No less relevant is the content of the manifesto, which summarized Carranza's ideas in relation to the electoral process that the country had experienced since 1919. Given the ambitions of the militarists, the president pointed out, the possibility of resorting to a civilian candidate "evolved in public opinion until it became a well-defined political trend, and as a remedy against the threat of civil war and strongman politics."[309] For this reason, the president concluded, once the candidacy of Mr. Bonillas emerged as a real alternative to military candidacies, it became evident that General Obregón abandoned the legitimate purposes of his campaign to start traveling the country in order to prepare a new armed uprising. Nothing better could be said of General González: despite having been invited to defend the legal order in danger, not even the extreme gravity of the circumstances that the country was experiencing at that time led him to lay down his political ambition.[310]

In light of these considerations, Carranza summarized for the last time the scope of the historical responsibility that he believed to have assumed since the beginning of the Mexican civil war in the following terms:

> As Head of the Party that carried out the Constitutionalist Revolution, I must declare that I consider as one of the highest duties that I have before History, to leave recognized, affirmed, and established the principle that the Public Power should no longer be in the future an award for military caudillos, whose revolutionary merits, no matter how great, are not enough to excuse further acts of ambition.[311]

[308] Ibid., p. 116
[309] Venustiano Carranza, "Manifiesto a la Nación," *El Demócrata*, vol. vi, no. 1171 (6 de mayo de 1920), p. 5
[310] Loc. cit.
[311] "Como Jefe del Partido que llevó a cabo la Revolución Constitucionalista, debo declarar que considero como uno de los más altos deberes que tengo ante la Historia, el dejar sentado, afirmado y establecido el principio de que el Poder Público no debe ser ya en lo futuro un premio a los caudillos militares, cuyos méritos revolucionarios, por grandes que sean, no bastan para excusar posteriores actos de ambición." Loc. cit.

To face the danger that loomed over the fate of the nation, the president appealed to the loyalty of the National Army but, above all, he made a double call to the people of Mexico: first he demanded "new soldiers" willing to lend their support to the constituted government; then he called for a renewed war effort to uphold the democratic principles for which the revolution had fought since 1910.[312] Carranza, Álvaro Matute points out, insisted until the end "on the opposition between civilism and militarism, giving a positive connotation to the former and a negative charge to the latter." Nevertheless, the presidential appeal exerted little influence among a population exhausted by years and years armed of violence. The Mexico of 1920 did not lacked readers capable of understanding the message of Carranza's manifesto, but most of them were confined to the great urban centres like the Capital of the Republic.

The same day that the manifesto was released among the main newspapers of Mexico City, the president ordered to transfer his government to the port of Veracruz. A massive convoy headed by the Presidential Train gathered on May 7 at the Buenavista railway station in order to leave Mexico City as soon as possible. Carranza's decision, which involved all cabinet members, many high-ranking federal officials, as well as members of the Supreme Court of Justice and a significant number of legislators, was a logistical and operational feat that was difficult to accomplish. Protected by the soldiers of General Francisco Murguía, the trains created a wide defence line that could only with difficulty be preserved from the attack of the rebel forces, which now enjoyed control of many of the territories through which the convoy would cross. Its rear was guarded by a regiment of cadets from the Military College, an institution that Carranza had re-established in January 1920 as part of the military professionalisation program that the President had promoted since the beginning of his administration.[313]

Persecuted by forces loyal to General Pablo González, the convoy crossed the stretch between Mexico and Apizaco with difficulty. At the Rinconada railway station, a small town belonging at that time to the municipality of Soltepec, took place a war action that was favourable to the troops loyal to the Government, led with success by General Murguía. However, the significance of that brief victory had a tactical character that could not remedy the desperate strategic situation of the

[312] Loc. cit.
[313] Cumberland, Op. cit., p. 372

presidential convoy: after leaving Rinconada behind, those loyal to the Government learned that General Jacinto B. Treviño was heading in his rear with a contingent of 20,000 men.[314]

Finally, on May 13, the convoy came to a dead-end in Aljibes, Puebla. There a dilemma was raised: either face at that place the forces that were persecuting the governmental convoy or leave behind the trains for an internment into the mountain range of the Sierra de Puebla, with the hope of reaching friendly territory in Veracruz. Resolved, the president decided on the last option, trusting on the help of General Rodolfo Herrero, a former federal commander who had become strong man of the region with the consent of the Constitutionalist authorities. The decision would prove fatal: Herrero had previously reached an agreement with Obregón's supporters and on May 20 he facilitated the ambush that finally took the life of President Venustiano Carranza in Tlaxcalantongo, Puebla.[315]

Sonora and the foundations of the Mexican strategic culture in the twentieth century

Until the end, Carranza believed that he would be able to repeat the feat carried out in 1914, thus demonstrating that his eyes were not placed on the construction of the future but on the recreation of a political past that would never return. Fatally, the president made a mistake when he wanted to interpret the character of the strategic landscape of 1920 with the perspective that he had used six years before, when an entirely different political situation prevailed in Mexico. On the other hand, Carranza also seemed to underestimate the dangerous complexity of the political process begun in 1919, when a country fractured by several years of civil war tried to rehearse a return to a type of democratic institutional life for which it was poorly prepared. Convinced that he could control the political game of the generals who until recently had been under his command, he paid with his life for the pretence of favouring a civilian as a candidate for the presidency of the Republic. If Fortuna presented the president with one last chance to face the change of time, the truth is that Carranza was unable to depart from the formulas that had been useful to him in the past: consequently, his actions began to differ "from the time and the order of things." [316] In this, the Mexican president was no different from many other princes who have lost their states, for

[314] Matute, Op. cit., *La carrera del Caudillo*, p. 125-27
[315] Ibid., pp. 127-30
[316] Niccolò Machiavelli to Giovani Battista Soderini, Perugia (13 September 1506) in Juan Manuel Forte (ed.), *Epistolario privado*, Madrid, La Esfera de los Libros (2007), p. 109

"when one has always flourished by walking on one path, he cannot be persuaded to depart from it".[317] Proof of this is found in the enormous care that Carranza gave to his manifestos at a time when the priority was to organize the armed defence of his government. However, the president forgot that, as Matute pointed out when presenting his conclusions on this issue, "armies are defeated with armies," not with harangues.[318]

In contrast, since 1917 General Álvaro Obregón demonstrated that his strategic competence was not limited exclusively to the battlefields: from 1919 on his supporters established a permanent political dialogue with all those groups that were dissatisfied with the Carranza administration. In favour of his cause, Obregón successfully won the support of the Regional Workers Confederation of Mexico and embraced the concerns of a series of political and social actors that just a decade earlier were marginal or non-existent, as happened with formations such as the Cooperatist Party, the Labour Party and the National Agrarist Party. [319] No less important was the fact that the most popular general of the Mexican Revolution presented himself as an "independent candidate", oblivious to the machinations of the political forces that formally nominated him. As a result, in the manifesto that he released in June of that year, Obregón not only proclaimed his loyalty to the cause of a notional Liberal Party; he also pointed out that his political program would pay special attention to the moral problems created by the behaviour of the main leaders of the revolution, including its main military commanders.[320] In this way, Obregón seemed to understand that the game of strategy can be conceived "as a story about power told in the future tense from the perspective of a leading character."[321] Finally, by anticipating that a definitive break with Carranza would lead him back to the road of an armed struggle, Obregón also forged ties with many of those rebels who, in the spring of that year, were still fighting against the government forces.[322] Thus, Obregón took into his hands the demand to channel the waters of the present to anticipate the construction of the future, interpreting with greater skill than Carranza the possibilities that the situation offered in strategic terms.

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[317] Niccolò Machiavelli, *The Prince*, Chap. XXV, trans. by Harvey C. Mansfield, Chicago, The University of Chicago Press (1998), p. 100
[318] Matute, Op. cit., p. 133
[319] Ibid., pp. 67-68
[320] Álvaro Obregón, "Manifiesto a la República" in Vasconcelos, Op. cit., pp. 3-26
[321] Lawrence Freedman, *Strategy: A History*, Oxford, Oxford University Press (2013), p. 608
[322] Matute, Op. cit., pp. 65-70

Roads not taken: the fate of the civilist cause at the beginning of the last century

In Borges's literary universe, the construction of a labyrinth always remains in the hands of the architect who deliberately defined the complexity of his narrative inventions. Ultimately, everything becomes a matter of perspective because, as Weed has pointed out following the work of Penelope Reed Doob, a labyrinth can be observed in many ways: those who have the opportunity to see it from above can discover the complexity of its structures; in contrast, those who find themselves wandering its paths live under the impression that such a chaos lacks visible governance. Be that as it may, the truth is that a labyrinth is not merely a spatial structure, but a symbolic construct with its own temporal dimension.[323] As it results evident, in the realm of historical events, the structure of the labyrinth (which at times corresponds to the reality of the social world) cannot be determined *ex ante*; forged thanks to the intervention of those who take part in the day-to-day historical unfolding, the labyrinth only reveals all its complexity once the paths have already been covered. Nevertheless, by choosing specific paths, historical actors can make clear their determination to behave in genuinely strategic terms to alter the course of the present. Notably, those who do so aspire to arrive at a future that has first been conceived in the provinces of political imagination.

Yet, it is pertinent to recognize that we are not at all times in the position to determine whether the actions taken by the historical actors were really governed by strategic considerations. After all, an historical event can only be reconstructed *ex post* through a narrative device that is conditioned by the limitations of all historiographic work. In any case, this reconstruction is always conditioned by the purposes of the writer: "Liddell Hart," wrote Professor Freedman, "collected stories of battle and then gave them his own twist to validate his indirect approach."[324] Similarly, Weed notes, the work by Liddell Hart that is considered in Borges' tale ends up being confused with the work that was actually published around 1930: "The history written by 'Liddell Hart' in the story is a fiction, but the real history, written by the real Liddell Hart, indeed any book of history, is also

[323] Ethan Weed, "A Labyrinth of Symbols: Exploring 'The Garden of Forking Paths'," *Variaciones Borges*, no. 18 (2004), p. 185. Weed's position on this issue follows the work of Penelope Reed Doob in *The Idea of the Labyrinth from Classical Antiquity through the Middle Ages*, Ithaca, Cornell University Press (1992), pp. xx-355. At the same time, Reed Doob considers the works of Hermann Kern, W. H. Matthews and Paolo Santarcangeli as important references for her own book.
[324] Freedman, Op. cit., p. 617

a fiction."[325] At least to some extent for, as Freedman himself has warned us following the work of Charles Tilly, human societies are always in need of master narratives if they want to thrive and prosper.[326] Yet, sometimes it is necessary to know what is the origin of the thread with which each story has been woven, because only then is it possible to weigh its worth at the moment of orienting ourselves in the labyrinth of reality.[327]

All this is important when considering the Mexican experience around 1920, especially because, as Johan Huizinga once wrote, it is a very cheap historical wisdom to "to consider as non-viable all the things that have not come to fruition."[328] What would have happened in Mexico if Carranza had prevailed in the spring of 1920? Could the military policy that he promoted from 1917 on have been consolidated? Without any doubt, the early establishment of a civilist regime would have granted a completely different coloration to the Mexican twentieth century. At times the President had elements of judgment that allowed him to believe that this would be the case: on the night of April 13, 1920, anticipating a behaviour that would later be common in other democratic societies, General Juan Barragán, Chief of the Presidential General Staff, gathered a group of journalists in his offices in the National Palace to publicise the measures that the government had taken to suppress the insurrection in Sonora.[329] Two years earlier, in May 1918, Carranza had summoned the Chief of the Presidential General Staff to assess the progress of the country's pacification process. On that occasion, Barragán gave an optimistic account of the situation, highlighting the success of the military operations undertaken in Tamaulipas, Puebla, Tlaxcala and Guerrero, where the government forces were neutralising important sources of armed insurrection.[330] On the other hand, the counterinsurgency campaign launched by General Pablo González in Morelos throughout the following year finally allowed Emiliano Zapata to be killed in an operation that yielded the expected result on April 10, 1919.[331] In Coahuila, the Division of the North was subjected to a permanent siege by federal forces that also yielded significant results: on November 26, 1919,

[325] Weed, Op. cit., p. 171
[326] Freedman, Op. cit., pp. 615-16
[327] Carlo Ginzburg, "Introducción" in *El hilo y las huellas*, Mexico City, Fondo de Cultura Económica (2010), pp. 9-18
[328] Johan Huizinga, *El concepto de la historia y otros ensayos*, Mexico City, Fondo de Cultura Económica (1946), p. 177
[329] "Boletín del Estado Mayor Presidencial," *El Demócrata*, vol. vi, no. 1149 (14 de abril de 1920), p. 1
[330] Ávila, Op. cit., p. 344
[331] Ibid., pp. 358-59

General Felipe Ángeles, a talented commander of a federal origin that in the previous years rendered invaluable military services to the cause of Francisco Villa, was captured and shot.[332]

Finally, the military policy that Carranza promoted during those years was aimed at consolidating a group of generals loyal to the presidential institution and not to the figure of the main military caudillos such as González or Obregón.[333] In 1917 the country had ten active division generals of which four remained on the side of the President until the end. However, the loyalty of these commanders was of little use when many of them discovered that their subordinates refused to follow their orders. Apparently, as Matute has suggested, the «civilist» propaganda had an unexpected echo among the officer corps of the nascent National Army: since the grave responsibility of pacifying the country had fallen on them, the aspiration to impose a civilian government was considered as an affront by those who had enjoyed the prerogatives of violence in previous years.[334] For the troops the issue was no less relevant, since in their permanent mobilisation soldiers had found subsistence means that largely compensated the difficult economic circumstances of a war-torn country.[335] Such were, consequently, the antinomies that, according to Matute, the president could never resolve. In the short number of years that followed, Carranza sought to reinforce his military policy by adopting measures that at first glance were successful: he created a Commission of Studies with the aim of advancing the professionalisation of the armed forces, established a General Staff Academy and, finally, looked for alternatives to guarantee the production of munitions and other war materials in Mexico's national territory.[336] However, the mistrust against the provisions adopted by the president never ceased: in 1920 General Jacinto B. Treviño, the commander to whom Carranza had entrusted the task of presiding over the works of the Commission, joined the cause of the rebels of Agua Prieta.[337]

On the other hand, the Sonorans had well-founded reasons to distrust the president. According to the testimony of Adolfo de la Huerta's private secretary, shortly before their definite breakup, Carranza told the governor of Sonora that he had seriously considered his nomination as a

[332] Ibid., p. 363
[333] Matute, Op. cit., *Del Ejército Constitucionalista al Ejército Nacional*, pp. 157-60; García Diego, Op. cit., pp. 439-40
[334] Matute, Op. cit., *La carrera del Caudillo*, p. 131
[335] García Diego, Op. cit., pp. 456-58
[336] Ibid., pp. 442-47
[337] Ibid., p. 464

presidential candidate. The manoeuvre was clear: if De la Huerta accepted his proposal, his decision would fracture the unity of the Sonoran group, creating dissent within the Obregonist ranks.[338] In this respect, it is worth remembering what was said by one of the governor's closest collaborators on that occasion:

> Already Carranza previously wanted to sound out De la Huerta's attitude by offering him the post of Interior Minister, but the latter refused to accept that position on the grounds that after having been elected governor of his state, his acceptance would be a mockery of the people's mandate.[339]

Carranza thus repeated a behaviour that he had systematically observed with Plutarco Elías Calles and other figures from Sonora close to the Constitutionalist Movement, including Ignacio Bonillas, the unfortunate candidate of the civilist group.

Confident in the results of a long political trajectory that began in 1886, Carranza did not hesitate to replicate on a national scale many of the practices that at other times he repudiated at the local level. Thus, for example, in addition to practicing the art of political clientele, the president appointed military commanders in specific regions in order to confront them with the local civilian authorities. Additionally, Carranza also openly intervened in the election of mayors and governors to impose his favourites and, on occasions, he censored those journalists who criticised his procedures.[340] Therefore, everything seems to suggest that Carranza was not inclined to respect the rules of the new democratic process that he himself sought to establish in 1917.

So, from 1920 on the paths narrowed: in his effort to funnel the presidential transition to a concrete result, Carranza adopted a series of decisions that ultimately closed the doors to a favourable outcome for the civilist cause. Once that future was cancelled, the triumph of the Agua Prieta rebellion opened the doors for the development of a political regime that granted to the military

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[338] The complex political process that led to the break between Venustiano Carranza and Adolfo de la Huerta is summarised by Pedro Castro in Op. cit., pp. 96-99

[339] "Ya Carranza, con anterioridad, había querido sondear la actitud de De la Huerta ofreciéndole la cartera de Gobernación, pero este se negó a aceptarla aduciendo que tras de haber sido electo gobernador de su Estado, su aceptación significaría una burla al mandato del pueblo." Roberto E. Guzmán Esparza, "La actitud de Carranza para De la Huerta" in *Memorias de Don Adolfo de la Huerta*, Mexico City, Ediciones Guzmán (1957) p. 139

[340] Cumberland, Op. cit., pp. 328-35

question a solution very different from the one that Carranza had imagined. To understand why this was so, it is convenient to pay attention to the central features of the political culture that Sonora projected on to the rest of Mexico once the group led by Obregón seized power.

The legacy of Sonora and the return to order by armed means

If Sonora retains a central place in the account of what happened at the end of the Mexican civil war, it is because the political practices that this frontier society forged on the threshold of modernity soon became central references for Mexican public life. With the triumph of the Agua Prieta rebellion, the political culture that was arduously forged in the north of the country definitively broke into the waters of the country's national history, bringing with it a particular way of conceiving the modernization process through which Mexico would advance to from then on. As Aguilar Camín pointed some decades ago, the usual certainty in relation to the Mexican revolutionary experience consists in thinking that it "had an essentially agrarian content whose heart is Zapatismo." However, Aguilar Camín concludes, perhaps it is convenient to think that its meaning "is better revealed in the opposite hypothesis: the northern armies brought to power the sons of an immense region with a very remote idea of what the historical and human intimacy from the centre, the Bajío or the south of the country could be."[341] The interpretation essay written in 1973 by Barry Carr also does not lie in relation to the peculiarities of the Mexican north, which has been inhabited since the late nineteenth century by men who "shared the incessant mobility and the absence of ties with tradition, typical a frontier society."[342]

Therefore, it would be a mistake to think that the call to defend state sovereignty to which Governor Adolfo de la Huerta appealed was merely a legal recourse: in fact it was the expression of a solid feature of political identity that the leaders of Sonora cultivated in the last two hundred years, when their communities faced the most diverse dangers in an autonomous fashion.[343] Thus, everything suggest that the pride that General Calles felt when Agua Prieta was invoked at the head of the plan that justified the uprising against Carranza was sincere: the small republic of Calles

[341] Héctor Aguilar Camín, *La frontera nómada: Sonora y la Revolución mexicana*, Mexico City, Fondo de Cultura Económica (2017), p. 771. The first edition of this work was published by Siglo Veintiuno Editores in 1977.
[342] Barry Carr, "Las peculiaridades del norte mexicano, 1880-1927: Ensayo de interpretación," *Historia Mexicana*, vol. 22, no. 3 (1973), p. 335
[343] Almada Bay, Op. cit., p. 753

was one of the many Sonoran towns that had previously forged a mode of social coexistence of its own, defined by the historical isolation of that portion of Mexico's national territory.[344]

According to Ignacio Almada Bay, that isolation became a "state of affairs" that from very early on defined the nature of politics in Sonora:

> That is, the relative isolation with the centre of the country, the aggressive proximity of the Americans and the persistence in this region of endemic wars with the Indians, favoured a peculiar social order, a state of affairs different from the legal order expressed in the laws, a social order sustained on a fragile balance of interests, in permanent tension, constituted on a daily basis.[345]

As in any society dominated by pre-modern traits, the existence of kinship ties occupied a central place in the constitution of local elites. In this way, the Sonoran social order rested "on arrangements between individuals, between local actors, typical of an environment founded on personal relationships, which entails a dispersion of power."[346] It is not strange then that in the days of the armed struggle Obregon surrounded himself with those men with whom he had shared the experience of the local government and relevant family and business bonds.

Nevertheless, from the 1880s on the Sonoran society was forced to negotiate its entry into a particular version of the capitalist modernity that arrived to the north of Mexico thanks to the development of new railway lines, the increase of foreign investments and a central government capable of projecting in an increasingly effective way the political and military authority of Mexico City.[347] Since then, the sons of Sonora had to work with a redoubled effort to be able to preserve all that they had previously gained in a land colonised at the cost of great sacrifices and dangers. Thus, in a short time they discovered that the best way to preserve their interests was in the possibility of forming coalitions with other political and social actors.[348] Apparently without knowing it, little by

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[344] Castro, Op. cit., p. 112

[345] "Es decir, el aislamiento relativo con el centro del país, la agresiva cercanía de los estadounidenses y la persistencia en esta región de guerras endémicas con los indios, favorecieron un orden social peculiar, un estado de cosas diferente al orden legal expresado en las leyes, un orden social sustentado sobre un frágil equilibrio de intereses, en permanente tensión, constituido cotidianamente." Almada Bay, Op. cit., p. 731

[346] Loc. cit.

[347] Carr, Op. cit., pp. 325-31. Cf. with Almada Bay, Ibid., pp. 752-54

[348] Ibid., Almada Bay, p. 777

little they conquered a cunning instinct that would later prove its utility in national politics: forged by the demand to build a personal destiny that was originally related to the desire of seeing prosper their agricultural, commercial and business initiatives in their communities, the Sonorans soon were recognized as men of action, oblivious to any type of speculation of a theoretical or ideological nature.[349] Over time, their pragmatism was considered the most tangible expression of the set of civic virtues to which the new revolutionary State built in Mexico since 1920 would have to resort.[350]

Therefore, and due to its origins, the Constitutionalist Army reproduced within its ranks many of the constitutive features of the political culture that developed in Sonora during the years prior to the outbreak of the Mexican civil war. A the same time, it must be stressed that this army also drew on a self-defence tradition that was shared by many other societies in northern Mexico.[351] Originally created thanks to an exercise of legal argumentation that rested on the dialogue that Governor Venustiano Carranza established with the Legislature of the State of Coahuila in order to interpret the political significance of the February 1913 coup, the Constitutionalist Army was originally conformed by soldiers and officers that belonged to state militias armed, disciplined, and equipped with particular efficiency by the local administrations on which they originally depended.[352] Most of the men who belonged to these units served as auxiliary troops or members of the New Rural Corps established in the aftermath of the 1910 uprising, when the Madero administration resorted to them in order to confront its domestic enemies in the north of Mexico. As a result, as Garciadiego has noted, the Constitutionalist Army had a military origin that preceded its formal establishment in legal terms.[353] Ultimately, the existence of a large group of civilians and soldiers with experience of government at the local level would be invaluable for the Constitutionalist Movement, especially because that experience prepared them for a task that from 1917 seemed inescapable: to lay the foundations of a new political order where revolutionary violence had left only rubble and ashes.

[349] Carr, Op. cit., pp. 335-36
[350] Ibid., pp. 336-39
[351] Aguilar Camín, Op. cit., p. 797
[352] Ibid., pp. 797-98
[353] Javier Garciadiego, "La efeméride oficial y los varios orígenes del Ejército Mexicano" in Javier Garciadiego (coord.), *El Ejército Mexicano, cien años de historia*, Mexico City, El Colegio de México (2014), pp. 11-28

That said, it is necessary to note that the experience of the revolutionary war also sowed many of the seeds that would later bear fruit in the fields of national politics during the following decades. To point out that the Constitutionalist Army inherited many of the strengths of the state militias of northern Mexico is not to say that it was a professional army in the sense that today is given to that term: although Carranza's efforts were oriented towards the centralization of command and the concentration of powers in the hands of the Executive, the aspiration to effectively control its generals found a powerful counterbalance in the successes that the latter obtained on the battlefield. It was not surprising, then, that the loyalty of the soldiers tended to revolve around the figure of the commanders who had led them to victory in those years.[354] To face this reality, the First Chief resorted to a dangerous game: to influence the behaviour of his generals by conditioning the supply of armament, equipment and other resources necessary for the success of the campaigns.[355] To condition the monthly payment of the troops, limiting as well the supply of munitions to each commander became a mechanism of political control to which the Carranza administration constantly resorted.

In the long run, this game brought unsuspected results as the generals deployed throughout the national territory quickly discovered that they could resort to other means to obtain the resources that Carranza denied to them. When the proverbial practice of living off the land was exhausted, the revolutionary armies did not hesitate to resort to expropriation, theft and looting. Soon their commanders understood that their position could not be subordinated to this kind of activities. As a result, dialogue with social and economic groups in the regions in which they operated became a central component of a complex negotiation exercise in which obtaining resources to finance the war effort was the initial priority.[356] According to Luis Medina Peña, while Carranza worked diligently to shore up the central government's control over customs, ports and other emplacements that were particularly important for the operation of a public treasury seriously weakened by the realities of war, his generals learned that the art of doing business was essential to break all ties of dependency with the national authorities. Necessity gave way to opportunity: under the protection of the ties they established with the elites of the areas in which they were deployed, the commanders consolidated new bases of local power that in many cases led to new

[354] Medina Peña, Op. cit., p. 26
[355] García Diego, Op. cit., pp. 438-39
[356] Medina Peña, Op. cit., pp. 34-35

regional chiefdoms.[357] The dissolution of the borders between political power and private economic activities thus became a founding feature of the order of things that emerged at the end of the Mexican civil war.

On the other hand, the revolutionary experience also made evident the limits of the «civilist» political alternative that Carranza sought to impose in Mexico from 1919. By then the country already had a wide range of groups and interests organised around structures that formally adopted the format of the political parties and unions existing in other societies. However, for many observers of the period it was evident that these structures only existed thanks to the patronage of strong men with a marked personalist vocation.[358] Even more important: the war experience showed many Mexicans that resorting to armed violence could be more efficient in achieving their political purposes than the observance of the rules of a democratic process that only made sense in the most important urban centres of the country.[359] Cumberland recalls that in those years it was not uncommon to see candidates surrounded by armed men, always ready to settle their differences with other political actors at gunpoint.[360] As Piccato has pointed out, in the following decades *pistoleros* (gunmen) became a constant in the Mexican social landscape.[361] Previously, other groups had already resorted to arms to enforce the defence of their interests: the incessant movement of bandits, insurgents and soldiers was also joined by the armed *agraristas* (armed peasants), *defensas sociales* (communal armed groups) linked to specific local communities, and the *batallones rojos* (armed workers) that for a moment embraced the Constitutionalist cause. "There had been a massive importation of weapons, and a whole generation of young people had been trained in their use," point outs Alan Knight. Ultimately, he concludes, those who had elected the use of violence "crossed the psychological threshold that divides the 'peaceful' from the 'military,' they had become accustomed to violence, even, in certain cases, to murder."[362] All of this, of course, generated persistent patterns of behaviour: it is not an exaggeration to say that there was a time when the future of the country was entirely in the hands of men who forged their

[357] Ibid., pp. 35-36
[358] Matute, Op. cit., p. 63
[359] Medina Peña, Op. cit., p. 29
[360] Cumberland, Op. cit., p. 336
[361] Picatto, Op. cit., pp. 163-66
[362] Knight, *Guerra Total*, Op. cit., pp. 1645-48

political careers thanks to the exercise of violence. For this reason, for a long time the possibility of distinguishing warriors from brigands made no sense in Mexico.

But if this was the case, what then to say about the confrontation that led to Carranza's downfall? According to Garciadiego, the clash between the civilist and the militarist factions never was so clear-cut, because in both sides there were civilian and military men alike.[363] Nevertheless, it is evident that the clash between the generals close to Obregón and the First Chief found an initial fundament in the disdain that the revolutionary military men felt against those civilians whowere not present in the front line. Is it possible to sustain then that such attitude established the basis of a national variant of militarism similar to that which other societies experienced during the same period? In a sense the answer is positive, but only if we recognise that Mexican militarism was expressed at the time in a peculiar way: not as the exaltation of a professional military institution —which formally disappeared in 1914—, but as the exaltation of the «armed citizens» that took in their hands the defence of the revolutionary cause.

Alfred Vagts' thought in relation to this issue helps to illuminate the circumstances of the Mexican historical experience, especially when he points out that militarism is much more than the love of war, since potentially it also concerns the inclination of all those social groups tending to privilege the military way of life over the civilian. In this sense, the Mexican veterans found that civilism was an elitist position, contrary to the popular spirit of the revolutionary experience that their country had lived since 1910.[364] It could not be otherwise: the nascent Mexican militarism articulated many of the aspirations of the civilians who took part in the civil war. It was thus a «civil militarism» headed by those who found in the hard experience of combat a series of socially desirable values that were later transferred to the political sphere.[365] In the following decades, these values would also feed the rhetoric of «revolutionary nationalism» and would give way to one of the most enduring myths of Mexico's political culture: the thesis that the Mexican Army is the "people in uniform," always loyal to the institutions of the Republic.[366]

[363] Garciadiego, Op. cit., p. 455
[364] Matute, Op. cit., p. 61
[365] Alfred Vagts, *A History of Militarism: Civilian and Military*, New York, The Free Press (1959), pp. 21-23
[366] This expression, to which have frequently recurred the Mexican ministers of National Defence in the last years, is part of a narrative carefully constructed within the armed institute itself. See, for example, Guillermo Galván, "Discurso del Alto Mando del Ejército y Fuerza Aérea mexicanos con motivo del Día del Ejército," Mexico City (19 February 2007), p. 7

Conclusion

In the narrative of the regime established after the Agua Prieta rebellion, the founding moment of the new revolutionary state did not take place on 23 April 1920, but on 5 February 1917. This was the date on which Carranza proclaimed the new Political Constitution, with which he sought to crown the work of the Mexican Revolution. Similarly, the date chosen to commemorate the establishment of the National Army is the one that Carranza's supporters consigned in February 1913, when the Plan de Guadalupe recognized the governor of Coahuila as First Chief of a future "Constitutionalist Army." The fact is significant, since it reveals that the uprising of 1920 did not seek to part ways with the revolutionary program that the president had previously essayed. Rather, when the generals led by Obregón broke with Carranza, they actually did so for a more immediate purpose: simply to depose the man who was trying to close the doors to their political ambitions. However, the pragmatism embraced by the men of Sonora was never incompatible with the Constitutionalist programme, which was originally fed by the theses of the Mexican liberal reformist movement of the late nineteenth century. For this reason, Luis Barrón has pointed out that Carranza was in fact the last great Porfirian reformer of Mexico.[367]

However, since 1913 the Mexican revolutionaries took substantial steps in favour of a deep transformation of the economic structures of their country: by destroying the property regime that had prevailed in previous decades, favourable to the concentration of land in very few hands, they also displaced the old agrarian aristocracy that until then had occupied a determinant place in Mexico's political life.[368] Once in power, the Sonora group would work decisively to carry out with greater energy what Carranza could never achieve: build a strong state that did not hesitate to resort to the political, ideological and cultural building blocks that the Porfirio Díaz regime had previously bequeathed to Mexico, entering, at the same time, in the provinces of political innovation. Their effort would not be without rewards because, at least until 1935, "Sonorismo" would take care to turn Mexico into a privileged field of opportunities for the social ascendance, material prosperity and political hegemony of all those that originally embraced the cause of the Agua Prieta rebellion.[369]

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[367] Al respecto consúltese Luis F. Barrón, *Venustiano Carranza: un político porfiriano en la Revolución*, documento de trabajo no. 46, Mexico City, Centro de Investigación y Docencia Económicas (2007), pp. 22

[368] Knight, Op. cit., pp. 27

[369] Almada Bay, Op. cit., pp. 729-30, 776-77

Yet, as it has happened every time that a society comes out victorious after the experience of a great armed conflict, from 1920 on the need to initiate an ample process of national reconstruction was evident in Mexico. To grant a more solid support to the new state, the revolutionary leaders that arrived to power after the Agua Prieta rebellion were in the need to create a new political culture according to the demands of the time: *1)* to restore order within the Mexican national territory, *2)* to lay the foundations for a solid economic reconstruction, and *3)* to face an uncertain international environment. Thus, the possibility of matching the lofty political and social aspirations that the Mexican Revolution had raised with the limited resources that at that time were at the disposal of the new rulers of Mexico would not be an easy task. One priority, among all, was urgent: preventing another successful rebellion from displacing the victors from Agua Prieta from power. In their effort to find an adequate balance to face those challenges, the new regime would be forced to conciliate grand-purposes of national scope with the dynamics of events at regional and local scale where their ability to directly influence events would not always be evident. By accepting many of the practices that defined the actions of the «armed citizens» during the civil war, the governments of the Revolution would make possible the persistence of patterns of behaviour that would later have a determining influence on the way in which Mexicans have conceived the relationship between civilians and the military in their country. In this way, the needs of the moment created the conditions for the development of a certain strategic culture in which the use of military force was confined to tasks directly related to the maintenance of order at the domestic level. Gradually the use of violence shifted towards the margins of the nascent Mexican political system, where the authorities could delegate its exercise to subsidiary armed actors, thus avoiding its most pernicious impacts. On this basis, the central orientation of the grand-strategic behaviour that Mexico embraced throughout the 20th century was established.

Chapter 3. The new order and the twilight of the «armed citizens», 1920-1924

"No one has seen a river in formation, when it has not yet made the flow nor opted for a definitive course," wrote Alfonso Reyes in 1937, when the direction adopted by the Mexican Revolution seemed more and more immovable and certain.[370] However, the eminent Mexican writer noted, "history is much faster than geography" and there are occasions when the water course is governed by a deep gravitation that unites the tributaries "to engross and shape its trajectory over the soils."[371] The great upheaval that Mexico experienced after 1910 destroyed the dams that once had held back the waters of history, but little had been done since then to redress those waters. In the summer of 1920, Mexico's situation was still uncertain and unsettling: the country was isolated internationally, devastated by a decade of armed conflict and at the mercy of a government headed by men who only months earlier led an armed rebellion that resulted in the death of the President of the Republic. For the British observers of the period, Lorenzo Meyer points out, the triumph of the Agua Prieta rebellion "only meant one more episode in an endless process of political degradation."[372]

As far as domestic challenges were concerned, the situation was not particularly encouraging. "When Obregón took power in 1920, the political unity of the country did not exist. The president was far from having the control and power that Porfirio Díaz had achieved; his situation was rather that of *primus inter pares*. His control over the local military chiefs was rather limited," points out Meyer.[373] Like Carranza, Obregón assumed that the most urgent task of his administration was to move forward with the reconstruction of a country devastated by years of civil war. However, unlike Carranza, Mexico's new strongman also understood that the period of force was not yet over, so he never hesitated to resort to it to put down the enemies of the revolution —especially when they came from within the ranks of his own armies. Caudillo by his deeds of arms, by his charisma and by his political genius, Obregón faced a new regional political universe, inhabited by caciques who

[370] Alfonso Reyes, "México en una nuez" in *La X en la frente*, Mexico City, Universidad Nacional Autónoma de México (1993), p. 174. This small piece was originally read by Reyes in Buenos Aires on November 8, 1937, within the framework of the Festival of Friends of the Spanish Republic.
[371] Ibid., p. 175
[372] Lorenzo Meyer, "Constituciones y conspiraciones" in *Su Majestad Británica contra la Revolución Mexicana, 1900-1950*, Mexico City, El Colegio de México (1991), p. 220
[373] Lorenzo Meyer, "El primer tramo del camino" in *Historia general de México*, vol. 2, Mexico City, El Colegio de México (1994), p. 1187

claimed to represent the interests of the communities in which they built up their domain during the days of struggle. The latter were the strongmen who emerged at the end of the civil war as the lords of local politics, ready to resort to coercion no less than to largesse as a way to consolidate their political clientele. For this reason, Meyer notes, the Mexican Revolution can also be seen as an endless list of names, "a long list of caciques" with their own place within the new order that emerged at the end of the civil war.[374] For all of them, the Revolution became a source of promise and threat: on the one hand, it made possible the destruction of the power relations that had prevailed in the past, especially thanks to the change in land tenure, which put an end to a property regime which favoured the concentration of land in very few hands. On the other hand, it also made possible the emergence of «agrarismo» or agrarianism as a movement with real political content in the Mexican rural world of the period. At the same time, the quest for political centralisation that in other historical moments held a central place in the political imagination of the country's ruling class soon found a privileged place in the project of the victors of Agua Prieta.

The purpose of this chapter is to locate the process of political modernisation promoted by Álvaro Obregón from 1920 onwards within the framework of the tensions caused by the relationship between a political centre inhabited by the leaders of the Mexican Revolution and a periphery occupied by the representatives of a new local political class that designed their own strategy to cope with the demands hailing from Mexico City. Accordingly, the chapter seeks to highlight the way in which these local actors drew on the old militia traditions that had historically preserved the autonomy of their communities, pointing out that the central government's response to these behaviours would have important consequences for the design of Mexico's internal security architecture in the long term. At the same time, the chapter also seeks to highlight the way in which old militia traditions blended with the new banners of political and ideological struggle raised in the context of the Mexican revolutionary experience, allowing *agraristas* and other groups of armed irregulars to play an important role in the outcome of this process.

[374] "Some of them," adds Meyer, "downright popular and radical, as Felipe Carrillo Puerto, Adalberto Tejeda, Úrsulo Galván, Primo Tapia or Juan M. Banderas. Others, the most, instead would lean more or less quickly towards conservative positions, such as Saturnino Cedillo, the Figueroa brothers, Ángel Flores, Ramón F. Iturbe, Maximino Ávila Camacho, and so many others. Violence allowed most of them to hold military ranks, but there was a civilian minority, such as Emilio Portes Gil, José Guadalupe Zuno or Tomas Garrido Canabal. At any rate, the list can be extended: Domingo Arenas, Guillermo Meixueiro, Cándido Aguilar and hundreds of minor but decisive figures at very local levels." Lorenzo Meyer, "Los caciques: ayer, hoy ¿y mañana?," *Letras Libres* (2000), p. 39

Ultimately, the central government's response to this challenge combined the use of the coercive instruments at its disposal with a determination to dissolve the prerogatives of the militias that had hitherto been used by local governments. This decision, which was sponsored at the highest level of political decision-making, put an end to the possibility of establishing a more balanced institutional architecture in the military sphere: the price the central government paid for neutralising the political force of local militias was the disappearance of the «citizen soldier», understood as a more or less spontaneous product of his or her community of origin. In exchange, the government in Mexico City favoured the establishment of a paid army, not very different in its operation from those that had previously existed under the protection of the hated institution of the forced conscription. In this way, the currents of change that at first had opened unexpected channels on the Mexican social landscape soon found a path that prevailed throughout the Mexican twentieth century: the willingness to resort to the military instrument dependent on the central power to supplement those tasks that in other societies were carried out by local militias or police forces.

The strategic paradoxes of the Mexican modernisation process and the citizens in arms

The set of phenomena referred to in this chapter was not unknown in the early days of the last century: from the sixteenth century onwards, the term «cacique» had been used in Mexico to refer to the figure of those actors capable of exerting over the Indian communities a power (*una potestad*) that was recognised by the central powers.[375] In this way, the early establishment of the institution of the *cacicazgo* structured many of the power relations within the kingdom of New Spain, allowing the authority of the Crown to be recognised at the local level thanks to the mediation of actors invested with their own legitimacy in each of their communities.[376] However, in the context of the process of political transformation that the country underwent from the end of the eighteenth century, the transition to a new republican modernity provoked a semantic shift of the term: the disappearance of the corporations created under the protection of the *ancien régime* allowed the figure of the cacique to be associated with the misuse of political power, but also with the demand to take part from the local level in the process of building the modern state

[375] Guillermo Zermeño, "Cacique, caciquismo, caudillismo" in *Historias Conceptuales*, Mexico City, El Colegio de México (2017), pp. 401-33
[376] Ibid., p. 403

in Mexico.[377] As a result, in the middle of the following century, the term «caciquismo» emerged in Mexico to refer to those relations of local domination defined by a new circumstance: the existence of bosses willing to exploit the ties they had established with their communities in order to negotiate their position with the central power.[378]

In contrast, the figure of the «caudillo» is an invention related to the decision to establish permanent army corps in the country at the end of the eighteenth century: in a short time, notables wishing to take part in the public life of the kingdom enlisted in the ranks of the provincial militias and the army corps created in the capital to enjoy the prerogatives that these corporations conferred on them when they acceded to the status of officers. Once the Revolution of Independence had begun, this circumstance allowed many of these officers to conquer a legitimacy that had been unknown in Mexico until then: the one derived from the merits achieved on the battlefield.[379] So, as John Lynch explains, if the *cacique* is originally a figure of the *ancien régime*, the Ibero-American *caudillo* is in fact a product of nineteenth-century modernity: born in a weak State, the caudillo was an actor called upon to fill the power vacuums produced by a politically incomplete or deficient institutional architecture.[380] Yet, the caudillo's arrival on the scene of national politics rarely helped to fill these gaps: rather, it was a fundamental expression of the political instability that reigned in the country for much of the nineteenth century.

However, the determination to transit towards modernity in order to build a strong State has also been one of the constants of Mexico's historical experience. In this context, the figure of statesmen such as Porfirio Díaz or Álvaro Obregón departs from the previously observed pattern. Although they were undoubtedly military caudillos who originally built a power base on the merit of their deeds of arms, they were also leaders convinced of the need to behave in a strategic manner in order to translate their actions into lasting political effects: capable of adapting to the circumstances of a changing strategic landscape, as Isaiah Berlin's foxes would have done, they were also great hedgehogs committed to a central vision for the future of the Mexican state.[381]

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[377] Ibid., pp. 411-12
[378] Paul Gillingham, "Military *Caciquismo* in the PRIísta State: General Mange's Command in Veracruz" in Ben Fallaw and Terry Rugeley (eds.), *Forced Marches*, Tucson, The University of Arizona Press (2012), pp. 210-37
[379] En efecto, apunta Zermeño, el caudillo es aquel que manda por la vía de las armas: una cabeza que manda y es seguida. Zermeño, Op. cit., p. 422
[380] John Lynch, *Caudillos en Hispanoamérica, 1800-1850*, Madrid, Mapfre (1993), p. 26
[381] Isaiah Berlin, The Hedgehog and the Fox, Princeton, Pricenton University Press (2013), pp. 1-5

In addition, this vision was also illuminated by a clearly discernible ideological orientation. If in other societies the caudillos were to a large extent the instrument of the ruling classes, the fact is that in the Mexican case this circumstance must be qualified: as far as Porfirio Díaz's case is concerned, the popular liberalism that was espoused by the supporters of the Republic from the 1850s onwards occupied a central place in the framework of the modernisation process that his administration led since 1876.[382] As for Obregón, the epic of the Mexican Revolution became a central point of reference in the national reconstruction agenda that his administration promoted from 1920 onwards.[383] In this way, the new Caudillo embraced an aspiration of a higher political order to which Carranza himself had been no stranger: the certainty of being living in a new historical era, opened up by the revolutionary experience that the country experienced after 1910.

Nevertheless, the truth is that the demands of the present were concrete and pressing. For the new ruling group headed by Obregón, the survival of the revolutionary state became the most urgent and immediate task. In this context, the expectations of political centralisation created by the revolutionary government in Mexico City soon triggered new tensions with those who, at the local level, wanted to resort to the country's militia traditions in order to safeguard their interests. An immediate historical precedent cast a notable shadow over all the protagonists of this story: the process of reform and modernisation that the Federal Army had undergone in the first decade of the twentieth century.

The call to integrate the Second Reserve: General Reyes and the quest for an army of citizens

"To be respected, nations need to be strong," wrote General Francisco L. Urquizo in December 1915, precisely when the future of Mexico was still open to all possibilities.[384] To have a professional army was, according to Urquizo, the necessary precondition to achieve that purpose. For the Constitutionalist general the army created by the First Chief was "called to make Mexico a great power." However, for that to really happen, it was first necessary to transform the Constitutionalist forces into a national army: let us put good will on our part, concluded Urquizo,

[382] Paul Garner, "Las bases políticas del México porfiriano: Liberalismo, caudillismo, y la lucha patriótica, 1855-1867" in Op. cit., pp. 47-85
[383] Pedro Castro, "Álvaro Obregón, el último caudillo," *Polis*, vol. 2, no. 3 (2004), pp. 209-29
[384] Francisco L. Urquizo, "El Ejército," *Marte*, vol. 1, no. 1 (1915), p. 11

"and in a short number of years a worthy and strong National Army will be able to alternate with those of the rest of the world." [385] Unfortunately for Urquizo, the task of creating that army no longer fell into his hands: his loyalty to President Carranza, shared by other notable figures such as Generals Francisco Murguía and Cándido Aguilar, separated him from major national decisions after the triumph of the Agua Prieta rebellion.

Born in Coahuila, Urquizo shared with Carranza the same type of political and ideological concerns that led the former to break with the central government after the February 1913 coup. Later, Urquizo actively collaborated in the President's military policy: as Chief of the Department of General Staff of the Ministry of War and Navy, from April 1916 he led the efforts to establish the new National Army that his pen had evoked just a few months before in the port of Veracruz. [386] As the First Chief himself, Urquizo belonged to the group of «armed citizens» who answered to the call of the Maderista revolution in 1910. No less relevant is the fact that all of them were part of a generation that witnessed with special interest the reform efforts promoted by General Bernardo Reyes during the brief period of time in which he headed the Ministry of War at the beginning of the century.

In effect, in January 1900, General Bernardo Reyes, one of President Díaz's closest collaborators, assumed the leadership of the Ministry of War and Navy with the aim of making possible the definitive modernisation of the Federal Army.[387] From that moment, the possibility of replacing the hated system of forced conscription that prevailed in Mexico with a voluntary recruitment model was presented as the first step towards the establishment of an army of citizen soldiers.[388] With the consent of General Díaz, the energetic Minister of War established the Second Reserve of the

[385] Loc. cit.

[386] Arturo Olguín, "Semblanza" in Juan Manuel Urquizo (coord.), *Francisco L. Urquizo: Vida y obra*, Mexico City, Instituto Nacional de Estudios Históricos de las Revoluciones de México (2017), p. 21

[387] Like many of the most prominent personalities of his generation, from the 1880s on Reyes assumed an important role in the construction of the Porfirian State: first as governor of Nuevo León (1885-1900, 1902-1909) and later as Minister of War and Navy (1900-1902). As an ideologue, Reyes shared with Justo Sierra the conviction that the regime headed by Porfirio Díaz had created in Mexico conditions of national progress that would allow for a definitive modernisation of the National Army. Benjamín Flores Hernández, "Las letras y las armas en la obra *México: Su evolución social*," *Estudios de Historia Moderna y Contemporánea de México*, vol. ix, no. 9 (1983), pp. 35-95. Cf. with Bernardo Reyes, *El Ejército Mexicano*, Barcelona, J. Ballesca y Ca. (1901), pp. 76

[388] Marco Enrique Sánchez López, *Una iniciativa reyista en la historia mexicana: La Segunda Reserva del Ejército Nacional; su historia, alcance y consecuencias, 1901-1914*, Master of Arts Thesis, Mexico City, Instituto Mora (2016), pp. 121

Army, made up entirely of citizens who received military training following the model of the reserve armies of the European powers, of which Prussia was the immediate reference.[389]

Politically, Reyes' model was not innocent: behind the project was the desire to re-establish a militia tradition that in Mexico found its most important exponent in the institution of the National Guard. The latter was created within the context of a serious national emergency: the War of 1847 against the United States, a conflict in which an unprepared line army was unable to defend the Republic from the American invaders.[390] From then on, the National Guard became the institutional space that made it possible to reconcile the practices of an increasingly widespread «popular liberalism» with the demand to mobilize the nation to confront its enemies. As a result, the Mexican republican principles found a concrete representation in this new politico-military project.[391] Significantly, Alicia Hernández Chávez points out, the revolutionary experience of France in 1848 reminded Mexican leaders of the period that a well-formed National Guard could be "a counterweight to a strong central army and militarism." [392]

In the decades that followed, the new institution also endorsed the federal character of the Mexican constitutional pact, recognizing with particular insistence the importance of the local level of government. It was for this reason that at the time each state had its own National Guard corps, to the point that in the second half of the nineteenth century the National Guard became "the basic centre for the reorganisation of state, regional and national life" in Mexico.[393] Consequently, under

[389] The Prussian model, Sánchez López points out, was studied by the Mexican general Rafael Benavides, who in 1873 published a specific work on the subject. Ibid. Sánchez López, pp. 19-20. Reyes also paid attention to that referent in a work published in 1885, where he also pointed out that the establishment of a "compulsory personal military service" was a necessary step to advance the army's modernisation. Bernardo Reyes, *Ensayo sobre un nuevo sistema de reclutamiento para el Ejército y organización de la Guardia Nacional*, San Luis Potosí, Imprenta de Dávalos (1885), pp. 29-36. The work of Benavides to which Sánchez López refers is *La Prusia militar*, Nueva York, Hallet & Breen (1873), pp. 704. As for the liberal roots of the institution of the «Landwehr» in Germany, which the Mexicans undoubtedly had in mind, consult Peter H. Wilson, "Landwehr" in Gordon Martel and Frank Tallett (eds.), *The Encyclopedia of War*, Hoboken, Wiley-Blackwell (2012), pp. 1-3

[390] Alicia Hernández Chávez, "Origen y ocaso del ejército porfiriano," *Historia Mexicana*, vol. 39, no. 1 (1989), pp. 265-70; Luis Medina Peña, "El efecto político de la guerra de 1847" in *Invención del Sistema Político Mexicano*, Mexico City, Fondo de Cultura Económica (2007), p. 423; Peter Guardino, "Incluso los padres de familia" in *La marcha fúnebre: Una historia de la guerra entre México y Estados Unidos*, Mexico City, Grano de Sal (2018), pp. 189-99; Pedro Santoni, "'The Powerful Element That Would Certainly Have Saved US': Debating the Revitalization of the National Guard in Mexico" in Pedro Santoni & Will Fowler, *México, 1848-1853*, New York, Routledge (2019), pp. 72-114

[391] "La guardia nacional, matriz del sistema político" in Ibid. Medina Peña, pp. 425-453

[392] Hernández Chávez, Op. cit., p. 267

[393] Ibid., pp. 265-66

the circumstances that prevailed during that period, the call to integrate the different bodies of the National Guard gave local communities a way to actively participate in the process of national construction that the country lived through since the decade of 1850, thus collaborating in the consolidation of a republican order in Mexico.[394] If the ideal of the «citizen soldier» ever existed in Mexico, it was precisely then, when the National Guard created a space for political socialisation for militiamen that would have been inconceivable in a society that lacked other spaces for formal political organisation.[395]

Because of this, for the generation of political leaders who led the Constitutionalist Movement, the experience of the National Guard was not a strange one. Perhaps for this reason, the process of political centralisation that began under the regime of General Porfirio Díaz (1876-1911) was considered an affront by many of them. In those years, the demand to consolidate the political authority of Mexico City put that Mexican tradition on hold: from the 1880s on the National Guard corps were demobilised as part of an exercise in reorganisation of the structures of the State that privileged the existence of a permanent army, which at the time did not exceed a total of 30 thousand troops.[396] Headed by a corps of professional officers graduated from the Military College, this army became a central tool for the consolidation of the modern State in Mexico but, at the same time, it was never able to resolve the contradictions created by the persistence of the forced recruitment system and the division of its forces into auxiliary and permanent troops. As in the societies of *ancien régime*, in Mexico at the end of the nineteenth century the bulk of the permanent army was still made up of forced soldiers who showed little willingness to support the government's

[394] Medina Peña, Op. cit., p. 431

[395] Following the work of Morris Janowitz and other scholars, Raphael S. Cohen has recently pointed out that the notion of «citizen soldier» can be defined by four central features: 1) the existence of compulsory military service, understood as a citizen duty, 2) the universality of this service, which concerns the nation as a whole and not a specific segment of the population, 3) its democratic legitimacy, translated into broad popular support, and 4) the consideration that those who take part in this service are first civilians and then soldiers. Raphael S. Cohen, *Demystifying the Citizen Soldier*, Santa Monica, RAND Corporation (2015), p. 6. "One might argue that the concept of the citizen-soldier embraces military service as a rite of passage by which one both learns and earns citizenship," pointed out Eliot A. Cohen in a work especially devoted to this very issue. However, he latter adds: "In the liberal state, a man is a citizen prior to military service, not because of it." Eliot A. Cohen, *Citizens and Soldiers*, Ithaca, Cornell University Press (1985), pp. 122-23. As for the thesis that the National Guard created a new space for political articulation in nineteenth-century Mexico, see Medina Peña, Ibid., pp. 425-52

[396] Stephen B. Neufeld, "Breaking Ranks: The Army's Place in Making Mexico" in *The Blood Contingent*, Albuquerque, University of New Mexico Press (2017), pp. 1-27. The estimate of the size of the army in this period is developed by Hernández Chávez in Op. cit., pp. 261-63

cause. For this reason, desertion in times of war was a permanent concern for the constituted authorities.[397] No less significant was the fact that the dissolution of the National Guard corps was accompanied by a process of degradation of civic life that closed important political representation spaces for those middle sectors of Porfirian society interested in translating the benefits of material progress of the time in a broader participation in the country's public life.[398]

To a large extent, the call to establish the Second Reserve sought to address these contradictions. The need to create a new recruitment system to put an end to the forced levy was an issue that had already preoccupied General Reyes in 1885: from his perspective, the creation of a mandatory personal military service would make it possible to make up for this deficiency, training citizens that later would be incorporated as reservist in the units of the National Guard.[399] "A total of 40, 000 educated men would present us very soon that National Guard, to be placed at the rear of the 30, 000 soldiers of the permanent Army," Reyes estimated then.[400] By 1900, the general was clear that the men who could be summoned to the service of arms would have to be grouped in the Second Reserve, since the First was made up of other State security bodies.[401] Under the new system, Mexico could mobilize 76,000 men in 45 days, "three times what the Army could have until before the creation of the Second Reserve." Since the soldiers in the reserves were not a completely reliable group, to command them "a new officer group of volunteer citizens would be created."[402] This initiative also sought to answer to one of the central demands of the trinitarian war paradigm: to generate an agreement between the population and the government in order to put the citizens of the Republic on a warpath; citizens that until then were reluctant to voluntarily take part in such

[397] "Recruiting the Servants of the Nation" in Neufeld, Ibid., pp. 27-62

[398] Marco Enrique Sánchez López, "Una propuesta reyista para la juventud del país: La Segunda Reserva del Ejército Nacional en el Distrito Federal, 1900-1902," *Legajos*, no. 4 (2014), p. 38

[399] The latter would in turn be divided into two modalities: the mobile National Guard and the reserve one. Regarding the civic value of the measure, Reyes pointed out: "The mandatory military service is undoubtedly the most appropriate for a people that is governed by democratic institutions, because that system distributes to all nationals the burden that in Mexico has only been placed on the shoulders of the underprivileged until today." Reyes, Op. cit., *Ensayo sobre un nuevo sistema de reclutamiento…*, p. 34

[400] Loc. cit.

[401] In this way, the First Reserve was made up of the police forces of each of the states, the rural cavalry corps (dependent on the Ministry of the Interior) and the fiscal gendarmeries (dependent on the Ministry of Finance). Formally, the National Guard units on active duty in each state were also part of the First Reserve. In contrast, all members of the National Guard in assembly mode were part of the Second Reserve. Reyes, *El Ejército Mexicano…*, Op. cit., p. 74

[402] Sánchez López, Op. cit., "Una propuesta reyista…", pp. 36-37

undertaking.[403] In this way, with the creation of the Second Reserve, the country would soon have the advantages of any reserve army: a body made up of civilians trained in the exercise of arms that would only be summoned in an emergency to defend Mexico from its external enemies.

The dissolution of the new militia model: a missed opportunity at the beginning of the century

Under the initiative of General Reyes, on October 31, 1900, the Mexican government issued a new Organic Law of the National Army that gave legal support to the reorganisation process of the army. By virtue of the new legislation, the Second Reserve was conceived as a main military force arranged as a militia, to be "managed by the state governments, but ready to obey the direct orders of the Ministry of War if required." In reality, the initiative was imagined as a compromise solution that creatively addressed the contradictions generated under the political centralization process promoted by the Porfirian regime: on the one hand, it recognised the possibility that the states could organise their own military contingents, but at the same time, it confirmed Mexico City's authority by foreseeing the creation of a special class of officers "who would respond directly to the command of the Ministry of War, and who would be in charge of commanding these militias."[404] On the other hand, it was an initiative that in fact was presented as an antidote to the excesses of Mexican militarism:

> The Second Reserve called on the citizens to enlist in its ranks and with this promoted an anti-praetorian discourse: it spoke of a nation where there should be a single army, with the same instruction, made up of all its useful inhabitants, solidly educated for military life and always regimented.[405]

It was therefore a civilian counterweight to the prominence exercised until then by the officers who graduated from the Military College. Three decades later, Alfonso Reyes summarized in a few words what were the general purposes of the initiative promoted by his father:

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[403] Luis Ignacio Sánchez Rojas, "La educación en el ejército porfiriano, 1900-1910," *Tzintzun*, no. 54 (2011), pp. 93-127

[404] Sánchez López, Op. cit., p. 12

[405] "La segunda reserva hacía un llamado a la ciudadanía a enrolarse en sus filas y con esto promovía un discurso anti-pretoriano: hablaba de una nación en donde debería de existir un solo ejército, con igual instrucción, formado por todos sus habitantes útiles, educados sólidamente para la vida militar y siempre regimentado." Ibid., p. 15

> The establishment of a voluntary military service, the uprooting of the people to Sunday vices in order to turn them, by spontaneous enthusiasm, into the fields of manoeuvres; preparing a collective discipline that would have been the natural path of democracy; reconciling the army with the highest social aspirations of that time; sowing confidence in the country when the fashion was scepticism; opening the doors to hope for a better era.[406]

Perhaps for this reason, the call to integrate the Second Reserve was directed to the urban middle classes of the country, until then little interested in taking part in this kind of initiatives. Its success was immediate, since the new reserve force "presented itself as an institution that could give voice and prestige to the volunteers who formed it."[407]

As had been the case in the mid-eighteenth century, the call to create such a corps of armed volunteers was greeted with enthusiasm among the notables and the urban middle classes, eager to take an active part in the public life of the country. Reservist clubs, in which young professional and university students took part, were soon created, and in Mexico City they enjoyed the enthusiastic support of professors from the National School of Jurisprudence and other schools of advanced studies.[408] Thousands of reservists came on a weekend basis to receive military instruction in the new training centres created for this purpose in the country's large urban centres, enjoying the social recognition that their incorporation in the army as reserve officers gave them.[409] In a short number of years, an encouraging civic spirit took hold of the militiamen, who in their weekly encounters discovered new reasons to get involved in Mexico's public life. Prominent members of the political class and the business community took part in the experiment: among them were the younger brother of the Secretary of the Treasury, Julio M. Limantour, and the older son of the Secretary of War, Rodolfo Reyes. These figures were joined by prominent artists and

[406] "El instaurar un servicio militar voluntario, el arrancar al pueblo a los vicios domingueros para volcarlo, por espontáneo entusiasmo, en los campos de maniobras; el preparar una disciplina colectiva que hubiera sido el camino natural de la democracia; el conciliar al ejército con las más altas aspiraciones sociales de aquel tiempo; el sembrar confianza en el país cuando la moda era el escepticismo; el abrir las puertas a la esperanza de una era mejor." Alfonso Reyes, *Oración del 9 de febrero*, Mexico City, Ediciones Era (2013), p. 13. According to its author, the original manuscript was completed in Buenos Aires on February 9, 1930.
[407] Op. cit. Sánchez López, "Una propuesta reyista…", p. 39
[408] Sánchez López, Op. cit., p. 42
[409] It is difficult to estimate the total number of reservists mobilised between 1901 and 1902, because existing records are incomplete or unreliable. According to press sources close to the regime, a total of 16, 000 reservists took part in the national holiday parade on September 16, 1902.Ibid., p. 43

intellectuals and even some declared enemies of the regime, such as Enrique Flores Magón.[410] In the capital, the son of a citizen soldier who served under the flags of the Coahuila National Guard enlisted in the Second Reserve, thinking that perhaps the experience could be a reference for the future: his name was Venustiano Carranza.[411]

Be that as it may, the truth is that the political implications of the project did not go unnoticed in the National Palace: The Second Reserve, made up of more than 20 thousand armed citizens, had been created thanks to the leadership exercised by General Bernardo Reyes at the head of the Ministry of War. "Through it, Reyes was able to coordinate in a short time in all the states of the Republic more citizens than any other politician, including the President." [412] Considered by many to be an ideal candidate to succeed General Díaz in the presidency of the Republic, Reyes thus became a threat to the stability of the regime. At the same time, his success also endangered the influence exerted on the government by the "scientists" (*científicos*), a political group headed by José Yves Limantour, the influential Secretary of the Treasury who from 1893 made possible the insertion of Mexico in the circuits of the *fin de siècle* global economy.[413] In a way, the dispute between the elite group to which Limantour belonged and the middle-class citizens who supported Reyes anticipated the kinds of controversies that would face Mexican civilians and military throughout the first decades of the twentieth century.

In any case, Porfirio Díaz considered that the political challenge posed by Reyes was unacceptable and from 1902 he proceeded to dismantle the reserve system created by his former Minister of War.[414] The decision had especially serious consequences for the regime because the break with the political actors who had supported Reyes cancelled the possibility of achieving a gradual reform of the political order built in Mexico since 1876. Indeed, Hernández Chávez points out, the Second Reserve became "the last attempt to organise, from the State, the powerful provincial elites in the old-fashioned way of the National Guard." For this reason, once this alternative was closed, "the

[410] Ibid., pp. 46-48
[411] In effect, Jesús Carranza had been a colonel in the National Guard during the Three-Year War. On his part, his son, Venustiano, was 33 years old when he came to the call of the Second Reserve. Loc. cit. Sánchez López; Hernández Chávez, Op. cit., p. 270
[412] Hernández Chávez, Ibid., p. 283
[413] Loc. cit.
[414] The section of the Organic Law of the Army relating to reserves was repealed in April 1904. Sánchez Andrés, Op. cit., "Una propuesta reyista…", p. 56

way was opened for an autonomous civil organization" that crystallized in the type of political opposition that the government of General Díaz faced with particular intensity after 1908. In fact, what happened after 1910 in the country cannot be understood without paying attention to that reference: Ultimately, "Maderism received as an inheritance a long tradition of local political organization, whose basic characteristics come from the National Guard."[415] Likewise, Carranza's response to the coup d'état of 1913 cannot be understood without his adherence to a tradition in which the «armed citizens» held a leading place in the public life of Mexico.

The new revolutionary reality, the agrarian question, and the end of the «armed citizens»

At the beginning of the third decade of the twentieth century, the circumstances of Mexico were entirely different from those that the country had experienced in 1900, when the reform of the old order still seemed possible. After the collapse of the institutions of the past, among which the line army held a prominent place, the new order still faced the challenge of taming the armed contingents that had made its existence possible. The fall of Carranza expressed the fragility of the historical moment. On the other hand, the revolutionary passions that Mexico experienced since 1910 gave a leading role to problems that the political class of the Porfiriato relegated to the background: in a predominantly rural country the agrarian question became a central issue of the new public agenda. For this reason, to the peasants who took part in the civil war the need to accelerate the distribution of land promised by the program of the Revolution was urgent: If in the first days of the century it had been the urban middle classes that had sought to form part of the Second Reserve, at the beginning of the 1920s the initiative to form new contingents of armed citizens was left in the hands of the *agraristas*, who were reluctant to relinquish the conquests already achieved in previous years.

In Mexico City, former Zapata collaborators such as Antonio Díaz Soto y Gama and Gildardo Magaña made possible in 1918 the creation of a National Agrarian Party, a party that made constant efforts to exert a direct influence over the federal authorities in all that concerned the agrarian reform process throughout the country.[416] Yet, the debate about the best way to proceed

[415] Hernández Chávez, Op. cit., pp. 285-87
[416] Pedro Castro, "Antonio Díaz Soto y Gama y las vicisitudes del Partido Nacional Agrarista," *Iztapalapa*, no. 50 (2001), pp. 379-408

in relation to the scope of the agrarian reform quickly became a central issue in the construction of the new State: at first, the aspiration of the Mexican revolutionaries was to dissolve the large agricultural properties in order to allow the establishment of small rural property, considering that communal land tenure was only a temporary solution to the agrarian question.[417] By virtue of the provisions of the 1917 Constitution, the federal states received broad powers to favour agrarian distribution, especially with regard to the confiscation of farms and agricultural enterprises. In this way, the state governments gained considerable political power that formally militated against the process of centralization of political authority envisaged from Mexico City.[418]

For Obregón, therefore, the dilemma was clear: leaving agrarian reform in the hands of the federated states was tantamount to weakening the authority of the central government, and so he went on the offensive in political and legislative terms with the support of the National Agrarian Party in Congress. At the same time, the President had to deal with the defence of property rights by private individuals in the judicial realm by resorting to the *amparo*, a Mexican constitutional mechanism designed to protect the rights of individuals against the abuses of public power.[419] As a result, in the summer of 1920, the President sent to Congress an initiative aimed at strengthening the powers of the National Agrarian Commission, to the detriment of the authority previously granted to state governors in this matter.[420] At the same time, the claim to favour small property as an adequate regime to deal with the agrarian question was also viewed with suspicion by the Caudillo. The reason was clear: the adoption of this property regime would grant the peasants a political autonomy that would prevent them from being disciplined by the nascent corporate structures linked to the regime of the Revolution.[421] In contrast, the institution of the «ejido», originally understood as a communal property regime built on the basis of the legal order that preceded the establishment of the liberal Republic in Mexico, became a politically attractive alternative to facilitate the fulfilment of the agrarian distribution from the perspective of the federal government. Under this model, Mexican peasants would be submitted to the tutelage of the State authority, receiving in return the satisfaction of being partners "in a grand national

[417] Eitán Ginzberg, "Renunciar a un ideal revolucionario: el debate en torno a la naturaleza privada y comunal de la reforma agraria mexicana," *Historia Mexicana*, vol. 69, no. 2 (2019), p. 557
[418] Ibid., p. 558
[419] Timothy M. James, *Mexico's Supreme Court: Between Liberal Individual and Revolutionary Social Rights, 1867-1934*, Albuquerque, University of New Mexico Press (2013), pp. 75-88
[420] Ginzberg, Op. cit., pp. 565-66, and 580
[421] Ibid., pp. 584-88

initiative."[422] At the same time, the claim to favour small property as an adequate regime to deal with the agrarian question was also viewed with suspicion by the Caudillo. The reason was clear: the adoption of this property regime would grant the peasants a political autonomy that would prevent them from being disciplined by the nascent corporate structures linked to the regime of the Revolution.[423] In contrast, the institution of the «ejido», originally understood as a communal property regime built on the basis of the legal order that preceded the establishment of the liberal Republic in Mexico, became a politically attractive alternative to facilitate the fulfilment of the agrarian distribution from the perspective of the federal government.[424] Under this model, Mexican peasants would be submitted to the tutelage of the State authority, receiving in return the satisfaction of being partners "in a grand national initiative."[425]

The defiance of governor Adalberto Tejeda and his new Civil Guard

Throughout 1922, points out Pedro Castro, one of the tasks that consumed the attention of General Francisco R. Serrano, Minister of War since February of that year, was to intervene in the political conflicts that arose in many Mexican federal states to prevent the logic of local violence from spilling beyond its immediate limits.[426] The central government, generally inclined to favour the cause of agrarian distribution in some key states, was forced to balance this position against the demands of landowners and other local power groups for whom the support or animosity of the Chiefs of Military Operations appointed by Mexico City was often decisive.[427] After realizing that his legislative initiatives would not always have the favour of a Congress in which the Cooperatist opposition represented a substantial majority, Obregón directly pressured the governors of key states not to carry out the provisions of local legislation aimed at the dismantling of large estates. In many states local executives were constrained to advance in this task, yielding to pressure from Mexico City.[428]

[422] Ibid., p. 587
[423] Ibid., p. 584-88
[424] Ibid., p. 586. Cfr. with Baitenmann, Op. cit., pp. 4-6
[425] Ibid., p. 587
[426] Pedro Castro, *A la sombra de un caudillo: vida y muerte del general Francisco R. Serrano*, Mexico City, Plaza & Janes (2005), pp. 54-57
[427] Ibid., p. 56
[428] Ginzberg, Op. cit., p. 581

However, there were many other states where central government interference met with stubborn resistance. In Veracruz, a Mexican Atlantic state recognised for its proverbial agricultural wealth, industrial dynamism, and vast oil fields, the issue was no less complex: for Governor Adalberto Tejeda (1920-1924) agrarianism was part of a project of a political and ideological nature embraced with conviction.[429] Thus, Colonel Tejeda appealed to a tradition of agrarian struggle that was configured in the Huasteca of Veracruz since the 1850s, at least. In doing so, he won the favour of many of the indigenous communities in the region for his cause. In this way, the governor's political adventure was supported by a group of peasant leaders who from the beginning was formed in that tradition of struggle. [430]

At the same time, the arrival of Tejeda to power in Veracruz cannot be understood without paying attention to the political dynamics that took place in Mexico after the Agua Prieta rebellion. Under Carranza's administration, the state was handed over to the political domination of General Cándido Aguilar, a commander who remained loyal to the president until the end by virtue of his family connections with the President. In contrast, if Colonel Tejeda could display any political merit at the end of the uprising against Carranza, it was that of having worked in concert with General Guadalupe Sánchez to further the Obregonist cause in Veracruz through armed means. [431] Ratified by Obregón as Chief of Military Operations in the days that followed Carranza's fall, General Sánchez immediately assumed tasks that reveal the nature of the political moment: after proposing to the President a shortlist of candidates to occupy the governorship of the state of Veracruz in an interim mode, the man who was finally selected by Obregón did not protest before the local legislature, but before the Chief of Military Operations. The appointment, Romana Falcón concludes, was an agreement "between those who formally had nothing to say: the caudillo and the military chief. Mexico, therefore, was not yet governed by the formal channels of power." [432] Finally, and knowing that he had the favour of Obregón, in December 1920 Colonel Adalberto Tejeda formally assumed the state's governorship.[433]

[429] Romana Falcón and Soledad García, *La semilla en el surco: Adalberto Tejeda y el radicalismo en Veracruz 1883-1960*, Mexico City, El Colegio de México (1986), p. 72
[430] Ibid., p. 72
[431] Ibid., pp. 102-107
[432] Ibid., p. 110
[433] Ibid., p. 119

Once in power, the new governor discovered that he had a meagre political force to fulfil the purposes of the agrarian reform agenda in Veracruz: the attempt to advance in the land distribution program immediately collided with the opposition of powerful interest groups that received the support of the Chief of Military Operations in the state. To reduce the latter's political influence, Tejeda made the decision to remove from key positions all those local officials loyal to General Sánchez. In a short time 45 mayors were removed, being replaced in the municipal government by Civil Administration Boards appointed by the state government.[434] At the same time, the governor also understood that to confront Sánchez's power he would have to resort to his own military means. Since the 1917 Constitution punctually preserved the legal framework that gave the states the possibility of organising their own armed corps under the figure of the National Guard, Colonel Tejeda was able to resort to this militia tradition to strengthen the «Civil Guard» of the state, an armed institution created when Cándido Aguilar was still in charge of the local government.[435] However, the content that Tejeda gave to his Civil Guard gradually departed from the referent built around the armed citizens who took part in the great deeds of the Mexican nineteenth century: under Tejeda the Civil Guard became a vehicle that allowed to articulate the demands of the Veracruz *agraristas*, granting them an armed wing that made possible their political organisation.[436]

In fact, it was the peasant leaders themselves who suggested the governor to deploy the Civil Guard in order to protect those rural districts in which the communities had clashed with armed enforcers

[434] Ibid., p. 126

[435] Strictly speaking, these voices refer to two different institutions: in accordance with the provisions of Section XX of Article 87 of the local Constitution, adopted by the Legislature of the State of Veracruz in September 1917, it was the Governor's responsibility to "organize and discipline the National Guard and the other forces of the State and to exercise, with respect to both, the command and the other attributions granted by the General Constitution." However, in Section XLI of Article 68 of the same ordinance it is read that it is the Legislature's faculty to approve the provisions issued by the State Executive "in relation to the organisation, discipline and functions of the Civil Guard or State Security," this being the only moment in which that body is mentioned by the local constitutional text. In contrast, the references to the National Guard are explicit in other sections of the document: thus, for example, the old militia tradition is clearly endorsed in Section XXV of the aforementioned article, where it is read that the State Assembly has the powers to decree "the way to cover the contingent of men that the State must give to the Army of the Nation and issue regulations for the instruction of the National Guard, subject to Section XV of Article 73 of the General Constitution." *Constitución Política del Estado Libre y Soberano de Veracruz de 1917*, reproduced in Juan Pablo Salazar Andreu (coord.), *Veracruz y sus constituciones federales (1825-1917)*, Mexico City, Tirant lo Blanch (2015), pp. 166-68, and 173-75

[436] Falcón, Op. cit., p. 127

at the service of those who were opposed to the agrarian reform.[437] At the same time, Tejeda's resolve to advance the land distribution program led him to arm the peasants by resorting to another institution created in Mexico during the most violent years of the civil war: the Social Defences, auxiliary militias conceived to guarantee the security of municipalities and towns against threats such as banditry or armed incursions by insurgents.[438] Originally conceived as self-defence bodies linked to their communities of origin, these units were not always on the side of the agraristas: in other states, points out Hans-Werner Tobler, the «Social Defences» (sometimes also known as Civil Defenses) were a tool at the service of the landed aristocracy.[439] However, in the case of Veracruz, the governor's decision to resort to the Civil Guard in combination with the Social Defences granted him a real base of support to confront the power informally exercised by the Chief of Military Operations, thus creating a tense balance between both actors.[440]

Like so many other generals of the period, Guadalupe Sánchez not only became a spokesperson for the actors with economic interests in the region; he also established highly lucrative businesses by himself that definitely placed him on the side of those opposed to the *agraristas*. [441] Therefore, as Chief of Military Operations Sánchez was able to dispose of the soldiers who were at his command to prevent the land demarcation processes carried out by the Local Agrarian Commission, also arming groups of *pistoleros* (gunmen) and *guardias blancas* (white guards) maintained by landowners.[442] Starting in 1922, the confrontation between the armed contingents linked to Sánchez and the peasants who took part in the agrarian distribution process promoted by

[437] Loc. cit.

[438] In effect, initially the Social Defences were conceived as a counterinsurgency tool to confront Francisco Villa's armed contingents in Chihuahua. The example set by the authorities of that state since 1916 was followed in other states in the following years: at the beginning of the 1920s, units of this type existed in many of the country's most important municipalities. Martha Eva Rocha Islas, *Las Defensas Sociales en Chihuahua: Una paradoja de la Revolución*, Mexico City, Instituto Nacional de Antropología e Historia (1988), pp. 57-86. Regarding the local roots of this class of units, see Alan Knight, "Los municipios, las patrias chicas y la Revolución Mexicana" in *Nación y municipio en México*, Mexico City, Universidad Nacional Autónoma de México (2012), pp. 249-51. Cf. with Alan Knight, "War, Violence and Homicide in Modern Mexico," *Bulletin of Latin American Research*, vol. 32, no. s1 (2013), p. 39

[439] Tobler, Op. cit., p. 50

[440] Falcón, Op. cit., pp. 126-28

[441] Ibid., p. 147

[442] Originally, the last term referred to the groups of informal rural enforcers armed and financed by Mexico's landowners. In contrast, *pistoleros* were said to be mainly an urban phenomenon. Reality was more ambivalent since in many instances a single individual could perform both functions depending on the circumstances. At any rate, both were the product of a reality in which the use of armed violence remained a central resource for conducting local politics. On this issue see Knight, Op. cit., "War, Violence…," pp. 38-44

Tejeda fuelled the flames of a local conflict that again demanded the attention of the federal authorities. President Obregón was ambivalent: although he considered that Tejeda's government program was too radical, the possibility of openly favouring Sánchez was conditioned by the President's suspicion regarding the political loyalties of the general in command of one of the most important military outposts in the country.[443]

Ultimately, Obregón's concern was not unfounded: General Sánchez's closeness to the leaders of the National Cooperatist Party became suspicious from the moment in which that political formation demonstrated that it could be a competitive force, willing to openly contest for the presidency of the Republic.[444] However, the seriousness of the incidents that took place in Veracruz in those years justified the rapprochement between the President and his Chief of Military Operations in the region: since the spring of 1922, the confrontation between the agraristas and the armed groups led by the Veracruz landowners generate particularly serious violent incidents. In October of that year, the land applicants protected by the Executive Committee of the municipality of La Ternera collided with armed elements at the service of an influent landowners' family. Subsequently, the peasant leaders of the area sent a series of letters to President Obregón and other authorities asking that the pistoleros be punished, also demanding the removal of the mayor of Paso de Ovejas.[445]

A year later, on March 9, 1923, the incident was repeated in the municipality of Puente Nacional, where the intervention of the Civil Guard in favour of the peasants led to a confrontation with an armed group at the service of one of the landowners of the region. The incident, which also involved federal soldiers under General Sánchez's command, resulted in a total of eight dead and seven wounded. Tejeda immediately reported the events to federal authorities, but the governor's report immediately contradicted the information that the Chief of Military Operations sent to Mexico City to account for the same incident.[446]

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[443] Falcón, Op. cit., p. 151

[444] Georgette José, "La rebelión Delahuertista: Sus orígenes y consecuencias políticas, económicas, y sociales" in Javier Garciadiego (ed.), *El Ejército Mexicano: 100 años de historia*, Mexico City, El Colegio de México (2014), p. 219

[445] Falcón, Op. cit., p. 151

[446] Soledad García Morales, "Adalberto Tejeda y la intervención federal en la política de Veracruz (1920-1923)," *La palabra y el hombre*, no. 42 (1982), p. 43

The response from Mexico City and its long-term strategic consequences

The response from the federal authorities was immediate: the President ordered the disarmament of the Social Defences and other groups of armed volunteers, stating that the governor of Veracruz should also disband his Civil Guard. At the same time, he instructed for the Public Prosecutor's Office to proceed to investigate events in which the responsibility of the state executive appeared to be evident.[447] In the Congress, the Cooperatist legislators got ready to promote an initiative to remove the governor with the assistance of the Senate, a practice already used in other states in order to restore local governance.[448] Aware of these determinations, Colonel Tejeda resorted to other instances to articulate his defence: on the one hand, he knocked on the doors of the Ministry of the Interior, where General Calles, close to the *agraristas* and the labour movement, found himself willing to listen to him; on the other hand, he appealed to General Heriberto Jara, now Senator of the Republic, to present his cause before the Legislative Power.[449] His approach was calculated, since Tejeda knew that the man Obregón has chosen to succeed him was Plutarco Elías Calles. Still, the reasons that the colonel expressed before Senator Jara are of interest to our topic:

> Tejeda argued that given the de facto preponderance of the military in the political life of the states, the civilian authorities needed support to enforce their provisions, especially when, as was the case in Veracruz, the landowners were provided with weapons by the military and it was not possible to resort to the federal army, as it was the first to raise obstacles against the agrarian reform.[450]

In this way, the governor made a wake-up call that potentially concerned the rest of the states and the need to balance the institutional architecture aimed at safeguarding the internal security of the Mexican State. The Caudillo's position was different: he decided to hold Tejeda responsible for the

[447] Ibid., pp. 44-49
[448] The initiative was promoted by representative Manlio Fabio Altamirano on behalf of the Veracruz Legislative Group in the Congress of the Union. Ibid., p. 44
[449] Loc. cit.
[450] "Tejeda argumentaba que dada la preponderancia que de facto tenían los militares en la vida política de los estados, las autoridades civiles necesitaban de un apoyo para hacer cumplir sus disposiciones, especialmente cuando, como sucedía en Veracruz, los hacendados eran provistos de armas por los militares y no era posible recurrir al ejército federal, por ser éste el primero en levantar obstáculos contra la reforma agraria." Op. cit. Falcón, p. 154

disorders that break out in his state, dismissing the role played by his Chief of Military Operations in exacerbating the local conflict. However, the president never forgot the strategic significance of the port of Veracruz: handing over that position to the Cooperatist was as much as relinquishing to a declared adversary one of the access roads that historically allowed the conquest of the High Plateau or *Altiplano*, Mexico's political heart since the most remote times. [451]

At the same time Obregón did not yield in his determination to disarm the Civil Guard of Veracruz, especially since his decision has also been designed to have a definitive national scope. To achieve this purpose, the president once again concentrated his efforts in the legislative sphere: on March 15, 1923, he sent an initiative to the Congress in order to dissolve all the armed bodies at the service of the state governments, stating that such bodies were no longer needed to ensure law and order in Mexico.[452] In the Chamber, the Caudillo's supporters pointed out that the state forces actually constituted small private armies at the service of regional powers, thus articulating an argument used from then on to undermine the legitimacy of the militia tradition that historically supported the existence of the National Guard in Mexico.[453] In Puebla, Jalisco, and Campeche, the governors acceded to the president's wish, proceeding to demobilise their local militias. Already officially recognized as a candidate for the presidency of the Republic, on March 23, 1923, General Calles also pointed out that these militias were only at the service of the political ambition of the governors.[454]

In the following weeks the issue was discussed on a national scale by the most diverse voices. In the Congress, the initiative aimed at dissolving the security forces belonging to the federal states converged with three main themes: the future of the agrarian movement, the relationship that the political centre of the country should have with local governments, and, finally, the powers of the latter in matters of «public security», a notion that the constitutional text of 1917 incorporated in an ambiguous way.[455] At any rate, the initiative indicated that the command of the local police

[451] Ibid., p. 157
[452] *Excélsior*, 11 March 1923; Cf. with "The Militia Question" in Shawn Louis England, *The curse of Huitzilopochtli: The origins, process, and legacy of Mexico's military reforms, 1920-1946*, PhD Dissertation, Arizona State University (2008), p. 144 and Op. cit. Falcón, p. 157
[453] *El Heraldo de México*, 16 March 1923; England, Ibid., p. 144
[454] England, Ibid., p. 146
[455] The notion of public security is mentioned directly in Article 32 of the 1917 Constitution. Related terms, such as «public order» (*orden público*), «external security» (*seguridad exterior*) and «internal security» (*seguridad interior*) are enunciated in other portions of the constitutional text. In section VI of Article 20 it is noted, for example, that the authorities may proceed to tax goods "for security or police reasons." For its

forces should remain in the hands of the municipal governments, in keeping with the spirit of the provisions of Article 115 of the Constitution. At the same time, the legislators justified the dissolution of the state militias by appealing to the provisions of section II of Article 118, which prescribed that states cannot have "permanent troops or warships" without the consent of the Congress of the Union.[456] But the interpretation of that article was variable: if the militias were made up of reservists, in accordance with the scheme provided by the Constitution itself in relation to the arrangement of the National Guards of each state, then the existence of the latter would not be violating the provisions defined in Article 118. However, that was not the course of interpretation chosen by the legislators close to the President: ultimately his initiative applied "to anybody of state-based armed groups regardless of what they were called: civil constabularies, forces of public safety, rural police for social defence, volunteers, regional forces, etc."[457] Significantly, this position was formulated within the United War and Government Commissions in the last days of April 1923. In the debates that followed, a small number of legislators ruled against the initiative, pointing out that without a coercive power at their disposal governors could not secure obedience in a country still dominated by violence.[458]

Finally, the initiative was approved in general terms on May 7, 1923.[459] A few days earlier, on May 1, the National Agrarian Party convened an Agrarian Congress in which the discussion on the right of peasants to self-defence had a prominent place in the program. The intention of the organisers was clear: to question the scope of the Law on the Suppression of Social Defenses and Civil Guards in order to point out that the final version of the initiative should consider in its articles the right of peasants to own and keep weapons individually.[460] In doing so, the Agrarian Congress delegates sought to counteract one of the most characteristic features of the new revolutionary State: the inclination to disarm its own citizens, especially when they belonged to interest groups considered conflictive or unreliable from Mexico City's perspective. At the Second Congress of Peasants of San Luis Potosí, held in January 1924, one of the delegates proposed that the beneficiaries of the

part, Article 21 defined the competences of the Office of the Public Prosecutor, also making reference to the existence of a "judicial police." As previously noted, Article 89, in its section VI, granted the President the power to dispose of the permanent armed force "for the internal security and external defence of the Federation." Op. cit., *Diario Oficial* (5 February 1917), *passim*.

[456] Ibid., p. 159

[457] England, Op. cit., p. 151

[458] Ibid., pp. 151- 57

[459] Ibid., p. 154

[460] Castro, Op. cit., p. 387

agrarian distribution should actively cooperate in the defence of the revolutionary government, taking part in the organization of three armed contingents: a National Army, Local Forces and Communal Land or "Ejidal" Defences.[461] This way of conceiving the defence structures of the Mexican State, which certainly did not have the endorsement of the Ministry of War, was presented —at least in discursive terms— as an alternative to the determinations made on this matter by the constituted government. In fact, the call to constitute «Local Forces» found its support in the country's old militia tradition:

> The Local Forces, for their part, would be made up of persons willing to abandon their daily occupations to join armed groups, ready to go wherever they were called, within the limits of their state; they would be organized in agreement with the municipal presidents, and they would receive a salary. The so-called Ejidal Defences would not enjoy any emolument and would be honorary: their members would not neglect their normal occupations, but would be ready to collaborate in the defence of their *ejidos* and in the area in which they reside in the event of rebel attacks.[462]

However, the purpose of the agraristas was never to restore the «armed citizens» to their former status as protagonists of the civic life of Mexico. Rather, the initiative had a very limited purpose: to demonstrate that the agrarian movement was in a position to participate in the defence of the new State in an effective way. By 1924 this need was an unavoidable urgency: in December 1923 a new armed uprising put in danger everything achieved by the regime of the Revolution up to that moment. A month later, the National Agrarian Party created a Department of Military Action, thus signalling the determination to arm the working classes to allow the defence of their interests.[463] Among those responsible for the new department was the father of Octavio Paz, a former supporter of Emiliano Zapata.[464]

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[461] Ibid., p. 391

[462] "Las Fuerzas Locales, por su parte, estarían conformadas por personas dispuestas a abandonar sus ocupaciones diarias para integrar grupos armados, prestos a acudir donde se les llamara, dentro de los límites de su estado; estarían organizadas de acuerdo con los presidentes municipales, y recibirían un sueldo. Las llamadas Defensas ejidales no gozarían de emolumento alguno y tendrían el carácter de honorarias: sus miembros no descuidarían sus ocupaciones normales, pero estarían prestos a colaborar en la defensa de sus ejidos y en la zona en que radicaran en caso de ataques rebeldes." Loc. cit.

[463] Ibid., p. 392

[464] Castro, Op. cit., "Los partidos de la Revolución," p. 92

Conclusion

In the years that followed, the tense collaboration between the *agraristas* and the government continued in an unexpected way: by virtue of the war necessities of the period, the armed peasant units were used to face the many contingencies that the national authorities confronted until the late 1930s. Eventually, these contingents would be considered as part of the army reserves, subordinate to the command of the different military zones and regions of the country.[465] In the long term, the solution consisted in formalising what had become a recurring practice since the first days of the civil war: creating small units of armed peasants limited in the scope of their action to the territory of the *ejidos* in which their members lived.[466] Known from 1 January 1929 as the Rural Defence Corps, these units were called upon at various times to collaborate with the regular army in the pursuit of the enemies of the Mexican state, without, however, escaping the proverbial suspicion of the authorities of the existence of armed citizens capable of using force to achieve their own ends.[467] In reality, the margin of action of the latter was to be limited since the existence of the Rural Defence Corps answered to the same process of political centralisation that subordinated the Mexican *ejido* to the needs of a central government jealous of its political authority.

And yet the Caudillo's efforts bore lasting fruit: by renouncing the possibility of having their own armed corps, the state governments were gradually placed at the mercy of military commanders formally under the authority of Mexico City. In the long term, this decision also had a notable influence on the development of law enforcement policy in a political system where criminal matters were of secondary importance: deprived of the possibility of using their own institutional

[465] Martha Beatriz Loyo Camacho, *Joaquín Amaro y el proceso de institucionalización del Ejército Mexicano, 1917-1931*, Mexico City, Miguel Ángel Porrúa (2010), p. 52. Cr. with "Antecedentes Históricos" in *Manual de Organización y Funcionamiento de la Dirección General de Defensas Rurales*, DN M 1500, Mexico City, Secretaría de la Defensa Nacional (2018), pp. 1-6

[466] Mariano Sánchez-Talanquer, "Legacies of Revolution: Popular Militias and the Rule of Law", Working Draft, Harvard Academy for International and Area Studies/Department of Politics CIDE (2018), pp. 13-20

[467] The institutionalisation of these bodies was sanctioned in the Regulations for the Organization and Functioning of Rural Defenses (*Reglamento de Organización y Funcionamiento de las Defensas Rurales*), issued by President Emilio Portes Gil on January 1, 1929. In the decades that followed this provision was supplemented by a series of circulars that defined the mode of organization of these bodies. Those provisions were abrogated by the Instructive for the Organization, Operation and Employment of the Rural Defense Corps (*Instructivo para la Organización, Funcionamiento y Empleo de los Cuerpos de Defensa Rurales*), released on March 21, 1964.

means to deal with local public order problems, governors quickly understood that the possibility of reaching an understanding with the military commanders assigned to their territories by the Federation was vital to their political survival. In many cases, this relationship opened the door to new cacicazgos that persisted until the second half of the last century.[468]

In contrast, the establishment of professional public safety bodies, capable of exercising effective jurisdiction over the territory of the different federal states of Mexico, was considered a second-order requirement: the task that in other societies corresponds to the police in Mexico was granted to an extraordinarily changeable mix of men dedicated to the exercise of violence. The existence of police corporations in the capital of the country, in the state capitals or in the large municipal capitals said little about the informal agreements that made possible the maintenance of social peace in the country during those years.[469] Ultimately, impunity "was less the product of a totalitarian conspiracy tan the result of a system in which multiple players conducted a variety of illegal activities under different sorts of official sponsorship."[470] Thus, the need to discuss the scope of a «public security» (*seguridad pública*) agenda on a national scale only became evident in the last decade of the twentieth century, when the conditions that made possible the maintenance of public order at the end of the Revolution were substituted by a new social reality that made the arrangements of the past untenable.

Thus, while the public security agenda became a secondary issue in Mexico, another no less complex agenda was configured in those years: one that concerns the «interior security» (*seguridad interior*) of a country in which the architects of the military institutions abandoned from the beginning any pretence of projecting force outside its borders.[471] Formally, Mexico did not do without the reserve system instituted before the Revolution, but the new military legislation approved by the Congress in March 1926 no longer included the figure of the National Guard within the scheme, considering that doing so was unnecessary.[472] Since the Constitution of 1917 consigned the existence of that institution in some of its most relevant articles, the decisions

[468] Gillingham, Op. cit., p. 213
[469] On this issue, consult Pablo Piccato, *A History of Infamy: Crime, Truth, and Justice in Mexic*o, Oakland, University of California Press (2017), pp. 107-25, 161-90
[470] Ibid., p. 189
[471] Enrique Plasencia de la Parra, *Historia y organización de las fuerzas armadas en México, 1917-1937*, Mexico City, Universidad Nacional Autónoma de México (2010), pp. 39-40, 144-47, 150
[472] Loyo Camacho, Op. cit., pp. 139-41

adopted in the 1920s in relation to this issue laid the foundations for a particularly ambiguous situation: ultimately the possibility of convening again the National Guard did not disappear within the scheme of Mexican military legislation, even though in fact that possibility was blurred in the face of the political needs of the moment.[473] Five decades later, in 1978, an eminent Mexican jurist still recognised the formal attributes of the National Guard in the following terms:

> The National Guard is a non-professional and non-permanent armed group, which must be integrated in each federal entity under the orders of the governor. Congress must issue the regulations to organize, assemble and discipline it, but its training is the responsibility of the states, and its chiefs and officers will be appointed by the same citizens who compose it.[474]

However, Jorge Carpizo also pointed out that until that moment the Mexican Congress had not legislated on the organisation and regulation of the National Guard "for technical and political reasons" that apparently escaped his consideration.[475] More emphatic, José Manuel Villalpando pointed out ten years later that the legal-practical impossibility "of putting into force the constitutional mandate that gives life to the Guard" was explained thanks to the decision to "strengthen the new Mexican Army through laws and concrete actions," as well as for "the veteranisation of the revolutionary troops," which gave them a permanent and professional character.[476] Regarding the powers of the president in matters of «interior security» —a notion that in the first decades of the twenty-first century fractured the consensus about the pertinence of resorting to the military instrument in order to preserve domestic order— Carpizo concluded: bear in mind that the country has been divided "into military commands, so the army is scattered throughout the republic." "A simple phone call from the President is enough for the army to intervene almost immediately in any part of the country."[477] Four more decades would have to pass

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[473] José Manuel Villalpando, "La evolución histórico-jurídica de la Guardia Nacional en México" in Beatriz Bernal (coord.), *Memoria del IV Congreso de Historia del Derecho Mexicano*, Ciudad de México, Instituto de Investigaciones Jurídicas, 1986, p. 1157-158

[474] "La guardia nacional es un conjunto armado no profesional y no permanente, que se ha de integrar en cada entidad federativa bajo las órdenes del gobernador. El congreso deberá expedir los reglamentos para organizarla, armarla y disciplinarla, pero su enseñanza es competencia de los estados, y sus jefes y oficiales serán nombrados por los mismos ciudadanos que la componen." Jorge Carpizo, "Facultades de nombramiento, declaración de guerra y preservación de la seguridad interior" in *El presidencialismo mexicano*, Mexico City, Siglo XXI Editores (1978), pp. 127-128

[475] Loc. cit.

[476] Villalpando, Op. cit., p. 1158

[477] Carpizo, Op. cit., p. 128

before a Mexican President made the determination to create a new armed body "with the purpose of supporting the ends of public security" using the word «National Guard» to grant renewed legitimacy to such a decision.[478]

In any case, the truth is that the fearsome formula to which Carpizo referred in 1978 was not new: since the times in which Porfirio Díaz began the process of consolidation of the modern State in Mexico, the determination to divide the national territory into multiple military jurisdictions had been part of an exercise aimed at consolidating the central government's authority over an armed contingent that was not always reliable.[479] It should not be forgotten that at the beginning of the third decade of the last century the Revolution had already "ten years of searching for itself."[480] In a country of great needs, the solutions tested by Obregón and his collaborators answered to the logic of the moment. However, the model of military reorganisation chosen by the regime of the Revolution definitively closed the door to the creation of an army made up of citizen reserves, as proposed by the followers of General Reyes at the beginning of the century.

The decision taken was to consolidate a paid army, made up of contract soldiers with no real roots in the communities in which they were deployed.[481] By embracing this model on a national scale, the revolutionary leaders of Mexico also recreated in a short time one of the central features of the strategic culture of the old regime: conceiving the army as an instrument of territorial domination aimed at consolidating the authority of a State still under construction.[482] As a result, in those years the deployment of the army resembled in many ways the behaviour of the occupying forces used by the European colonial empires to keep order in their overseas dominions.[483] In fact, one of the most important institutional lessons of this period was the possibility of waging major counterinsurgency campaigns against adversaries who enjoyed significant popular support in specific portions of the Mexican national territory.

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[478] "Concepto operacional de la Guardia Nacional" in *Plan Nacional de Paz y Seguridad 2018-2024*, Mexico City (2018), p. 21
[479] Matute, Op. cit., pp. 155-56
[480] Reyes, Op. cit., "México en una nuez", p. 179
[481] Luis Medina Peña, "La domesticación del guerrero" in *Hacia el nuevo Estado*, Mexico City, Fondo de Cultura Económica (1995), p. 32
[482] Neufeld, Op. cit., pp. 217-52
[483] Justin Castro, "Porfirian Radio, Imperial Designs, and the Mexican Nation" in *Radio in Revolution*, Lincoln, University of Nebraska Press (2016), pp. 15-44

Chapter 4. Towards the conquest of the present: the 1924 rebellion and its consequences

In January 1923, the poet Manuel Maples Arce pinned a manifesto to the walls of the city of Puebla in which he declared that the possibility of achieving a new art was one of the great tasks of the moment.[484] In effect, moving "towards the future" was one of the war cries of the Estridentista movement with which Maples Arce sought to publicise the ideas of the international avant-garde among young Mexicans of the time.[485] Already by the end of 1921 the poet had posted another proclamation on the walls of Mexico City in which he highlighted the gravitation of the current moment on the life of his country: rather than a quest for the future, the encounter with a world "beautifully lit at the stupendous apex of the present minute." [486] As in Weimar Germany, where the instant represented a moment of rupture in the experience of historical time, in the revolutionary Mexico of those days the conquest of the present appeared as the most urgent task.[487] But in contrast to post-war Germany, dominated by the impact of a military defeat that since 1918 imprinted on consciousness a perception of constant crisis, in Mexico the triumphant revolution gave the social life of the time a new meaning to what was deemed as possible.[488]

Maples Arce understood by then that "explaining the purposes of the renovation is part of a long process" that requires forceful measures. "The strategy that was convenient was that of rapid action and total subversion", he would point out several decades later, echoing ideas that would later be embraced by men like Roberto Bolaño and Guy Debord. [489] According to Luis Mario

[484] Manuel Maples Arce, German List Arzubide, Salvador Gallardo et al., *Manifiesto Estridentista*, Puebla (1 January 1923), p. 1. In relation to the place occupied by manifestos among the artistic avant-garde of the period see Elissa J. Rashkin, "Manifiestos" in *La aventura estridentista*, Mexico City, Fondo de Cultura Económica (2015), pp. 53-88

[485] Maples Arce, Loc. cit. Companions of Maples Arce in the same aesthetic adventure were Ramón Alva de la Canal, Jean Charlo, Fermín Revueltas, and Arqueles Vela, in addition to the already mentioned Gallardo and List Arzubide. Elissa Rashkin and Cala Zurían, "The Estridentista Movement in Mexico: A Poetics of the Ephemeral" in Mariana Aguirre et al., *International Yearbook of Futurism Studies*, special issue, Futurism in Latin America, vol. 7 (2017), pp. 309-10

[486] Manuel Maples Arce, *Actual. Hoja de Vanguardia*, no. 1, Mexico City (31 December 1921), p. 2. In fact, Rashkin points out, this fascination with the present moment, in which the individual experience of each human being overcomes the dominance of machines, is one of the aspects that most clearly differentiates Mexican Estridentismo from Italian Futurism. Rashkin in Op. cit. *La aventura estridentista*, p. 61

[487] Humberto Beck, "Introduction" in *The Moment of Rupture: Historical Consciousness in Interwar German Thought*, Philadelphia, University of Pennsylvania Press (2019), pp. 1-21

[488] Ibid., pp. 2-4

[489] Luis Mario Schneider, *El estridentismo o una literatura de la estrategia*, PhD Dissertation, Mexico City, Universidad Nacional Autónoma de México, Facultad de Filosofía y Letras (1968), p. 37

Schneider, Maples Arce's aesthetic intuition quickly led him to integrate the flags of the Mexican Revolution into the Estridentista program in order to emancipate the country from its old intellectual ties. [490] As supporters of the revolution, notes Elissa Rashkin, Estridentistas "not only aspired to be poets, they were also agile propagandists, immersed in the language of advertising and consumer capitalism, determined to use these new tools to overthrow the old literary regime."[491] Self-proclaimed representatives of the artistic avant-gardes of the time, Estridentistas also embraced the logic of the instantaneous: they were the «actualists» willing to build on the basis of the immediate.[492] In any case, the truth is that Maples Arce's fascination with the avant-garde did not escape the military origin of the term. As Humberto Beck has rightly pointed out, "to belong to the avant-garde of an army (or of a culture or a society) is to be ahead of the rest, the first traveller to unmapped regions of reality."[493] In that sense, the Mexican Estridentistas were not very different from their European peers of the time: Estridentismo, its main poetic director once concluded, "is a reason of strategy." [494]

However, at the beginning of the 1920s, the vanguard of the Mexican Revolution was not in the hands of this small group of poets, but in those of the men who backed the political enterprise of the victors of Agua Prieta. Like the poets led by Maples Arce, this group of officials, soldiers and intellectuals were convinced that Mexico's most urgent task was the conquest of the present.[495] Building a solid revolutionary state, forging its institutions, broadening the scope of its policies and definitively containing its enemies are tasks that loom large on the horizon of expectations of the leaders of a society burdened by the need to confront a series of problems that could no longer be postponed. A central issue of concern for them was the aspiration to effectively assert the authority of Mexico City over the entire national territory. No less important was to establish a new dialogue with the international community aimed at ending the isolation that the country had experienced at the end of the great civil war of 1910. The achievement of these two aims was complementary: ensuring stability at home was essential to gain recognition abroad; at the same time, the

[490] Ibid., pp. 69-70
[491] Rashkin, Op. cit., p. 79
[492] Beck, Op. cit., p. 46
[493] Ibid., p. 48
[494] Manuel Maples Arce quoted by Schneider in Op. cit., p. 73
[495] Luis Gonzáles, "Los 300 cachorros de la Revolución" en *Historia de la Revolución Mexicana*, vol. 14, Mexico City, El Colegio de México (1979), pp. 143-184. Cf. with Carlos Monsiváis, "Notas sobre la cultura mexicana en el siglo XX" en *Historia general de México*, Mexico City, El Colegio de México (2008), pp. 977-93

possibility of gaining that recognition was a necessary prerequisite for accessing the credit that would be used in the process of national reconstruction. In this context, the grand-strategic behaviour of General Obregón's government was conditioned by the need to balance the use of the different instruments at the disposal of the new Mexican revolutionary State to achieve this dual task.

The purpose of this chapter is to recount the tensions created by that double bet within the ruling group headed by Obregón, so as to understand the way in which the government of the Revolution answered the challenge of the Delahuertista Rebellion from December 1923 onwards. In this way, the chapter begins with a recapitulation of the engagement process with the outside world that began under Adolfo de la Huerta (1920), the former governor of Sonora who took over the reins of the national government at the end of the Aguaprieta Rebellion. Thanks to the diplomatic good offices of his administration, the government of the Revolution was able to lay the foundations for a complex negotiation process guided by the demand to re-establish Mexican credit in the United States and Europe. Once in power, Álvaro Obregón entrusted De la Huerta himself to carry this process to its ultimate consequences in order to secure diplomatic recognition for the Mexican government among the great powers. That gamble proved controversial: by virtue of his good offices, Adolfo de la Huerta's public esteem positioned him as a natural candidate to succeed Obregón in the 1924 presidential succession. In a short time, this circumstance fractured the relationship between Obregón and the former governor of Sonora, especially since the former favoured General Plutarco Elías Calles, who until then had been the third vertex of the Sonoran triangle.

Moreover, the chapter also pays attention to the outcome of this crisis in political-military terms: the call for general insurrection that De la Huerta finally launched at the end of 1923 found an echo among those revolutionary generals who had been wronged by Obregón's administration. In this context, the outcome of the crisis showed that the use of the military instrument was still relevant in deciding Mexico's fate. Accordingly, the battle of Ocotlán (understood as a decisive battle that pitted two factions of the same army against each other) must be placed within the framework of a campaign that was governed by a central strategic gamble: to prevent a new armed uprising from endangering the national reconstruction effort launched in 1920. Against this background, the conquest of the present was decided by the use of two means that the government of the

Revolution was able to coordinate in a successful way: diplomatic recognition of the constituted government, which ultimately secured the financial and material resources needed to sustain the war effort, and the use of the military instrument in the context of a campaign that was conducted thanks to Obregón's collaboration with two notable subordinates: Plutarco Elías Calles and Joaquín Amaro.

The reestablishment of dialogue with the outside world and its strategic consequences

Under the provisional government headed by Adolfo de la Huerta (1920) after the triumph of the Aguaprieta Rebellion, the nationalist rhetoric of the new regime was accompanied by efforts to definitively break Mexico's international isolation. Within the framework of the five months that his administration lasted, between June 1 and November 30, 1920, the president sought to re-establish a permanent dialogue with the United States, in an effort to resolve the differences related to the oil question, the service of the Mexican external debt, and the claims of those American citizens whose interests were affected by the outcomes of the Mexican civil war. As a result, the reconciliation of Mexico with the outside world "necessarily involved achieving the acceptance of the American government and its interests, since it was evident that Europe would only resume its relations with Mexico if the United States did so first."[496] Behind the initiative was a clear purpose: to restore the credibility of the Mexican financial system in order to allow the creation of a Central Bank in accordance with the provisions of the new Mexican constitutional framework.[497]

In this way, the true strategic significance of the reestablishment of Mexico's dialogue with the international community was revealed in all its breadth in the following years. Under the administration of Álvaro Obregón (1920-1924), the reorganisation of the Mexican banking system was considered a necessary precondition for re-establishing lines of credit from abroad. At the same time, the decision to resort to foreign credit was aimed at dealing with a structural

[496] Luis Sánchez Amaro, *La rebelión delahuertista en Michoacán 1923-1924*, Mexico City, Instituto Nacional de Estudios Históricos de las Revoluciones de México/Universidad Michoacana de San Nicolás de Hidalgo (2016), p. 47

[497] "A single bank of issue would allow the consolidation of monetary and banknote circulation and would provide the State with financial autonomy, by leaving control of the new body in its hands." Collado, Op. cit., p. 361

vulnerability of the new State: the absence of a solid fiscal regime, capable of providing the necessary resources to advance in the reconstruction of the country. Under this perspective, maintaining the balance of the federal budget became a vital necessity, since the Mexican government lacked lines of credit to cover the deficit generated by the public administration. Within the latter, military spending was still the most significant: in 1921 just over 50 percent of the budget was still allocated to the armed forces. [498] If the government of the revolution really aspired to launch a nationwide reconstruction program, then it would first have to tackle these serious vulnerabilities.

A strategic bet for the reestablishment of Mexican credit abroad

To face such challenges it was necessary to resort to a careful government exercise, which Obregón put in the hands of Adolfo de la Huerta, the only man up to this challenge within the triangle formed by the victors of Agua Prieta.[499] As Minister of Finance, De la Huerta continued the rapprochement with the representatives of the Mexican banking system that he had initiated during his administration as interim president, also strengthening the dialogue with the International Bankers Committee, an organisation that brought together Mexico's international creditors aggrieved by the revolution.[500] In the development of the legislative initiatives presented in those years to the Congress to establish a Central Bank in his country, the new minister had the assistance of Manuel Gómez Morín, a young lawyer who would later occupy a prominent place within the political life of his country.

[498] Ibid., p. 372

[499] Roberto Guzmán Esparza, "Don Adolfo De la Huerta, Ministro de Hacienda" in *Memorias de Don Adolfo de la Huera según su propio dictado*, Mexico City, Senado de la República (2003), pp. 254-256. The first edition of this work was published in 1957 by Ediciones Guzmán.

[500] The first group, made up of the financial institutions that were established in the country before the outbreak of the revolution, was headed by Agustín Legorreta and the representatives of the National Bank of Mexico through the Executive Commission of Issuing Banks of the Mexican Republic. The second group, that of the American bankers, was headed by Thomas W. Lamont, representative of the interests of J. P. Morgan in Mexico. A third group, that of European bankers, was headed by Sir William Wiseman. Collado, Op. cit., pp. 362-67. As for the nature of the differences between the Mexican revolutionary government and the country's private banks, aggrieved by the seizures that the First Chief decreed as of 1916, see Abdiel Oñate, "La batalla por el Banco Central: Las negociaciones de México con los banqueros internacionales, 1920-1925," *Historia Mexicana*, vol. 49. no. 4 (2000), pp. 639-41

The negotiations were complex both at the domestic and the international levels: despite the best efforts of the Finance Minister on both fronts, the United States Government made its diplomatic recognition conditional on a process of renegotiating the Mexican debt, which was unfavourable to Mexico's interests.[501] Similarly, the possibility of concluding a Treaty of Friendship and Trade between the two countries was conditioned by the American request to reverse the decisions adopted by the Mexican authorities in relation to oil.[502] The proposal was unacceptable for a government that at that time wanted to increase taxes on the oil sector in order to channel this source of income to service the external debt. Thus, in the summer of 1921, the administration of President Obregón decided to raise taxes on the export of hydrocarbons, also creating a special tax on the production of crude oil.[503] The response was immediate, as the representatives of the oil companies in Washington pressured the Harding administration to send warships to the Mexican coast. [504]

However, in September of that same year Thomas W. Lamont travelled to Mexico to facilitate an agreement on the Mexican debt with the endorsement of the International Committee of Bankers.[505] De la Huerta reciprocated that visit in May 1922 by traveling to New York, where he hastily worked to conclude a satisfactory agreement for Mexico.[506] However, the high expectations of the man responsible of the Mexican public treasury were promptly dashed because what was achieved at the end of the negotiations was not particularly favourable to the national interest of his country: later known as the De la Huerta-Lamont Agreement, the settlement negotiated in June of that year forced the Mexican government to recognize a debt of just over 500 million dollars, to which was added an additional 207 million for interest that would have to be covered under especially harsh conditions. [507] Once again, Mexico was the object of a treatment similar to that

[501] Un recuento general de este amplio y complejo proceso de renegociación es presentado por Lorenzo Meyer en "La Revolución Mexicana y el mundo: un acomodo difícil (1917-1923)" in *La marca del nacionalismo*, Mexico City, El Colegio de México (2010), pp. 39-46
[502] Collado, Op. cit., p. 367; Oñate, Ibid., p. 650
[503] Collado, Op. cit., p. 368
[504] In July 1921, two US warships approached the shores of the Gulf of Mexico at the request of the US Consulate in Tampico; Obregón then assumed that these movements were the first step in a broader intervention. Martha Strauss, "Relaciones entre México y los Estados Unidos: 1921," *Estudios de Historia Moderna y Contemporánea de México*, vol. 10, no. 10 (1986), pp. 186-187
[505] Oñate, Op. cit., pp. 655-57
[506] Ibid., pp. 657-58; Op. cit. Sánchez Amaro, p. 49. Cf. with "Los arreglos financieros llevados a cabo entre el Gobierno Mexicano y el Comité Internacional de Banqueros" in Guzmán Esparza, Op. cit., p. 259
[507] The agreement of June 16, 1922, points out Sánchez Amado, "recognised a debt that included the railroad one and unpaid interest since 1914. The total amount was 508 million 830 thousand 321 dollars that would be

which the defeated powers had received at the end of the First World War. However, these limitations were qualified by the Secretary of the Treasury himself, who convinced President Obregón of the need to ratify the agreement, which was approved by the Mexican Senate on September 29, 1922.[508] De la Huerta thus made a dangerous bet: he assured the Caudillo that the signing of the agreement would be followed by the reestablishment of the lines of credit necessary to establish a Central Bank in Mexico. [509]

The complex nature of the negotiations undertaken by De la Huerta, as well as their high strategic significance for the Mexican government, raised the secretary's public profile in the context of a new moment of political turmoil generated by the 1924 presidential succession. For this reason, the decisions of the Minister of Finance did not go unnoticed in the Ministry of Foreign Affairs, headed since January 1923 by Alberto J. Pani, the man that Carranza had chosen to follow up on the Paris Conference in 1919.[510] From then on, the dialogue initiated by De la Huerta from the Ministry of Finance advanced simultaneously with a series of negotiations facilitated by Pani in the residence that the Ministry of the Interior had occupied since the beginning of the century on Bucareli street, in the heart of Mexico City. The enmity between the two officials was evident, especially because De la Huerta understood that his political future was directly linked to the success or failure of negotiations in which the diplomatic recognition of the government headed by Álvaro Obregón was at stake.[511] Over the course of the following months, the Bucareli Conference would set the precedent for a serious political controversy that ended up fracturing the consensus reached by the men of Sonora regarding the future of their country and dialogue with the United States.

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paid over a period of forty years to from 1923 and in minimum annual instalments of 15 million dollars, and these resources would come, basically, from oil taxes". Op. cit. Sánchez Amado, pp. 49-50. Furthermore, explains Collado, no write-offs were granted on overdue interests, "although payment of these was deferred until 1928, stipulating that they would be covered in forty annuities that would end in 1968." Op. cit. Collado, p. 370

[508] De la Huerta's arguments were extensively developed in "Informe rendido por el C. Secretario de Hacienda y Crédito Pública, al C. Presidente de la República" in Guzmán Esparza, Op. cit., pp. 260-284

[509] Ibid. Collado, pp. 371-372. Cf. with Oñate, Op. cit., pp. 657-658, who presents a much more severe criticism of De la Huerta's performance in the context of these negotiations.

[510] Pedro Castro, *Adolfo de la Huerta y la Revolución Mexicana*, Mexico City, Instituto Nacional de Estudios Históricos de las Revoluciones de México (2020), pp. 66-67

[511] Pablo Serrano Álvarez, *Los Tratados de Bucareli y la rebelión delahuertista*, Mexico City, Instituto Nacional de Estudios Históricos de las Revoluciones de México (2012), p. 23

The fracture of the Sonoran triangle and the path to a new uprising

Over the summer of 1923 the Bucareli residence served as the setting for a series of meetings that convened a group of commissioners selected by the governments of Mexico and the United States with the express purpose of resolving diplomatic differences between the two countries. To advance this process, the delegates made use of the Convention of Claims of 1868, a legal instrument that laid the foundations for the two agreements that were finally adopted at the end of the negotiations: a Special Claims Convention, which sought to address the losses that U.S. citizens had suffered during the Mexican civil war, and a General Claims Convention, which sought to address all those claims not directly related to the damages caused by the Mexican Revolution.[512] The minutes of the sessions held by the negotiators were added to this general framework, and as a result many executive measures agreed by both parties were included as part of the final agreement. Ultimately, this proved to be controversial in Mexico, especially because the orientation of the agreement was openly opposed to the legal order established by the 1917 Constitution. Significantly, De la Huerta was excluded from this negotiation process, which was headed by commissioners selected directly by Obregón in consultation with Pani.[513]

Close to the circle of political leaders who were part of the National Cooperatist Party, De la Huerta had been considered for some time as a figure with sufficient merits to aspire to the Presidency of the Republic. Certain of having the backing of Jorge Prieto Laurens, the most prominent of the Cooperatist leaders, the Minister of Finance also found broad sympathy in the urban centres and among the country's middle classes.[514] In contrast, General Plutarco Elías Calles, who since December 1920 had held the portfolio of the Interior, was backed by the parties that had previously brought together the peasant and worker masses of Mexico: the Mexican Labor Party, close to the Regional Confederation of Mexican Workers, the National Agrarian Party, and the Socialist Party of the Southeast, among others. [515] More importantly, Calles had the sympathies of Obregón, a

[512] For an account of the legal foundations of these instruments and how they were interpreted, see Marcela Mijares, "Federales, revolucionarios, y bandoleros: los daños de la lucha armada en la Convención Especial de Reclamaciones, 1923-1931," *Legajos*, no. 8 (2011), pp. 15-34

[513] Serrano Álvarez, Op. cit., p. 24

[514] Castro, Op. cit., *Adolfo de la Huerta y…*, pp. 85-92

[515] Georgette José Valenzuela, "La rebelión Delahuertista: Sus orígenes y consecuencias políticas, económicas, y sociales" in Javier Garciadiego (ed.), *El Ejército Mexicano: 100 años de historia*, Mexico City, El Colegio de México (2014), p. 220

caudillo jealous of his own power in a country still in need of strong men to advance its process of political institutionalization. It was not surprising, then, that the growing notoriety of Adolfo de la Huerta was seen as a threat to Obregón's purposes. By mid-1923 the break between the three men who previously formed the Sonoran triangle seemed imminent.

Finally, when De la Huerta was able to read the terms of the Bucareli Agreements, he found them to be unacceptable to what he considered the best interest of Mexico.[516] In general, the minutes of what was agreed upon by the commissioners showed that the Mexican government was willing to abandon a strict interpretation of the provisions of the 1917 Constitution in exchange for diplomatic recognition by the United States. The price to pay was evident: giving up the possibility of retroactively granting the provisions of article 27 of the new Constitution in order to preserve the interests of foreign companies operating in Mexico, especially favouring those linked to the oil sector. A similar solution was agreed for those groups or individuals from abroad who had lost their properties in the framework of the land distribution that accompanied the agrarian reform. [517] Not unreasonably, De la Huerta made Obregón see that these measures contravened the spirit of a revolution that from the beginning sought to put an end to the pretence of granting exceptional treatment to foreigners in Mexico. [518] The Caudillo refused to listen to his Minister, who in August expressed his intention to resign from the Finance portfolio.[519] Consequently, the political crisis that was growing little by little in Mexico at the end of 1923 had its origins in the enormous geopolitical gravitation that the United States already exercised over the regime of the Mexican Revolution. A pragmatist, Obregón understood that Washington's recognition was a necessary precondition to guarantee the regime's survival. [520]

In accordance with the understanding reached by the authorities of both countries, on September 1, 1923, the Government of the United States officially recognised the Obregón administration, granting the regime the international legitimacy it needed to access the resources that would give continuity to the process of national reconstruction started in 1920.[521] Shortly afterward, General

[516] "Los Tratados de Bucareli" in Guzmán Esparza, Op. cit., pp. 295-313
[517] Serrano, Op. cit., pp. 15-22
[518] Guzmán Esparza, Op. cit., pp. 297-99
[519] Serrano, Op. cit., p. 29
[520] Sánchez Amaro, Op. cit., p. 51. Cf. with Pedro Castro, "La intervención olvidada: Washington en la rebelión delahuertista," *Secuencia*, no. 34 (1996), pp. 63-92
[521] José, Op. cit., p. 219

Plutarco Elías Calles announced that he would run for the presidency of the Republic. However, when responding to the words pronounced by the president in the framework of his third State of the Union Address before the Congress, Jorge Prieto Laurens, in his capacity as leader of the Cooperatista majority in the Chamber of Deputies, warned that the Caudillo would be wrong to follow in the footsteps of the autocrats who had previously violated the principle of Effective Suffrage, established by the 1910 Revolution.[522] Mexico would not witness a similar political spectacle again until 1997, when Porfirio Muñoz Ledo, coordinator of the caucus of the Party of the Democratic Revolution, responded critically to the third State of the Union Address of President Ernesto Zedillo Ponce de León (1994-2000). "It is the citizen's will, not complicity with power, that has brought us to this chamber," said the most prominent representative of the Mexican parliamentary opposition at the time.[523]

If these political resonances today are surprising, it is no less surprising to verify that what happened in the last months of 1923 really put at risk the viability of a political system that at that time still rested on an extremely fragile institutional scaffolding. In a short time, the internal political dynamics that Mexico was experiencing at that time called into question everything that the revolutionary authorities had achieved up to that moment: as in the days of Carranza, the presidential succession once again became a dangerous process that anticipated the possibility of serious disorders for Mexico. [524] Throughout the following three decades, this possibility would become recurrent: almost without exception, the federal elections organized between 1924 and 1952 to allow the renewal of the presidential investiture were accompanied by violent incidents, which disprove the thesis that the new system Mexican politician consolidated its hegemony from an early date. [525]

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[522] Georgette José Valenzuela, "Entre el poder y la fe. El Partido Nacional Cooperatista. ¿Un partido católico en los años veinte?" in Patricia Galeana (comp.), *El camino de la democracia en México*, Mexico City, Archivo General de la Nación/Instituto de Investigaciones Jurídicas (1998), p. 211-212; Op, cit. Castro, *Adolfo de la Huerta y…*, pp. 90-91

[523] Porfirio Muñoz Ledo, "Respuesta al Tercer Informe de Gobierno del presidente Ernesto Zedillo Ponce de León, por el presidente del Congreso de la Unión, diputado Porfirio Muñoz Ledo," *La Jornada* (2 September 1997) [online].

[524] This thesis is explored by Georgette José Valenzuela in "Campaña, rebelión y elecciones presidenciales de 1923 a 1924 en México," *Estudios de Historia Moderna y Contemporánea de México*, vol. 23, no. 23 (2002), pp. 55-111

[525] It is interesting to note that, contrary to what one might think, as of 1910 the need to win a favourable impression towards public opinion was an important aspect for all those political actors interested in the conquest of political power. As Gillingham points out, "despite the tendency for presidential elections to be preceded by military uprisings, and for elections of all kinds to be bracketed by violence, popular preferences

A reason of strategy: the rebellion of Adolfo de la Huerta and its aftermath

On 23 September 1924, Adolfo de la Huerta tendered his resignation from the Ministry of Finance, as he had previously informed the President of the Republic. A few days later, Obregón appointed Alberto J. Pani in his place and also asked the new minister to open an investigation into his predecessor's probity. In mid-October, Pani presented a report stating that De la Huerta had embezzled funds amounting to 42 million pesos.[526] In November, the legislators belonging to the Cooperatist caucus in the Congress suffered an armed attack that implicated figures close to Luis N. Morones, the leader of the Regional Confederation of Mexican Workers, as well as many prominent members of the National Agrarian Party. [527] The patterns of the new political crisis were familiar: in mid-1923 the federal Government intervened in the process of renewing the governorship of San Luis Potosí, a state in which Jorge Prieto Laurens, a central figure of the National Cooperatist Party, had emerged as a serious contender. Confronted with Jorge Manrique, candidate of the National Agrarian Party, Laurens also soon ran into opposition to his political pretensions in Mexico City.[528] With the endorsement of the capital, Manrique's supporters resorted to mobilising the *agraristas* led by General Saturnino Cedillo, one of the many strongmen who then exercised direct control over large portions of the national territory. [529] When the state elections were held in July 1923, both groups made use of a resource that had already been widely used during the campaign: the exercise of violence, placed in the hands of gunmen and other armed actors at the service of local interests. [530]

counted". Paul Gillingham, "Mexican Elections, 1910–1994: Voters, Violence, and Veto Power" in Roderic Ai Camp (ed.), *The Oxford Handbook of Mexican Politics*, Oxford, Oxford University Press (2012), p. 57. Regarding what happened in the 1920s, Servin points out that "In all cases, and despite the fact that it is clear that the transmission of presidential power is fundamentally a matter of military force and political control, the importance of Congress stands out as the institutional space in which it is sought to solve in the first instance the problem of the presidential succession." Servín, Op. cit., p. 37.

[526] Serrano Álvarez, Op. cit., p. 31. According to Pedro Castro, Pani "reported that the 1923 fiscal year had begun with an imbalance, since Congress authorized expenditures of 348,487,278.47 Mexican pesos, despite the fact that the income of 1922 had reached only 283,846,599.59 Mexican pesos, 'without there being anything that could justify, for 1923, a forecast of an appreciable increase in tax collection'." Castro, Op. cit., *Adolfo de la Huerta y…*, pp. 95-96

[527] José, Op. cit., p. 221

[528] Castro, Op. cit., p. 90

[529] Romana Falcón, "La era radical (1920-1925)" in *Revolución y caciquismo: San Luis Potosí, 1910-1938*, Mexico City, El Colegio de México (1984), pp. 149-51

[530] Ibid., p. 151

At the end of that year, Mexico definitively advanced towards a new crisis scenario in which armed violence would once again play a determining role. On November 20, 1923, the National Convention of the National Cooperatist Party, headed by Prieto Laurens, proclaimed that Adolfo de la Huerta had been selected as the man that would contend for the Presidency of the Republic in the general elections that would take place on July 6, 1924.[531] Ten days later, General Rómulo Figueroa, Chief of Military Operations in Guerrero, threatened to dismiss Governor Rodolfo Neri, a civilian who, like Tejeda in Veracruz or Múgica in Michoacán, had favoured the cause of agrarianism in his state over the last few years.[532] Figueroa's reasons —which Obregón found unacceptable— are of interest in the context of the new political crisis that was shaking Mexico in that moment: when explaining to the President the reason for his break with the local government, the general resorted to the Agua Prieta precedent, pointing out that he only intended "to act against that administration as it was done in 1920." [533] Finally, on December 5, 1923, Jorge Prieto Laurens made a call from Xilitla, San Luis Potosí, to ignore the constituted powers in order to avoid the imposition of Calles as president of the Republic.[534] A day later, General Guadalupe Sánchez seconded the general insurrection from Veracruz, inviting Adolfo de la Huerta to assume the leadership of the new armed movement.[535] On December 7, De la Huerta released a manifesto, also known as the Veracruz Plan, in which he urged the nation to disregard the constituted powers, in order to confront a regime that "has not hesitated to uproot the people from their sovereign power to elect their leaders by means of suffrage." [536] As a result, the argument used to justify the uprisings against Díaz (1910) and Carranza (1920) was used once again; this time to put an end to the Obregón-led regime. The new rebels believed that they could repeat the feat of Agua Prieta; however, in a short time they were to discover that "Obregón was not Venustiano Carranza, nor was Calles Engineer Bonillas." [537]

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[531] Castro, Op. cit., *Adolfo de la Huerta y…*, p. 98
[532] Enrique Plasencia de la Parra, *Personajes y escenarios de la rebelión Delahuertista, 1923-1924*, Mexico City, Miguel Ángel Porrúa Editores (1998), pp. 173-176
[533] Castro, Op. cit., *A la sombra de un caudillo…*, p. 74
[534] Jorge Prieto Laurens, *Cincuenta Años de Política Mexicana*, Mexico City, Editora Mexicana de Periódicos, Libros y Revistas (1968), p. 191
[535] Castro, Op. cit., *A la sombra de un caudillo…*, p. 76
[536] Adolfo de la Huerta, "Manifiesto Revolucionario," Veracruz (7 December 1923) reproduced in *Planes en la Nación Mexicana*, vol. 8, Mexico City, Senado de la República (1987), p. 79
[537] José, Op. cit., "La rebelión delahuertista…", p. 222

A new armed rebellion threatens Mexico City: strategic imperatives of the uprising

Initially, the outcome of the new military uprising was not entirely clear. In western Mexico, General Enrique Estrada, Chief of Military Operations in Jalisco, took control of Guadalajara, one of the most important cities in the country. In the hands of General Guadalupe Sánchez, the port of Veracruz was used as a starting point to allow the rebel forces to advance to the highlands. This initiative was supported in Puebla by Governor Froylán Manjarrez, a former Constituent Deputy and a close collaborator of Adolfo de la Huerta in previous years, who also decided to join the insurrection. [538] By virtue of these circumstances, the War Ministry was forced to plan a campaign defined by the existence of two large theatres of operations: in the first of them, General Estrada threatened to consolidate a dominant position in western Mexico; in the second, the eastern one, General Guadalupe Sánchez seemed to be in a position to consolidate his control over the line of communications that linked the port of Veracruz with the city of Puebla.[539] The union of both war fronts would allow the siege on Mexico City if the rebels were not contained in a timely manner.[540] In this way, the possibility of putting an end to the new uprising was determined by a war of movements in which each step taken by the National Army had to be anticipated with special care.

According to Borges, when it comes to combat, men are generally indifferent to the name of the place where it has taken place. "The names are put later by historians."[541] Something similar happens with armed uprisings: as far as Mexico is concerned, the insurrection that began in the first days of December 1923 would later be known as the Delahuertista Rebellion. To confront it, the Mexican State had to make a supreme effort, which tested the military skills of a National Army still in the process of being formed. Mexico then had a line army made up of just over 70,000 men, of which around 26,000 supported the rebellion. Led by 102 generals, 573 chiefs, and about 2,500 officers, the rebels represented about 40 percent of the federal forces at the time.[542] In contrast,

[538] Castro, Op. cit., *A la sombra de un caudillo…*, p. 76
[539] Ibid., pp. 76-80. Cf. with Plascencia de la Parra, Op. cit., pp. 23-196
[540] Formally, it is possible to speak of four major theatres of operations: (i) the western one, where the plaza de Guadalajara occupies a central place; (ii) the eastern one, where the Puebla-Veracruz axis is preponderant, and those of the (iii) south and centre and (iv) southeast, which actually occupy a secondary place for the development of this campaign. Plascencia de la Parra, Ibid., *Passim*.
[541] Jorge Luis Borges, "El otro duelo" in *Obras Completas 1923-1972*, Buenos Aires, Emecé Editores (1974), pp. 1059. This story was originally published in 1970 as part of the collection of short stories reproduced in *El Informe de Brodie*.
[542] José, Op. cit., p. 239

the Minister of War, General Francisco Serrano, estimated that the government still had eleven corps from the three arms, with an approximate total of just over 44,000 men at its disposal. [543] The government's challenge in the last weeks of December 1923 was very clear: to prevent the rebels from consolidating their movement along the lines of communication established in both theatres of operations in order to make possible a two-pronged advance on Mexico City. Under such circumstances, getting weapons, ammunition and supplies became a pressing need for both sides.[544]

It was then that the measures taken by Governor Adalberto Tejeda and other leaders close to the land-reform movement bore fruit: contrary to General Guadalupe Sánchez's expectations, the Civil Guard units stationed in Xalapa tenaciously resisted the advance of the rebel troops from the port of Veracruz. The defence of the city, led by the 25th battalion of the state Civil Guard, was joined by many of the armed *agraristas* who had previously been sheltered by the Tejeda administration. With them also marched workers, municipal employees and people who in previous years took part in the Veracruz tenant movement, one of the first expressions of organised urban social struggle that the country experienced.[545] The counteroffensive rapidly spread along the Interoceanic Railroad line, where Tejeda received the help of General Heriberto Jara and other commanders who thus impeded the consolidation of a stable line of communications between the rebels of Veracruz and Puebla.[546]

Meanwhile, in Mexico City the leaders of the National Agrarian Party, led by Antonio Díaz Soto y Gama, called for the defence of the constituted government, pointing out that Adolfo de la Huerta headed a counterrevolutionary movement that sought to put an end to the social conquests already achieved by the Mexican peasantry.[547] The party's propaganda did not hesitate to characterize General Guadalupe Sánchez as a dangerous enemy of the revolution: a true "persecutor of revolutionaries, murderer of agraristas, and infamous instrument of the landowners

[543] Castro, Op. cit., *A la sombra de un caudillo…*, p. 76. To estimate the number of men who remained loyal to the government we have used data from the Ministry of War presented by José in Loc. cit.
[544] Ibid., p. 243
[545] Falcón, Op. cit., pp. 163-64
[546] Ibid., p. 165
[547] Pedro Castro, "Antonio Díaz Soto y Gama y las vicisitudes del Partido Nacional Agrarista," *Iztapalapa*, no. 50 (2001), p. 389

and the Spaniards of Veracruz." [548] Thus, supporters of agrarianism called on peasants throughout the country to take up arms against the "counterrevolutionaries" led by De la Huerta. For its part, the Regional Confederation of Mexican Workers also made a call to defend the conquests of the Mexican Revolution, pointing out that Delahuertistas and Cooperatistas were actually enemies of the proletariat. Thus, while the National Agrarian Party took on the task of creating a Department of Military Action, the most important labour organisation in Mexico sought to establish a Revolutionary Organizing Committee to train military cadres among its members. Both efforts created precedents that would not be forgotten in the next two decades.[549]

However, although the contribution of the agraristas, the labour unions and other groups of armed irregulars ultimately proved extremely useful for the government's cause, in fact the weight of the combat fell on the regular troops who, with great effort, had been disciplined in recent years. Under the leadership of Obregón, who asked the Congress for extraordinary powers to organize the defence of the constituted order, the government established a division of labour that allowed the conduct of the campaign to advance effectively. [550] From Mexico City, the Minister of War was able to take care of the logistical needs of the army, perhaps one of the most important tasks of any war effort. Meanwhile, General Calles established a supply line in the north of the country that allowed him to receive supplies and weapons from the United States, thus demonstrating the strategic value of the negotiations reached in Bucareli.[551] Ultimately, it was Obregón himself who spearheaded the campaign in western Mexico, where he called on seasoned generals like Juan Andrew Almazán, Lázaro Cárdenas, and Gonzalo Escobar to ensure the proper deployment of forces loyal to the government. In planning the campaign, however, the Caudillo chose to surround himself with a man who in the following weeks would amply demonstrate the extent of his strategic genius: General Joaquin Amaro.[552]

Meanwhile, on the eastern front, General Eugenio Martínez was tasked with wresting control of the city of Puebla from the rebels. It was a fully justified order considering what happened in that

[548] Ibid., p. 390
[549] Ibid., p. 391; José, Op. cit., "Campaña, rebelión…", p. 88, note 60
[550] José , Op. cit., "La rebelión delahuertista…", p. 244. Cf. with Plascencia de la Parra, Op. cit., pp. 160-61
[551] Ibid. Plascencia de la Parra, p. 130
[552] Martha Beatriz Loyo Camacho, *Joaquín Amaro y el proceso de institucionalización del Ejército Mexicano, 1917-1931*, Mexico City, Miguel Ángel Porrúa (2010), p. 112

town in mid-December 1923: although Governor Manjarrez had been quickly removed thanks to the timely intervention of General Juan Andrew Almazán, it did not take long for the state to fall into the hands of the Delahuertistas. Hence, when Vicente Lombardo Toledano, one of the central figures of the Mexican Labour Party, sought to assume the government responsibilities abandoned by Manjarrez, he found that his position was seriously compromised due to the advance of General Fortunato Maycotte, a rebel commander hailing from Oaxaca that sought to join Sanchez's forces. For that reason, General Serrano ordered Almazán to leave the capital of Puebla, which was captured by the rebels on December 15, 1923.[553] However, the advantage gained by the Delahuertistas was momentary: although Adolfo de la Huerta was formally recognised as Supreme Leader of the uprising, in fact the rebels lacked a guiding centre capable of exercising an adequate strategic direction of their campaign against the government forces. A reason of strategy was missing, especially since many of them only took part in the uprising convinced that Delahuertismo was a useful façade needed to conceal their own political ambitions.

In contrast, in the government's camp there is a relentless pace of activity: in the space of a few days, General Martínez launched a federal offensive in the eastern theatre of operations that allowed him to close in rapidly on Puebla, a city that was finally taken by storm on December 22, 1923.[554] A short time later, General Serrano arrived in Puebla in order to coordinate from there, in his capacity as War Minister, the advance of the government forces on the line of communications that led to Veracruz. [555] Finally, on January 28, a battle was fought near the town of Esperanza in which the forces of General Guadalupe Sánchez were defeated by government soldiers. The victory, which was due to the military merit of General Martinez, robbed the rebels of the possibility of preventing the advance of the government forces towards the towns of Orizaba and Jalapa. From that moment on, the fall of the port of Veracruz was considered imminent and inevitable.[556]

The battle of Ocotlán and the conquest of the present

However, in the western theatre things were not so simple for the government forces. After establishing his base of operations in Guanajuato, the Caudillo understood that there were serious

[553] Plascencia de la Parra, Op. cit., p. 48
[554] Ibid., p. 54
[555] Castro, Op. cit., *A la sombra de un caudillo…*, p. 80
[556] Plascencia de la Parra, Op. cit., pp. 71-72

practical challenges that prevented him from conducting the campaign with the desired speed: the National Army not only lacked the number of horses to move the required men and war matériel, it also did not have the necessary contingent to wage a decisive battle against an enemy that by then already established an effective line of defence on the western bank of the Lerma River, on the access route that would allow the federal advance over Guadalajara. Enrique Plascencia de la Parra points out that the president had to fight on several fronts, thus he "used the mobilisation of troops from one front to another as a strategy," preferring this to the possibility of forcing a general levy, "not only because of the danger that the new elements, once armed, would defect upon first contact with the enemy, but also because he had no confidence in their skill and preparation." [557] Like the enlightened despots of the eighteenth-century, Obregón feared that a prolonged campaign would cause him to lose the forces he had massed to fight the rebels.[558] The latter, on the other hand, had superior cavalry, but they could not launch an open battle against the government forces because they also lacked sufficient ammunition and equipment. [559] Like the condottieri of Renaissance Italy, commanders on both sides preferred a mode of warfare that resorted to surprise in order to minimize bloodshed and preserve the integrity of the armies. [560]

[557] Ibid., p. 122

[558] Evoking the criteria of Louis de Jaucourt, Starkey points out that in the eighteenth century desertion was considered as "the result of forcing men to serve and then spending them like money." As a result, and in the opinion of Jaucourt, the nations of Europe "recruited the vilest of their subjects into their armies and therefore could not expect them to act as had the citizen-soldiers of Rome." Armstrong Starkey, "The Culture of Force" in *War in the Age of the Enlightenment, 1700-1789*, Westport, Praeger (2003), p. 24. As for the restrictions that desertion imposed on the military behaviour of the princes of that period, see R. R. Palmer, "Frederick the Great, Guibert, Bülow: From Dynastic to National War" in Peter Paret (ed.), *Makers of Modern Strategy*, Princeton, Princeton University Press (1986), pp. 91-122 y Beatrice Heuser, "Themes in early thinking about Strategy" in *The Evolution of Stratey*, Cambridge, Cambridge University Press (2010), pp. 82-96

[559] Plascencia de la Parra, Loc. cit.

[560] In effect, points out Mallet, the first essential for an Italian commander in war "was a firm and secure base; the fortress or field fortification in which he could not be surprised." From this, he concludes, such a commander "could strike out to ravage or destroy, thus weakening the enemy state and perhaps provoking its army into a false move. By superior knowledge both of the enemy, through spies, and of the terrain, he hoped to be able to catch his opponent at a disadvantage. Then by the speed of his movements and the mobility and discipline of his troops, he hoped to seize his advantage." Michael Mallet, "The Art of War" in *Mercenaries and their Masters*, Barnsley, Pen & Sword Military (2009), p. 154. Regarding the behaviour of Mexican commanders, in 1927 a report by the Military Intelligence Division of the United States War Department stated the following: "Whenever possible, a Mexican commander prefers manoeuvre to combat [...]. In the most absolute anarchy, soldiers usually shoot from the hip, wasting ammunition and preferring the long-range shot, which avoids the fray. This explains why there are few deaths in military-to-military combat." Military Intelligence Division, War Department General Staff, 2025. 403 (March 1927) quoted by Jean Meyer in *La cristiada*, vol. 1, Mexico City, Siglo Veintiuno Editores (1985) pp. 163-164

Seriously wounded during the fighting, Cárdenas asked Buelna for guarantees for his men, who, according to the general from Michoacán, "have done nothing but carry out their duty and my orders."[561] This young commander, barely 28 years old in 1923, knew that he was at the mercy of the rebels. In Puebla, the government troops had no consideration for the surrendered rebels, who were summarily shot.[562] However, General Enrique Estrada gave ample consideration to General Cárdenas, who was recognised for an irreproachable military conduct. By doing so, he allowed Cárdenas to access the medical care that he so urgently needed in Guadalajara.[563] In more ways than one, Estrada's decision defined the future of Mexico: without knowing it, the rebel general saved the life of someone who would soon occupy a leading role in defining the narratives that would guide the strategic behaviour of that country throughout of the twentieth century.

On the other hand, the debacle of Delahuertismo was also marked by the discredit of a political programme inhabited by theses that at the time were truly innovative: not the surrender of communal property to the permanent tutelage of the State, but the return to small property as the paradigm of a new prosperity for the Mexican countryside; not the exclusion of Mexican women from national public life (which in fact would last for three more decades), but the recognition of their rights as political actors with a voice of their own in the life of their communities; not the return to the personalism of the military caudillos of the past, but the adoption of a parliamentary regime for Mexico.[564] In fact, these were theses that had already been advanced by the militants of the National Cooperatist Party since the end of 1917. However, Mexican society would have to wait almost eight more decades before considering similar proposals again as plausible alternatives for the future of Mexico's public life.

Precisely in relation to the military question, the rebels' position found a point of departure in the call to put an end to the abuses of an incipient presidentialism, because in such a system "the

[561] Ibid. Pérez Monfort, p. 265
[562] The fact is not devoid of significance: the same day in which Cárdenas was defeated, General Arnulfo R. Gómez arranged in the capital for the rebel generals José María de P. Magaña and Fermín Carpio to be executed. Plascencia de la Parra, Op. cit., p. 124
[563] Ibid., p. 127; Pérez Monfort, Op. cit., pp. 266-67
[564] With regard to the agrarian question and women vote, consult numerals 3 and 6 of the manifesto published by De la Huerta in Veracruz on December 7, 1923, reproduced in Op. cit. *Planes y programas…*, p. 79

President needs his own army to safeguard his power, as tyrants of all times have needed it."[565] Such was, according to the insurgents, the origin of the military immorality that had spread among the higher commands of the army, many of whom had endorsed their loyalty to the government thanks to the generous use of public money for that purpose. To deal with this trend, which exerted an unfavourable influence on public spending, the supporters of Adolfo de la Huerta offered a solution that was not unrelated to the aspirations of the men who had preceded them:

> Only military education, the practical and effective adoption of compulsory military service and the organization of the National Reserves, will be able to moralize the army, allow the levelling of budgets and provide, without large stipends, for the respect of institutions, for the preservation of peace. interior and the defence of national integrity. [566]

In fact, the military uprising of 1923 showed that the insurgents' reasons had a solid foundation: without permanent reservations or a socially accepted system of universal conscription, the Mexican State was only partially capable of facing a rebellion that compromised a not inconsiderable part of the line army. The desertion of many of the most prominent commanders of the new National Army cast doubt on its existence as an organic whole; that is, as an armed instrument capable of serving the political purposes of a government that in principle owed its existence to a similar uprising.

Conclusion

As in the Roman civil wars, the contenders who took part in the various armed clashes that began in December 1923 belonged (at least on paper) to the same armies. However, many of the soldiers and officers who joined the rebellion were responding to loyalties forged in the previous decade, when their commanders demonstrated high military competence on the battlefields of the revolutionary war that began in 1910. In fact, that military prestige was the origin of the political clienteles on which their influence rested as strong men at the head of the most diverse regional

[565] This position was extensively developed in an anonymous document published on an uncertain date in 1924 to support the cause of Delahuertismo. "Manifiesto a la Nación" in *Planes y programas…*, Ibid. pp. 87-90
[566] "Sólo la educación militar, la adopción práctica y efectiva del servicio militar obligatorio y la organización de las Reservas Nacionales, podrá moralizar el ejército, permitir la nivelación de los presupuestos y proveer sin grandes estipendios al respeto de las instituciones, a la conservación de la paz interior y a la defensa de la integridad nacional." Ibid., p. 89

chiefdoms. Guadalupe Sánchez had been nothing else in Veracruz: an active cultivator of political clients, an ambitious entrepreneur and, at the same time, a soldier in whom the government of the Republic had entrusted the defence of the rich oil regions of the Huasteca region of Veracruz. [567] Like Sánchez, many other generals believed that the uprising of Adolfo de la Huerta would give them the opportunity to consolidate an ambition that seemed to have no limit. Sula's claim was to liberate the country from tyranny; that of Adolfo de la Huerta was no different, but unlike the Roman dictator, the leadership of his armies never truly fell into his hands: isolated in the port of Veracruz, the Supreme Chief was in reality an instrument at the service of a group of commanders who were only nominally under his command. [568] When these chiefs died or were defeated by the government forces, the soldiers who had fought under their banners had no problem laying down their arms or joining the ranks of the victors. [569]

On the other hand, in the cities contested by the rebels, ordinary people watched with concern a series of events that had little to do with the improvement of their living conditions or their future: like the Romans of Apian, the Mexicans of the third decade of the last century found that the disorders afflicting the Republic had in fact been caused by the ambition of a group of disgruntled generals. As in Rome, sedition had been decided by the use of armies, and for those who had chosen the path of armed violence there seemed to be no restraint "out of a feeling of respect for the laws, the institutions or, at least, the fatherland." [570] However, the Mexican spectacle of 1923 lacked one of the central components of any civil war: the general mobilisation of citizens for or against the contenders. Tired, indifferent or reluctant to participate in this dangerous adventure, those who could have mobilised in favour of the new uprising preferred to stay out of the conflict. [571] In contrast, the peasants who took up arms to fight the rebels did so thinking not so much of

[567] Romana Falcón and Soledad García Morales, *La semilla en el surco*, Mexico City, El Colegio de México (1986), pp. 147-48

[568] Plascencia de la Parra, Op. cit., pp. 161-162

[569] Significantly, since March 1924 General Amaro proposed to President Obregón "to establish a military concentration camp in Celaya [...] to give instruction to the surrendered troops, and to merge the incomplete regiments with the corporations that had suffered setbacks." Loyo Camacho, Op. cit., pp. 117-18

[570] Apiano, *Historia Romana* (*Guerras Civiles*), Book I, Madrid, Gredos (1985), p. 88

[571] In effect, the thesis that civil war only happens when citizens are the central actors of the political community finds a first reference in the republican tradition of Rome. In this regard, consult Op. cit. Armitage, p. 30

defending a government that was openly suspicious of them, but of the need to defend the conquests achieved by the agrarian-reform movement. [572]

Be that as it may, the truth is that by the second half of 1924 the Delahuertista Rebellion had been completely suppressed. The costs for the Mexican State were not minor: the needs of the campaign forced the Obregón administration to use all the financial resources at its disposal to supply and arm the soldiers loyal to the government. Mexico was thus unable to comply with the provisions of the De la Huerta-Lamont Agreement, the instrument that initially sought to normalize the country's relationship with its international creditors. The government also had to put on hold the efforts to advance in the process of national reconstruction, especially with regard to infrastructure works and public education, two items that had occupied a central place in Obregón's program. [573] "It had been a beautiful dream to raise the country through education," wrote by then Public Education Minister José Vasconcelos. "When we were just beginning, our budget was circumvented and reduced to pay addicted troops, to enrich generals, to strengthen again the militarism that has dishonoured us for a century."[574]

In any case, in order to obtain additional resources, the Secretary of the Treasury, Alberto J. Pani, had to take steps with one of the most important oil companies in Mexico: the government was thus able to access an additional 10 million pesos, which were granted to the authorities under the concept of advance on oil taxes. In total, the expenses generated by the rebellion amounted to 40 million pesos. [575] The price in human lives was not minor: it is estimated that no less than 7,000 soldiers died in the fighting that shook the country in those days.[576] However, what the government gained in return was not negligible either: thanks to its successes on the battlefield, the National Army demonstrated that the government of the Revolution had achieved the conquest of the present.

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[572] Plascencia de la Parra, Op. cit., pp. 79-84
[573] José Valenzuela, Op. cit., pp. 259-61
[574] José Vasconcelos, *La creación de la Secretaría de Educación Pública*, Mexico City, Instituto Nacional de Estudios Históricos de las Revoluciones de México (2011), p. 187
[575] José Valenzuela, Op. cit., p. 262. Cf. with Lieuwen, who argues that the total cost was 100 million pesos in Op. cit., p. 78
[576] This figure takes into account the sum of those killed in action in the battles fought on the two main fronts of the campaign between December 1923 and February 1924. Lieuwen, Loc. cit.

Chapter 5. Counterinsurgency and Revolution: The War of the Cristeros, 1926-1929

The victory that General Joaquín Amaro achieved in Ocotlán earned him the definitive recognition of the Caudillo.[577] In the years that followed, the task of achieving the long-awaited reform of the National Army fell into the hands of Amaro, a man who would undoubtedly have stimulated Gibbon's historical imagination: a soldier of humble origins who in the first half of the last century rose to the highest positions of power and prestige to which a military commander could aspire within the republican regime established in Mexico at the end of the great civil war of 1910. [578] As a member of the new ruling class, Amaro is also remembered for following in the footsteps of the lords of Sonora, conquerors of Mexico who "equalled themselves to the ancient ones and competed in wealth and symbols: they acquired extensive estates, palatial residences, and fine automobiles and garbs." Thus, according to Pedro Castro, General Amaro was famous for having made a fantastic social leap that allowed him to become "a paradigm of the symbiosis between the old and the new sovereigns." [579] However, the figure of Amaro stands out, above all, for his condition as a builder of institutions: as time passed, Amaro was recognised for the admirable determination with which he worked in favour of the professionalisation of the revolutionary armies to which he belonged since February 1911, when the Maderista cause led him for the first time to the war front in the mountains of Durango. [580] "Inscrutable, taciturn, and tough minded, he was a brilliant organizer and a stern disciplinarian," points out Edwin Lieuwen. Also, a man renowned by methods that were "often brutal and instantaneous."[581]

As it soon became evident, the military defeat of Delahuertismo did not mean the resolution of the structural problems that had undermined the competence of the National Army. Neither Obregón

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[577] Martha Beatriz Loyo Camacho, *Joaquín Amaro y el proceso de institucionalización del Ejército Mexicano*, 1917-1931, Mexico City, Miguel Ángel Porrúa (2010), p. 116

[578] In effect, by virtue of his career Amaro evokes the figure of Maximinus, the general of barbarian origin who in the third century crowned his meteoric rise with the conquest of political power by armed means. However, unlike the Roman, the Mexican general never directly yielded to this temptation. Edward Gibbon, "Chapter VII" in *The Decline and Fall of the Roman Empire*, vol. i (A. D. 180-476), New York, The Modern Library (1932), pp. 147-48

[579] "Legend speaks about Amaro's renunciation of his maroon earrings, his learning of table manners, his weakness for polo and his friends with aristocratic surnames," adds Pedro Castro in *Álvaro Obregón: Fuego y cenizas de la Revolución Mexicana*, Mexico City, Ediciones Era (2009), p. 121

[580] Loyo Camacho, Op. cit., p. 20

[581] Edwin Lieuwen, *Mexican Militarism: The Political Rise and Fall of the Revolutionary Army 1910-1940*, The University of New Mexico Press (1968), p. 86

nor the group of military reformers led by Amaro was indifferent to the complexity of the challenge ahead. For the Caudillo, the matter also had an urgent moral component: according to the Sonoran general, the corruption that afflicted the army was a symptom of decomposition that had to be tackled energetically and immediately.[582] Obregón seemed to care little about the fact that his own political ambition was no less excessive than that of his peers, especially since the most effective way to fulfil it depended on the possibility of resorting again to the military instrument, that "sick organism" that was about to disintegrate in the first days of 1923.[583] In contrast, Amaro's position in relation to this issue found support in his behaviour during the years that preceded his arrival at the Ministry of War: when he served as a territorial commander between 1922 and 1924 he always remained concerned about the competence of the units that were placed under his care and the education of his officers, incessantly working to address the shortcomings of an army in need of superior referents of behaviour. [584]

In fact, the emphasis placed on the need to moralise the cadres of the National Army was soon expanded to the need to establish a professional officer corps, trained in schools specifically designed for that purpose. The reestablishment of the Military College governed by stricter criteria than had prevailed after the collapse of the old regime was a first step in that direction, but it was not enough: Amaro had in mind a new Superior War College aimed at training officers in the duties of a General Staff, like those that existed in many European powers.[585] Therefore, in order to grant his reform program a solid basis, the Mexican general decided to embrace the precedent set by French military institutions as his model.[586] However, precisely when he was shaping the components of his ambitious reform program, Amaro was forced to face a new irruption of the unexpected in the public life of his country: the outbreak of the first modern insurgency in Mexico, an event that would cast a long shadow over the strategic behaviour of the Mexican State throughout the twentieth century.

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[582] Enrique Plasencia de la Parra, *Personajes y escenarios de la rebelión delahuertista, 1923-1924*, Mexico City, Miguel Ángel Porrúa Editores (2018), pp. 90-91

[583] "He disapproved of the corruption of high-ranking Army chiefs reducing his own —cynically— to the purely anecdotal," points out Plasencia de la Parra in Ibid., p. 284

[584] Loyo Camacho, "El ascenso de Amaro, 1922-1924" in Op. cit., pp. 94-100

[585] Robert Carriedo, *The man who tamed Mexico's tiger: General Joaquín Amaro and the professionalization of Mexico's revolutionary army*, Doctoral Dissertation, Albuquerque, The University of New Mexico (2005), pp. 128-156

[586] Ibid., pp. 157-92

The purpose of this chapter is to highlight the fact that the Cristero war, the uprising of the Mexican Catholic faithful who from 1926 onwards took up arms to defend a traditional way of life threatened by the modernisation project of the Mexican Revolution, must be considered as a central experience for the configuration of the Mexican State' s strategic culture. Thus, the chapter seeks to demonstrate that, in spite of the traditionalist orientation of their political programme, the Cristeros launched a form of insurgent warfare that in a way anticipated the experience of the Latin American guerrillas which emerged on the landscape of Latin American political life during the second half of the last century. At the same time, the chapter highlights the response that the Mexican revolutionary state articulated in those years to deal with this circumstance: a broad counter-insurgency campaign that drew on the precedent of the reconcentration policies used by the great powers in their overseas colonial empires. The chapter concludes with an account of the political impacts of this experience on the behaviour of the Mexican ruling class, highlighting in particular the way in which the Cristeros' challenge highlighted some of the central vulnerabilities of the new Mexican revolutionary state.

A questioned modernity: the path towards a new national emergency

"In the seafaring language of New England," wrote José Emilio Pacheco in 1989 when commenting on the poetic work of T. S. Eliot, "the rocks that protrude under high tide are called *dry*. Because of the danger they represent, the navigators called this set 'savages' since the stones evoked the danger that the redskins meant to them." When making the translation of Eliot's *Quartets* (whose writing began in 1927, a year before the poet openly embraced Christianity), Pacheco could not help noticing the ties that linked Eliot's inner world with the geographical and cultural realities of his country: "thanks to their lighthouse, 'the three savages' (*sauvages*) become *salvages*: means of salvation against shipwreck."[587] Like many other men of his generation, Eliot had previously reacted to the horrors of the Great War when he developed a series of poetic, historical, and philosophical considerations that made possible the writing of *The Waste Land*, a poem originally published in 1922. As it is known, it was a poem haunted "by an awareness that peace has not come so easily to Europe, and there is no easy way for 'war' to be ended and 'peace'

[587] José Emilio Pacheco, "The Dry Salvages" in T. S. Eliot, *Cuatro cuartetos*, Mexico City, Ediciones Era (2017), p. 115. I am indebted to Eduardo Elizalde Rosales and Marco Tulio Martínez Cossío for this reference.

to be established."[588] Faced with such a circumstance, typical of a world in crisis that has lost all its ancient referents, the means of salvation to which Eliot alluded in the *Quartets* reside in his encounter with the faith of Christ; an encounter that, according to Anthony Stanton, was born "around a stubborn search for a principle prior to the individual and to history, a principle that is successively called impersonality, tradition, God."[589] Confronted with the contradictions of modernity, the Anglo-American poet thus discovered a way to return to tradition; or rather, to renew it. [590]

In a way, the procedure that Eliot used in the literary realm was not unknown to practitioners of Christianity in the broad field of social action; it was then when Roman Catholics —as well as the faithful of many other denominations— formulated original ways of approaching modernity and imagining their place in the world of the first decades of the twentieth-century.[591] In Mexico this adjustment generated a harsh response from the men who since 1920 worked incessantly to lay the foundations of a revolutionary State imbued with a particular political theology. Earlier, in 1919, a Mexican poet endowed with an intuition similar to that of Eliot had already expressed his position regarding the outcome of the great civil war that devastated the rich provinces of his country:

> Better not to go back to the village,
> to the ruined Eden lying silent
> in the devastation of the shrapnel.[592]

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[588] Oliver Tearle, *The Great War, The Waste Land and the Modernist Long Poem*, London, Bloomsbury Academic (2019), p. 81

[589] Anthony Stanton, "Cuatro Cuartetos," *Vuelta*, vol. 164 (1990), p. 39

[590] Following the reflections of Vincent Buckley, Liliana Pop points out that Eliot belongs to that group of poets "whose motivational power is to recreate God's action in the world in such a way as to reinforce a senses of its presence and urgency. Such poets seek to redefine a tradition and present an awareness of God." Liliana Pop, "The Use of Poetry and the Use of Religion" in Joe Moffett (ed.), *The Waste Land at 90: A Retrospective*, Amsterdam, Rodopi (2011), p. 96. Cfr. with Tearle, Op. cit., pp. 91-94.

[591] As seems evident, when speaking about this issue it is necessary to stress "the multiplicity of *experiences of* (and *responses to*) modernity that were articulated by specific historical protagonists and the groups and institutions within and through which they acted." John Carter Wood, "Christian modernities in Britain and Ireland in the twentieth century," *Contemporary British History*, vol. 34, no. 4 (2020), p. 501

[592] Ramón Lopez Velarde, "The Malefic Return" in Octavio Paz (comp.), Bloomington, *Anthology of Mexican Poetry*, trans. by Samuel Beckett, Indiana University Press (1958), p. 179. For a general overview of Lopez Velarde's ideological position towards the Mexican Revolution consult Gabriel Zaid, "Liminar" in Ramón López Velarde, *Obra Poética*, Madrid, ALLCA XX/Ediciones Unesco (1998), pp. xxi-xiv. As for the influence that this specific poem has exerted over the Mexican cultural experience consult Guillermo Sheridan, "Márgenes para una tristeza reaccionaria," *Letras Libres* (2017), p. 80

Consequently, Ramón López Velarde, a former member of the National Catholic Party, stated in poetic terms the unease that many felt in the aftermath of a revolutionary process that yielded no more certain results than the immediate anxiety of death. His was a disenchantment caused by the reactionary sadness of those who discover that a return to the world of yesterday is something not only impossible but unwanted.[593]

To understand such a disenchantment, it is necessary to look back at the reconstruction project promoted by the administration of General Plutarco Elías Calles (1924-1928). If Obregón had been a caudillo and, in that sense, the supreme arbiter of a pre-modern order that did not completely disappear in the revolutionary Mexico of those years, General Calles was, in contrast, the architect of a new type of authoritarianism: "a sort of 'bureaucratic dictator,' signified by his authoritarian and centralizing policies, intolerance of dissidence and the 'modernization' of the army." [594] And yet, for a moment Calles appeared as Obregón's creation, "a caretaker president who would return power to the caudillo upon the conclusion of his term."[595] Soon, the political determination of the new president dispelled any doubt regarding the scope of his project. For Calles, the effort in favour of national reconstruction was part of the process of consolidation of the modern State in Mexico:

> Compared to today, the Callista State looks small; but the admirable thing is not so much its real power as the annihilation of every intermediate resource or power. The State-Providence does not yet exist in the deeds, but it does exist in the minds. Politicians and historians who enter Calles' secret cabinets know that neither he nor his secretaries were almighty. But they also know that for ordinary men, the president, the incarnation of the State, or Caesar —as the Cristeros called him— was all embracing. Assuming the role of Providence, the State receives requests from each and every one according to their particular needs. That is why their files are

[593] "The poem is not understood from the position that all past times were better. It is not an escapist poem; it is a cruel poem. It is the poem of someone who believed in a better future and faces the future that has come. From someone who, even at that moment, founds that regression is prohibited: return is evil, sadness is reactionary, better not to return." Gabriel Zaid, "López Velarde reaccionario" in *Tres poetas católicos*, Océano (1997), p. 184

[594] Pedro Castro, "Álvaro Obregón, el último caudillo," *Polis*, vol. 2, no. 3 (2004), p. 215

[595] Jürgen Buchenau, *Plutarco Elías Calles and the Mexican Revolution*, Lanham, Rowman and Littlefield (2007), p. 115

> full of requests that always invoke the public interest, but that always touch small private interests. All social classes are mixed in those files.[596]

Still, it was also a State in which many political forces with conflicting interests converged. Thus, far from being a monolithic bloc, the State was then "a set of often conflicting forces whose base rested on the Cromista union movement, the army, the bureaucracy, the government and the regional forces, forces that manifested themselves through of strong men: Luis Morones, Joaquín Amaro, Álvaro Obregón, Saturnino Cedillo, José Guadalupe Zuno, Colunga, Gonzalo N. Santos, etc." [597] A precarious system of checks and balances that only partially reflected the provisions of the constitutional order adopted in Querétaro a few years ago.

Yet, in order to translate Calles' political vision from the realm of abstraction to the provinces of reality, important decisions were made in the first years of the new administration that ensured the continuity of the national reconstruction effort started in 1920 by Obregón. As a result, Calles launched an ambitious program that blended "measures designed to improve the fiscal situation of the state with the professionalization of the army, nationalist efforts to control natural resources, and the promotion of economic development, education, and social welfare."[598]

The revolutionary State thus sought to establish the bases of a tangible domain over key areas of national life granting to its efforts a central ideological component fuelled by a nationalist rhetoric. However, the project that the lords of Sonora imagined for the future of Mexico soon collided with the worldview of those citizens unwilling to support the promise of modernisation entailed by the Mexican Revolution. Central to the construction of the new order was the notion that the national fact and the advent of the nationalist State "stipulates a new monotheism, an absolute power to direct things mental."[599] It was for this reason that the new State collided directly with the only entity that could dispute that hegemony: the Roman Catholic Church.

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[596] Jean Meyer, "The Conflict Between State and Church in Mexico (1925-1938) and La Cristiada (1926-1929)" in Vyacheslave Karpov and Manfred Svensson (eds.), *Secularization, Desecularization, and Toleration*, Cham, Palgrave MacMillan (2020), p. 176

[597] Enrique Krauze, Jean Meyer, and Cayetano Reyes, "El Estado y sus protagonistas" in *Historia de la Revolución Mexicana: Periodo 1924-1928*, Mexico City, El Colegio de México (1977), p.

[598] Buchenau, Op. cit. p. 115

[599] Meyer, Op. cit., "The Conflict Between State and Church…", p. 178

The Revolution and the Church: a question of thrones and dominions

The second half of the Mexican nineteenth century was marked by a process of political rearrangement that ultimately allowed the faithful to collaborate in the national construction enterprise that began in the 1860s, when the separation of Church and State became an irreversible political fact. By the end of the century Roman Catholic laymen interested in taking part in the civic life of the country found a source of inspiration in the content of the encyclical Rerum Novarum, made known by Leo XIII in 1891.[600] Many of those who subsequently took up arms after 1926 previously collaborated in civic associations determined to influence the political future of Mexico under the banner of «Social Catholicism».[601] However, after the coup of 1913 the Church was viewed with mistrust by the protagonists of the revolution. The National Catholic Party, which was established in 1911 and initially supported Madero's nomination as presidential candidate, did not know or could not distance itself from the military government that Victoriano Huerta led at the bloodiest moment of the civil war, when Carranza assumed the leadership of the Constitutionalist Movement.[602] For revolutionaries of all stripes, the Church was guilty of having collaborated with a declared enemy, against whom they vouched to be inflexible.

In this context, the military triumph of the Constitutionalist Movement was a first serious setback for the Church and its many civic and political associations. The debates held as of 1916 in the framework of the sessions of the Constituent Congress show the degree of virulence that the question of Church-State relations aroused among the representatives gathered in Querétaro.[603] In total, a set of five constitutional articles expressed the determination to restrict the place that the Roman Catholic Church had within the Mexican society severely: first, the legal personality of the Church was denied and its right to have real estate was revoked; second, priests were denied the right to vote and religious institutions in general were excluded from the possibility of taking part in educational and cultural initiatives; finally, worship was only allowed inside churches, which

[600] Cecilia Adriana Bautista, "Hacia un nuevo pacto: Capitalismo, organización católica y control social" in *Las disyuntivas del Estado y de la Iglesia en la consolidación del orden liberal, México, 1856-1910*, Mexico City, El Colegio de México (2011), pp.361-377

[601] On this issue see "Antecedentes lejanos del movimiento social y político de los católicos en México (1895-1914)" in Olivera Sedano, Op. cit. pp. 25-48

[602] Juan González Morfin, "Entre la espada y la pared: el Partido Católico Nacional en la época de Huerta," *Anuario de Historia de la Iglesia*, vol. 21 (2012), pp. 387-399

[603] María Luna Argudín, "Labor revolucionaria y problema religioso en el Constituyente de 1916-1917: Un estudio de la dinámica parlamentaria," *Secuencia*, no. 99 (2017), pp. 65-92

in turn became the property of the nation.[604] In the years that followed the promulgation of the Constitution, the dispute between the civil authorities and the clergy was confined to the sphere of the local governments, Jalisco being one of the main scenarios of conflict between both powers.

Under the administration of President Obregón the federal government maintained an ambivalent position towards the religious question. Although the revolutionary rhetoric displayed by the Caudillo placed the Church within the camp of reaction, the truth is that Obregón —true to himself— played with the anticlerical sentiment in the same way that he had played with the demands of the agraristas or the political force of the labour movement.[605] However, under the administration of General Calles, things changed radically: the rise of those civil society organizations that had embraced the cause of Social Catholicism was viewed with suspicion by the builders of the revolutionary state. Significantly, the labour movement close to the government regarded the Catholic labour organisations as its main rivals. Therefore, when Calles assumed office that rivalry was reassumed with especial energy.

Confident of having the support of the mass structures created in previous years, President Calles launched a decisive provocation against the Church in the first months of 1925: he decided to support the efforts of those who wanted Mexico to break definitively with the Roman Curia. On February 21 of that year, a dissident priest, the presbyter José Joaquín Pérez Budar, occupied the Templo de la Soledad in Mexico City to establish there the headquarters of a Mexican Catholic Apostolic Church.[606] A storm group led by workers belonging to the Regional Workers Confederation of Mexico assaulted the temple, setting in motion a small schism that would have unexpected results for all those involved. The schism, which in fact did not involve more than a hundred people, was orchestrated by Pérez Budar with the understanding that he would have the backing of the revolutionary government, which acted believing that it could gain a lot without directly risking its own political prestige. [607]

[604] Op. cit., *Diario Oficial*, pp. 159-160
[605] González Morfín, Op. cit., p. 271
[606] Mario Ramírez Rancaño, "Un cisma religioso en pleno siglo XX: montaje y estallido" in *El patriarca Pérez*, Mexico City, Universidad Nacional Autónoma de México (2006), pp. 57-96
[607] Ibid., pp. 61-62

The response of the Episcopate was immediate: from disdain for the schismatics, it passed to general condemnation and, finally, to a tense dialogue with the federal authorities through the Ministry of the Interior, a body that formally promised to mediate between the parties in conflict. No less significant was the response of the urban laity affiliated to the many confessional organisations created by the Roman Catholics in the previous decades. [608] In a short time, members of the most important civic groups close to the Church announced the creation of a National League for the Defence of Religious Freedoms, which was formally established on March 14, 1925. The new organisation immediately received an energetic support from the Catholic Association of Mexican Youth, the Union of Mexican Catholic Ladies and the Catholic Labour Confederation, among many other groups close to the sentiment of Mexican Catholics.[609] The program of the League, which claimed to be a legal association of a civic nature, was announced that same day. The document pointed out that the religious question in Mexico was indeed a political question "from the moment in which it has had a place in the Constitution of the Republic and the public authorities have appropriated the right to legislate on it." [610] In this way, despite maintaining that the new organisation did not pursue political purposes, the program also pointed out that the purpose of the League was "to stop the enemy and reconquer religious freedom and the other freedoms that derive from it." [611]

From civil resistance to an armed struggle: the League goes to war

In the months that followed, the League set about establishing a territorial structure designed to coordinate its actions on a national scale. At the same time, the organisation called publically for reform those constitutional articles that limited the exercise of religious freedoms in Mexico. [612] General Calles's reprisals were forceful: the expulsion of foreign priests was followed by the closure of convents, schools and charitable institutions, as well as the increasingly exhaustive monitoring of the activities of the League and the adoption of increasingly strict measures by the local legislatures, aimed at regulating the pastoral tasks of the clergy in the different states of the

[608] Olivera Sedano, Op. cit., pp. 92-93
[609] Meyer, Op. cit., *La Cristiada*, vol. i, p. 62
[610] *Programa de la Liga Nacional Defensora de la Libertad Religiosa* (14 March 1925), Mexico City, quoted by Olivera Sedano in Op. cit., p. 93
[611] Ibid., p. 94
[612] Ibid., p. 96

federation. In this context, clashes between police and groups of the faithful became more and more frequent. As a result, the Archbishop Primate of Mexico called for the general mobilisation of the Mexican Roman Catholics in defence of their rights.

In response, in January 1926 Calles sent Congress an initiative to reform the Criminal Code in order to give effect to the provisions of the different constitutional articles related to the religious question. Without encountering significant opposition in the Congress, the new initiative — informally known from then on as the "Calles Law"— was approved on July 2, 1926.[613] At the end of that same year, the President sent an additional initiative to regulate article 130 of the Constitution in matters of worship, which was published in the Official Gazette on January 18, 1927. According to Presbyter Juan González Morfín, the most controversial aspect of this last provision "was the duty of the bishops to register their priests with the government so that it could determine how many and who could exercise their ministry."[614] Therefore, a limit that had never been crossed before was indeed crossed: the one that had guaranteed that the State did not exercise any influence over the internal direction of the ecclesiastical government.

However, the decisive turning point occurred in July 1926. The publication of the Calles Law generated adverse responses among Mexican Catholics and their organizations. Once again, the high ecclesiastical hierarchy took an open position against the provisions of the new legal code. In a Collective Pastoral signed on July 26, the bishops decreed "that as of July 31, the day the Calles Law came into force, all acts of public worship that required the presence of a priest were suspended." [615] "The Church does not have armies to defend its rights from the invasions of civil power, and for this reason, it prefers to withdraw from its temples, rather than give up on its immutable principles," pointed out a piece of propaganda then spread by activists close to the cause defended by the bishops.[616] Previously, an Episcopal Committee created in May 1926 with the approval of Rome sought to hold meetings with representatives of the different powers of the

[613] González Morfin, Op. cit., p. 274. Cf. with "Ley reformando el Código Penal para el Distrito y Territorios Federales sobre delitos del fuero común y delitos contra la Federación en materia de culto religioso y disciplina externa," *Diario Oficial de la Federacion* (2 July 1926) reproduced by Guillermo F. Margadant in *La Iglesia ante el derecho mexicano*, Mexico City, Miguel Ángel Porrúa (1991), p. 301
[614] Ibid., p. 275
[615] Loc. cit.
[616] Impresos cristeros (n. d.), Centro de Estudios Históricos de México, fund clxxxii, archive no. 3 quoted by Yves Solis Nicot, "México y sus campanas: la suspensión del culto de 1926" in *Experiencia religiosa e identidades en América Latina*, San José, Editorial DEI (2013), p. 181

State to safeguard, with little success, those freedoms that Catholics considered essential to guarantee the practice of their religious faith. [617] In August, the Military Attaché of the United States Embassy in Mexico summarized the outcome of this episode before his superiors, pointing out that on July 31 the Mexican government "took possession of the churches throughout most of the Republic," placing its legal custody "in the hands of committees of citizens named by the municipal authorities." [618]

The beginning of the boycott was announced for October 31, 1926, the day on which members of the Catholic Association of Mexican Youth mobilized to circulate propaganda sheets explaining the reasons for their actions. "Carry out the boycott, as it exposes neither life nor home. It is a legal and pacific arm, but of decisive results, in order to win religious freedom," noted one such pamphlet, distributed in Mexico City. The same document also made a call to challenge the power of the Regional Workers Confederation of Mexico, denouncing the way in which that workers organisation had conspired against Mexican Catholics. "The Catholics will kill the CROM by boycotting it. Do not buy from stores, establishments or industries having CROM personnel," concluded the document.[619] In response to this and other initiatives, the government ordered that the members of the Directive Committee of the League be imprisoned: Rafael Ceniceros y Villarreal, René Capistrán Garza and Luis G. Bustos, amongst others, were thus imprisoned. [620] Anticipating that this would happen, the Committee took steps to allow other militants to take over the leadership of the League, which in fact happened when the members of the new Committee were also detained. Finally, a third Committee headed by Miguel Palomar y Vizcarra, Rafael Ceniceros and Luis G. Bustos, was established already in clandestine way.[621] Among the League leadership, Rafael Ceniceros y Villarreal stood out as a former and prominent member of the National Catholic Party, recognised for his integrity and patriotism. [622] In the years to come all these men were to play a prominent role in the uprising of Mexican Catholics.

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[617] Olivera Sedano, Op. cit., pp. 99-102, 104-105
[618] Edward Davis, "Freedom of religious belief and practice: Attitude of Government toward," Report no. 1033/2600 (13 August 1926), p. 2
[619] Ibid., p. 2
[620] Olivera Sedano, Op. cit., p. 109
[621] Meyer, Op. cit., *La Cristiada*, vol. i, p. 57
[622] "Rafael Ceniceros y Villarreal, jurist, poet, scholar, Catholic governor of Zacatecas, had been a militant of the Catholic Party and later of the National Republican Party," points out Meyer. "A man of integrity, good and naive, and a man of faith and action, he was in prison 14 times between 1914 and 1926." Loc. cit.

While this was happening in the country's capital, rumours began to spread like wildfire through the prairies of the Mexican countryside. In the Altiplano, as in the Bajío, the Catholic cult was part of an almost intuitive understanding of social reality and community life, so the announcement of its suspension was received with shock and indignation. [623] Rural people hailing from those rich provinces found that in reality they had little to do with the modernising design coming from Mexico City. "State and country are not confused: these people do not believe that Mexico is only the work of the State, nor that their duty is to facilitate the task of the Sate. They don't have any abstract image of the State nor of the Church," concludes Jean Meyer.[624] Rumour had it that the government headed by General Calles was responsible for what happened. Two days before the suspension began, an elderly man was shot in Puebla on the orders of one of the generals loyal to the government "for having committed the crime of having a sign in his store window that said 'Long live Christ the King!,' a formula already considered to be seditious, and future war cry of those whom the government, out of mockery, was going to call 'Cristeros'." [625] The story of events like this spread quickly among the communities, now afraid to express their devotion openly. Consequently, new rumours indicated that groups of rebels have already formed in the mountains of western Mexico to defend the cause of Christ. Like that river evoked by Eliot in *The Dry Salvages* —"a strong brown god —sullen, untamed an intractable"— the Cristero uprising once again overflowed the waters of history at a time when the bridge builders —the strategists led by General Calles from Mexico City— were preparing to take the next step in the great process of national reconstruction that began in the summer of 1920. Almost forgotten, wrote Elliot —"ever, however, implacable"— once again the river violently claimed what was its own.[626]

The Cristero insurgency as a strategic challenge for the Mexican revolutionary State

Every insurgency is, fundamentally, an act of political rebellion against the established order, whatever it may be. At the same time, each insurgency is also a reflection of the society in which it has arisen.[627] In this sense, the uprising that shook western Mexico at the end of 1926 was

[623] Ibid., pp. 95-104
[624] Meyer, Op. cit., "The Conflict Between State and Church…" p. 178
[625] Meyer, Op. cit., *La Cristiada*, vol. i, pp. 100-101
[626] Elliot, Op. cit., p. 42
[627] David Betz, "Insurgency and Counterinsurgency" in *The International Studies Encyclopedia*, London, Wiley-Blackwell (2010), p. 16

the outcome of a process that articulated the discomfort of a series of communities that considered themselves aggrieved by the decision adopted by the revolutionary government established in Mexico City. Defenders of a traditional social order that had historically been alien to the modernisation process promoted from the country's capital, the new insurgents soon demonstrated the strength of their convictions. On this occasion, the rebels were not the generals dissatisfied with the regime, always ready to drag with them those military units under their command; nor were they the organised workers of the big cities or the small groups of professional revolutionaries who in other societies appealed to the gospel of violence to change the kingdom of this world. "In the blink of an eye, the fields of the west were filled with groups that sing: '*Troops of Jesus, follow his flag, let no one lose heart, we are going to war*,'" historian Luis González y González noted some decades later when referring to what happened in San José de Gracia, a parish located in the northeast of Michoacán state subject to the tensions created by this conflict. [628]

As a result, and "to the astonishment of the rationalist authorities, unable to foresee that implacable dialectic, the uprising was completely different from traditional agrarian or political movements." [629] It was, fundamentally, the women and men of the countryside, who decided to resort to arms to defend a way of life that was closely related to a sacred order located outside the official imaginary of the Revolution:

> The State, convinced that its controversy was still with the Church, suddenly meets the Catholic people of Peter the Hermit. In a crucial moment, the people realize that they are entering a new world, that they have made an irreversible leap. In the blink of an eye, a new and tremendous truth emerges, moments are seized, decisions made, and actions take place which cannot be reversed. When it gathers to occupy the municipal palace, the crowd knows perfectly well that the army will have to come, and that it will have to kill.[630]

In this way, the civil resistance promoted in the large urban centres by the laity was soon surpassed by the popular uprisings that took place in the Mexican countryside. Since the early days of 1927, the force of these uprising gave political content to the call for a general insurrection, a call that the leadership of the National League for the Defence of Religious Freedom rapidly adopted, equally

[628] Luis González, *Pueblo en vilo*, Mexico City, Fondo de Cultura Económica (1999), p. 122
[629] Meyer, Op. cit., "The Conflict Between State and Church…", p. 1832
[630] Ibid., p. 183

surprised by the evolution of the events on the ground. [631] At the same time, what happened also took the authorities by surprise, precisely when they were striving to lay the foundations for a hegemonic story conceived to justify their political domination in the long term. However, on this occasion the character that the war took on was that of an insurgency that soon generated a response from the revolutionary government led by General Calles: the development of a «counterinsurgency» model that in the long term would have to exercise a wide influence on the strategic culture of the Mexican State. [632]

In the manner of a modern insurgency: the Cristero challenge

According to Alicia Olivera, the call for a general insurrection was the expression of a decision that was made autonomously by the leadership of the League during the summer of 1926 in order to respond to the intransigence of the authorities. [633] More recently, David Kilcullen has suggested that guerrillas arise almost by accident where dedicated groups of militants settle in aggrieved rural communities for the purpose of cultivating ties that will eventually lend political sustenance to the call for insurrection. [634] However, as far as the war of the Cristeros is concerned, the work of Jean Meyer has refuted this approach: the outbreak of the uprisings that took place at the end of 1926 was not the result of the work of League agents in the communities of western Mexico; rather, it was the outcome of autonomous initiatives that expressed an intuitive response to the announcement of the public cult suspension shortly after it was announced by the ecclesiastical authorities in July of that year. [635] In other words, it was not the initiative of the League what brought insurgency to the countryside but rather the opposite: the existence of a rural insurgency that had arisen more or less in a spontaneous fashion was what made the League

[631] Op. cit. Meyer, *La Cristiada*, vol. i, p. 120

[632] Understood as a response to the political challenge represented by the development of an insurgent movement, a «counterinsurgency» campaign only makes sense to the State in terms of its strategic utility. And yet, in the absence of an agreed-to definition, "counterinsurgency tends to be understood according to its implementation," notes David Ucko. Ultimately, "counterinsurgency, like insurgency, is not a strategy, but a description of a strategic end-point, either to mount or defeat a threat to the established authorities. The more difficult questions of whether to embark on such a campaign, or how to prosecute it, are strategic-level questions that counterinsurgency doctrine —operationally oriented as it is— cannot answer." David H. Ucko, "Whither counterinsurgency: the rise and fall of a divisive concept" in Paul B. Rich and Isabelle Duyvesteyn (eds.), *The Routledge Handbook of Insurgency and Counterinsurgency*, London, Routledge (2012), pp. 69, 71

[633] Olivera Sedano, Op. cit., p. 130

[634] David Kilcullen, *The Accidental Guerrilla: Fighting Small Wars in the Midst of a Big One*, Oxford, Oxford University Press (2009), pp. 34-38

[635] Meyer, Op. cit., *La Cristiada*, vol. i, p. 92

leadership to consider the conquest of power by armed means.[636] Only then the League ceased to be an entity of the Mexican civil society and became the visible head of a true insurgency. In this way, by the end of 1926 the leaders of the League faced "the problem that would arise forty years later for the Latin American left: that of resorting to armed struggle to conquer power."[637]

And indeed, in its race to conquest power, the League established a politico-military structure that largely anticipated the one that would later be adopted by many of the armed movements of the left in Latin America. After deciding on clandestine action, the leaders of the League established a Special (or War) Committee conceived to grant a strategic direction to their efforts.[638] By then the Directive Committee had divided the national territory into eleven zones that grouped the many local and regional centres of the League in a more orderly way.[639] At the same time, the Committee appointed Regional Delegates who were invested "with military and civil powers, to control or apply its instructions."[640] Under the presidency of the eminent Rafael Ceniceros y Villarreal, the Directive Committee handed over the presidency of the Special Committee to Bartolomé Ontiveros and, later, to Luis Segura Vilchis, "a remarkable, cold-blooded and effective man." It was Segura Vilchis who allowed the Committee to establish six new sections to make its action more effective: a Special Section (dedicated to espionage and direct action), a Military Operations Section (which aspired to maintain direct communication with the combatants on the ground), a Financial Section and, finally, a Relief Section (which sought to provide logistical and operational support to the struggle).[641] Finally, these efforts were accompanied by a pretence of politico-military centralisation that sought to place under a single governing body the efforts made by all the Mexican Catholic insurgents up to that moment. As a result, many clandestine organisations

[636] Ibid., p. 50
[637] Loc. cit.
[638] The following bodies depended on the Directive Committee of the League: (a) a Secretariat in charge of the press, (b) a Special or War Committee, (c) the different Regional Delegations established in the national territory and (d) an arm abroad —the organization VITA-Mexico or International Union of All Friends of Mexico— which carried out propaganda and financing tasks with the endorsement of the Holy See, the Mexican Episcopal Commission in Rome, and the Belgian Catholic Youth Association. Ibid. Meyer, pp. 56-63. As for VITA, which was in fact the European branch of the League, see Franco Savarino, "El anticlericalismo mexicano: una visión desde Italia" in Franco Savarino y Andrea Mutolo (coords.), *El anticlericalismo en México*, México City, Miguel Ángel Porrúa Editores (2008), pp. 550-52
[639] In total, 29 regional centres and 127 local centres were established. Additionally, a delegation was established in the Federal District, "divided into demarcations that more or less followed the official order." Olivera Sedano, Op. cit., pp. 97-99
[640] Meyer, Op. cit., *La Cristiada*, vol. i, p. 56
[641] Ibid., p. 59

such as the Popular Union or the Women's Brigades of Saint Joan of Arc were notionally placed under the authority of the League leadership in Mexico City.[642]

That said, it would be a mistake to assume that the League's performance actually worked as effectively as these structures promised.[643] In fact, the promise of unity anticipated by its Directive Committee was never fully fulfilled, since the Catholic insurgency of those years ended up fractured by a phenomenon that in the second half of the century also broke the cohesion of the leftist Latin American insurgencies: the division between the fighters who came from the countryside and those who hailed from the cities.[644] For the majority of the Cristero soldiers, sons of a rural world alienated from the realities of large Mexican urban centres, the behaviour of the members of the Catholic Association of Mexican Youth was foreign to them, if not incomprehensible.[645] However, these young university students from the Mexican middle classes were the main support of the League when the efforts of the Special Committee required to be translated into effective action.[646] Yet, when their efforts led them to establish contact with combatants from rural communities who had previously taken up arms to combat the Calles government, the outcome was seldom successful. "Thirty years before the Castrista youth, the urban youth of the Catholic Association of the Mexican Youth collided with the mistrust of the peasants, their resistance to a project that was foreign to them, and their hostility to a culture that did not respect them," wrote Meyer at the beginning of the decade of 1970, when many young revolutionaries moved by an ideological zeal very different from that of the Cristeros launched themselves into armed struggle in Mexico and many other Latin American nations.[647]

In fact, the real struggle took place in the Mexican countryside. Therefore, in order to measure the magnitude of the challenge, it is important to be aware of the true scope of the insurrection: if

[642] Ibid., p. 60
[643] Ibid., pp. 61-65
[644] Many guerrilla movements of that period were indeed "attempts by revolutionary intellectuals to form class alliances with peasants against those whom one or both parties define as enemies." Timothy P. Wickham-Crowley "Who Are the Guerrillas?" in *Guerrillas and Revolution in Latin America*, Princeton, Princeton University Press (1992), p. 26
[645] Children of the urban middle classes, the members of the League are more in tune with their political enemies than one might think. "Culturally and socially, the League members are the enemy first cousins of the revolutionaries, and they find themselves in a world that has nothing to do with that of the Cristeros or the Zapatistas." Meyer, Op. cit., *La Cristiada*, vol. i, p. 53
[646] Ibid., p. 64
[647] Ibid., p. 65

throughout 1926 the uprisings had been sporadic and scattered, over time the government was able to confirm that the oil stain that had ignited in the most remote communities of western Mexico it had the potential to become a tidal wave of fire. The reports sent from Mexico City to the Defence Intelligence Agency in Washington show this shift: in January 1927, the Military Attaché of the United States Embassy estimates that there are no less than fourteen regions in which the rebellion was active and a total of 2,950 combatants. By then a new uprising of the Yaqui people in Sonora had distracted a considerable number of soldiers in the north of the country. "The total actual strength of basic units of the Mexican Army on January 12 was 26,936 Infantry, 35,200 Cavalry,1,596 Artillery and 663 Aviation," the report pointed out. [648] However, these numbers had to be adjusted to reflect the federal deployment against the Yaquis, who once again decided to revolt against the local authorities of Sonora: to confront them, the government was forced to mobilise around 11,000 soldiers. Finally, to these numbers one can add also the entire officer corps, by then estimated at around 3,600 elements. Once these adjustments were made, only 38,000 soldiers remained at the government's disposal to crush the Cristeros. [649] In the opinion of the American attaché, the situation could still be defined according to the script that other rebellions had followed in previous years: as a race between a government wishing to force a decisive encounter with the rebels and the latter's expectation of finding a military leader capable of unifying them to provoke a nationwide uprising. [650]

It took a month of fighting for the attaché to realize that the new war would not follow a conventional course. "The Government," he wrote, "continues to hold its own in the suppression of rebellion, though there is much evidence to contradict the Government's claims that it is always victorious in all encounters." According to one of their sources, the leaders of the "Clerical Party" had launched "a tactical feature which will tend to keep the rebel activities alive with a minimum of loss."[651] It is worth paying attention to these words, because they account for one of the first times in which the logic of insurgency was recognized by the military analysts of both countries:

[648] Edward Davis, "Distribution of Troops: Active Operations. Campaign against rebels thought the Republic," Report no. 1334/6180-c (18 January 1927), p. 2. This figure contrasts with the calculations of Rancaño, who estimates that by 1926 the National Army had around 53 thousand elements. Op. cit. Rancaño, p. 45
[649] Loc. cit.
[650] Ibid., p. 2
[651] Edward Davis, "Distribution of Troops: Active Operations. Campaign against Rebels throughout the Republic," Report no. 1394/6180-c (18 February 1927), p. 1

> This tactical feature consists in keeping constantly in the field numerous bands of four or five well-armed men who do as much damage as possible, while the members of the larger bands of 100 and 200 men take the field only on especial call: the old Filipino "Amigo" system. In other words they are holding the front-line trenches lightly.[652]

The reference to what happened in the Philippines is remarkable, especially since it was there that the Americans waged the first of the great counterinsurgency campaigns that they were to wage throughout the last century.[653] It would not be the last time that the example of the counterinsurgency campaigns undertaken by great powers in their overseas territories would be invoked to deal with the Mexican emergency. In 1929 the Military Attaché of the United States Embassy was still referring to his country's experience in the Philippines, pointing out to the President of Mexico that the method employed in that distant archipelago was the best way to deal with the Cristero insurgents.[654]

In any case, the truth is that the scope of the insurrection was soon reflected more forcefully in the intelligence reports generated monthly at the American Embassy: in March the attaché already recognized that one of the central foci of the insurrection was Jalisco, despite the fact that combats were also recorded in Durango, Guanajuato, Guerrero and San Luis Potosí. [655] And yet, the report concluded, a reliable report from Guadalajara "states that the rebels in the state of Jalisco now number about 3000; that they are now well-armed and plentifully supplied with ammunition, and that the sympathy of the people is almost universally in favor of the rebels."[656] Exaggerated or accurate, the truth is that these figures speak eloquently about the magnitude of the challenge that

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[652] Loc. cit.

[653] After the occupation of the Philippines in 1898, the Americans had to face the forces of General Emilio Aguinaldo, who was seeking the definitive independence of his country. Beginning in November 1899, the recourse to conventional warfare used by the insurgents gave way to guerrilla warfare waged in a mountainous and rugged terrain. As a result, American detachments were surprised in a way that is indeed similar to the one described by the military attaché: a typical encounter began "when guerrillas hidden in thick bamboo alongside a trail or concealed in a mountain gorge fire at an American patrol or supply column. This first fire invariable came as a surprise. After discharging a few shots the guerrillas scattered. The entire event usually ended within a matter of seconds. Such combats were enormously frustrating to the American soldiers." James R. Arnold, "Chastising the *Insurrectos*" in *A Jungle of Snakes*, New York, Bloomsbury Press (2009), p. 29

[654] Meyer, Op. cit., *La Cristiada*, vol. i, p. 164

[655] Edward Davis, "Distribution of Troops: Active Operations. Campaign against Rebels throughout the Republic," Report no. 1450/ (22 March 1927), p. 1

[656] Loc. cit.

the revolutionary authorities had to face after 1927. By June of that year, Meyer claims, no less than 20 thousand people were up in arms. [657] In 1929, when hostilities formally came to an end, some 50,000 Cristeros remained on the warpath.[658]

In the manner of the great powers: the response of the Mexican state

Under the energetic leadership of General Joaquín Amaro, the use of the armed forces once again became a central tool of the new revolutionary State to confront its internal enemies. In this way, to confront the Cristeros, the National Army launched a counterinsurgency campaign that recreated in Mexico's national territory many of the practices that the European colonial empires had set in motion throughout the nineteenth century. As an attentive reader of the great encyclopaedias of the time, of military manuals published abroad, and of historical works relevant to the study of the art of war, Amaro was perhaps not indifferent to that school of thought that in Great Britain made possible the use of the expression «small wars» to refer to the type of campaigns that allowed the Empire to maintain order in its vast overseas domains. [659] In all of them, one element was central: the meeting of regular troops with armed irregulars willing to exploit the resulting asymmetry in their favour. [660] All in all, the doctrinal corpus that would later grant a particular status to the practice of counterinsurgency in the West was still latent when the new emergency surprised General Amaro in his office in Mexico City: T. E. Lawrence's famous essay on

[657] And yet, in spite of these impressive numbers, most of those who joined the revolt were still "operating spontaneously and disorganised, each group (from 50 to 500) on their territory, working on their land, in their war, producing their war, and often their war and their corn." Op, cit. Meyer, "The Conflict Between State and Church…", p. 186

[658] Loc. cit.

[659] At the beginning of the twentieth century, the list of examples in this regard was already eloquent. In the 1899 preface to the second edition of his work, Callwell cites "the French advance to Antananarivo and their later operations in Madagascar, the guerrilla warfare in Cuba previous to the American intervention, the suppression of the rebellions in Rhodesia, the operations beyond the Panjab frontier in 1897-98, the re-conquest of the Sudan, the operations of the United States troops against the Filipinos, and many minor campaigns in East and West Africa." Charles E. Callwell, *Small Wars: Their Principles and Practice*, London, Harrisons and Sons (1906), pp. 3, 21. For an account of the strategic significance of this type of conflict, see Brett A. Friedman, "The Strategy of 'Small Wars'" in Nathan K. Finney, *On Strategy: A Primer*, Fort Leavenworth, Combat Studies Institute Press (2020), pp. 165-78

[660] In this way, Callwell points out that the expression «small war» must consider "all campaigns other than those where both the opposing sides consist of regular troops." As a result, small wars include "the partisan warfare which usually arises when trained soldiers are employed in the quelling of sedition and of insurrections in civilised countries; they include campaigns of conquest when a Great Power adds the territory of barbarous races to its possessions; and they include punitive expeditions against tribes bordering upon distant colonies." Callwell, Ibid., pp. 21-22

guerrilla warfare would only be published in 1929, while *Imperial Policing*, the work of Sir Charles W. Gwynn that largely laid the foundations for the British approach to counterinsurgency, was not published until five years later.[661]

However, the National Army also had an immediate precedent that would guide it in consolidating its strategic behaviour during the Cristero war: the campaign undertaken by the Constitutionalist Army between 1916 and 1919 in the state of Morelos against the peasant soldiers led by Emiliano Zapata, the famous commander of the Liberation Army of the South. [662] It was there that the Army Corps of the East, under the command of General Pablo González, launched an extermination campaign that sought to punish the Southern rebels in a way that recreated many of the practices used by the colonial powers of the time.[663] Following the British precedent used in South Africa at the beginning of the century, the railway lines of this wide theatre of operations were protected by a system of *blockhouses* that sought to protect the lines of communication from the Constitutionalist forces.[664] Furthermore, in the years that preceded the arrival of General Pablo González's troops in the state of Morelos, the professional commanders of the former Federal Army also waged a bloody campaign against Zapata and other rebels, having as one of their referents the behaviour of the British troops in the Second Anglo-Boer War.[665]

These examples, which surely had not been forgotten by the commanders who were now part of the National Army, were complemented by an additional reference: that of the French experience in North Africa from the 1840s, where General Thomas Robert Bugeaud laid the foundations for a

[661] Lawrence's theses will be cited later in this chapter. As for Gwynn's work, also considered in the previous chapter, see Charles W. Gwynn, *Imperial Policing*, London, MacMillan and Co. (1939), pp. xii-417. Conceived as a manual intended to guide the British military authorities at the time of re-establishing the authority of the civil administration in their colonial possessions, this work can be considered one of the first modern doctrinal references in the field of counterinsurgency. See for instance Stanislav Malkin, "From small wars to counterinsurgency: C.W. Gwynn, 'Imperial Policing' and transformation of doctrine," *Small Wars & Insurgencies*, vol. 30, no. 3 (2019), pp. 660-78

[662] Francisco Pineda Gómez, *La guerra zapatista, 1916-1919*, Mexico City, Ediciones Era (2019), pp. 447

[663] Ibid., pp. 43-49

[664] Ibid., pp. 56-59

[665] The link with the South African experience is not accidental: starting in 1911, one of the most outstanding commanders of the Boer army, General Benjamin Viljoen, lent his services in favour of the Maderista cause. Ibid. Pineda Gómez, p. 57. As for the nexus with the behaviour of the Federal Army, the link is found in the advice given by the British Minister in Mexico, Lionel Carden, to the government of General Huerta. On this issue consult Alan Knight, "Guerra total: México y Europa, 1914," *Historia Mexicana*, vol. lxiv, no. 4 (2015), pp. 1609-1610, 1634-1635

way of waging war that found in the *razzia* one of its fundamental points of support. [666] Using precedents that rest in the warring traditions of the societies of the region, General Bugeaud prepared to wage a punitive campaign against those tribal communities that did not bow to the French occupation of Algeria.[667] "Such razzias with their indiscriminate slaughter not only produced the desired terror, usually the razzias also yielded a rich booty in livestock and produce, a welcome alternation to military rations."[668] By resorting to such practices, the French general laid the foundations for a model that gave the population a central place in the logic of counterinsurgency. How to impose the political will of the occupying forces on a population that did not respond to the logic of existing urban life in a modern industrial society? The answer to this question was formulated by one of Bugeaud's collaborators: "There's only one means, the razzia, a *coup de main*, which hurls a force upon a population with the rapidity of a bird of prey, stripping it of its riches, its herds, its grains —the Arab's only vulnerability."[669] As a result, points out Rid, military operations "became centered on the population out of necessity, because proper targets were not available."[670] Over time, this approach made possible a counterinsurgency model in which control of the population was privileged over combat against the enemy: thanks to the work of General Joseph-Simon Galliéni in Tonkin and Madagascar, the French thus developed an model —that of the *tache d'huile* or oil stain— in which the capture of a territory had to be accompanied by the development of favourable conditions for its pacification. [671] By 1900 this position had already been formulated as part of the doctrinal corpus developed by Colonel Lyautey in the following terms: "Military occupation is less about military operations than about an organization that works." [672] In

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[666] Thomas Rid, "The Nineteenth Century Origins of Counterinsurgency Doctrine," *The Journal of Strategic Studies*, vol. 33, no. 5 (2010), pp. 727-58. Cf. with Douglas Porch, "Bugeaud, Galliéni, Lyautey: The Development of French Colonial Warfare" in Peter Paret (ed.), *Makers of Modern Strategy*, Princeton, Princeton University Press (1986), pp. 376-407

[667] "In expeditions tribes seized livestock, goods, and —more rarely— women from hostile tribes. The gist of a razzia was to attack with overwhelming force against unprepared herdsmen or settlements. Because resistance against such massive incursions was futile, the victims could flee without disgrace and without losing face—and eventually reciprocate. Loss of life was rare, but more serious tribal wars that employed the same techniques could break out as well. The razzia was, in short, an ancient and primitive tactic of mobile desert warfare." Thomas Rid, "Razzia: A Turning Point in Modern Strategy," *Terrorism and Political Violence*, vol. 21 (2009), p. p. 618-19

[668] Rid, Op. cit., "The Nineteenth Century Origins…", p. 732

[669] Louis Charles Pierre de Castellane, *Souvenirs de la vie militaire en Afrique*, Paris, Victor Lecou (1852), p. 338, quoted in Ibid. Rid, p. 735

[670] Loc. cit.

[671] Michael P. M. Finch, *A progressive occupation? The Gallieni–Lyautey Method and Colonial Pacification in Tonkin and Madagascar, 1885–1900*, Oxford, Oxford University Press (2013), pp. 56-72

[672] Louis Hubert Gonzalve Lyautey, *Du Rôle colonial de l'armée*, Paris, Armand Colin & Co. (1900), p. 6. Our translation.

other words: the success of any military occupation depends on the combined action of force and politics, as Galliéni himself stated in 1898, when he foresaw that the local population should be actively incorporated into the process of economic and administrative reorganisation that ensures the future prosperity of the newly conquered territories.

In a certain way, the decision to establish Military Operations Headquarters at the end of the great civil war of 1910 followed the orientation of this model in Mexico. In fact, the existence of territorial commands capable of acting with broad powers beyond the space formally assigned to the Mexican federated states seems to echo the measures adopted by Galliéni in Madagascar as of 1896.[673] It was there that Galliéni established a particular military institution for the first time: the *territoire militaire*, a spatial sphere of political and military coordination that, according to Thomas Rid, occupied a central place within that first French counterinsurgency model. Quoting Lyautey himself, Rid points out that the central purpose of these territorial units was to allow the coordination of military operations in order to achieve a common goal. [674] However, in Mexico the requirement to create well-governed territorial areas would be indefinitely postponed in order to grant priority to the first French precedent: the *razzia*, understood as an exercise in armed violence designed to punish rebel populations by making them see the futility of their resistance. Thus, at the end of September 1915, General Pablo González announced that the main objective of the Eastern Army Corps in Morelos would be to exterminate the existing rebellion in that state by resorting to "annihilation expeditions." [675] This is a precedent that Amaro would not forget when confronting the insurgents who took part in the Cristiada.

Finally, to this precedent was added another of particular importance for the Mexican experience: that of the policy of «reconcentration» of populations tried by General Valeriano Weyler in Cuba in the years that preceded the 1898 war between Spain and the United States. [676] Indeed, at the end of 1895, General Weyler presented in Madrid a plan to contain the Cuban insurgents made up of three components: (*1)* creating mobile columns to destroy the rebel parties on the ground, *(2)*

[673] Finch, Op. cit., pp. 168-223
[674] Rid, Op. cit., "The Nineteenth Century Origins…," p. 748
[675]"Importantes declaraciones del general González a la prensa," *El Pueblo*, Veracruz (27 September 1915) quoted by Pineda Gómez in Op. cit., p. 43
[676] Edward J. Erickson, "Introduction" in Edward J. Erickson (ed.), *A Global History of Relocation in Counterinsurgency Warfare*, London, Bloomsbury Academic (2020), pp. 1-16

strengthening the *trocha* system (a set of fortification lines made up of *blockhouses*) that had previously allowed dividing the island's territory into sectors, and *(3)* proceeding to re-concentrate the population to thus deny all sustenance to the insurgents.[677] "By relocating the population, Weyler would be able to better protect Spanish loyalists, reduce the political demands on the Spanish army to protect every plantation and village while simultaneously denying the labour and rations that rural Cubans might provide local insurgent groups."[678] This set of measures, which ideally should have allowed the restoration of order in Cuba, generated a high moral and political cost for the Spanish authorities: the reconcentration of just over 300,000 civilians was a logistical and health challenge that turned out to be insurmountable. Under the complex circumstances that prevailed in Cuba at the time, no less than 55,000 civilians died as a result of a process that only aggravated the precarious living conditions of many of them.[679] However, what happened in Cuba established a model that would be emulated by many of the counterinsurgency campaigns that were subsequently launched in other parts of the world. In the middle decades of the last century, Mexico would not escape this trend. Already at the end of 1915, the press close to Constitutionalism indicated that the government would concentrate in the most important towns of the state of Morelos "all the neighbours who demonstrate from the beginning that they have no dealings with the insurgents. Once this has been achieved, the campaign will continue, with the certainty that only the enemy remains in front who must be annihilated."[680] Several years later, Ben Fallaw notes, General Eulogio Ortiz wrote a letter to General Amaro in which he compared the Cristeros to the Zapatistas. The fact is not strange: from 1927 Ortiz became one of the most outstanding architects of the counterinsurgency campaign in the state of Zacatecas.[681]

With these precedents in mind, General Joaquín Amaro launched a counterinsurgency campaign against the Cristeros that recreated many of the provisions made by the great powers in their overseas territories. Jean Meyer described the mechanics of the campaign in the following terms:

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[677] Mark Askew, "War answered with war: The Spanish in Cuba" in Ibid. Erickson, p. 66
[678] Ibid., pp. 66-67
[679] Askew estimates that this figure could reach a higher range estimated at 170,000 deaths, equivalent to 10 per cent of the existing population on the island before the start of this campaign. Ibid., p. 76
[680] "La concentración de la gente pacífica se hará en varias poblaciones," *El Demócrata*, vol. ii, no. 389 (25 December 1915), p. 2. I owe this reference to the estimable work of Professor Francisco Pineda Gómez.
[681] Ben Fallaw, "Eulogio Ortiz: The Army and the Antipolitics of Postrevolutionary State Formation, 1920-1935" in Ben Fallaw and Terry Rugeley (eds.), *Forced Marches*, Tucson, The University of Arizona Press (2012), p. 142

> Amaro decided to organize the "concentrations", a necessary prelude to the raids by the federal columns. The principle was simple: a period of a few days or a few weeks was set for the civilian population to evacuate a certain perimeter and go to take refuge in a series of planned locations. After the deadline, anyone found in the red zone was executed without trial. The columns seized crops and flocks, burned pastures and forests and slaughtered by machine gun the flock that could not be taken by train.[682]

The measure, adopted in Colima, Durango, Jalisco and Michoacán in general, was also practiced in large regions of Guanajuato, Guerrero, Querétaro and Zacatecas, causing "untold suffering to the affected populations."[683] Suffering that, on the other hand, became an embezzlement opportunity for many of the commanders who took part in the campaign: although the troops behaved in these rich provinces as an occupying army, the generals did not miss the opportunity to do business in the context of the campaign. Accordingly, when General Maximino Ávila Camacho replaced General Ortiz in Zacatecas, the former's men not only dedicated themselves to kill insurgents or looting the towns, they also seized large quantities of cattle with the intention of reselling it.[684]

Unfortunately, Ávila Camacho's behaviour was not the exception, but the rule: in Jalisco, General Jesús María Ferreira did not act differently in those years. Once the raids were over, the loading of cattle on military trains to Texas or Mexico City became a huge operation that left large profits to commanders like Ferreira. "Anything that could be transported was taken, the rest was destroyed," Meyer concludes.[685] According to Marco Appelius, many generals were interested in perpetuating the "anticlerical campaign," since it had granted the Chiefs of Military Operations a new opportunity to enrich themselves and increase their political influence. [686] Extreme cruelty exercised against the insurgents, venality, corruption and lack of scruples in relation to the defence of their own interests, such was the behaviour of many of the commanders who made possible the reconcentration policy rehearsed in those years in the western provinces of Mexico.

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[682] Meyer, Op. cit., *La Cristiada*, vol. i, p. 164
[683] Loc. cit.
[684] Fallaw, Op. cit., p. 143
[685] Meyer, Op. cit., *La Cristiada*, vol. i, p. 167
[686] Mario Appelius, *El águila de Chapultepec*, Barcelona, Maucci (1928), p. 261 quoted by Meyer in Loc. cit.

Perhaps for this reason, throughout 1927 the counterinsurgency campaign launched by Amaro gave partial results and, to a large extent, became a counterproductive undertaking.[687] The *razzias* recreated in Mexico the punitive use of the military instrument, but they omitted a central component of the French counterinsurgency model that by then had already been postulated by Galliéni and Lyautey: the demand to establish in the spaces reconquered by the government an administration capable of granting effective economic and political advantages to the population.[688] On the other hand, the Cristero uprising also recreated in Mexico the conditions that T. E. Lawrence recognized in his 1929 essay on the Arab Revolt of 1916: the impossibility for the belligerents to wage a decisive battle to force a definitive resolution of the conflict.[689] According to the military text books, he noted, victory could only be purchased by blood. And yet, this was a hard saying, "as the Arabs had no organized forces, and so a Turkish Foch would have no aim: and the Arabs would no endure casualties, so that an Arab Clausewitz could not buy his victory."[690] Similarly, the Cristeros also denied regular Mexican troops the chance to engage in a conventional battle like the one Amaro had fought at Ocotlán in February 1924. Since the population was the centre of gravity of the Mexican emergency, the wrongdoings committed against them by federal troops sent to western Mexico only contributed to fuelling the flames of insurrection. [691] Yet Amaro never stopped behaving like a Mexican Foch: his willingness to use force on the battlefield was actually an expression of the nature of his political convictions, linked to the cause of the revolution in which he took part from a very young age.[692] In a short time, the great Mexican military reformer

[687] Meyer, Op. cit., p. 234

[688] "Whatever the military arguments in favor of the *razzia*, its long-term effects were baleful," notes Douglas Porch when speaking of the French experience in Algeria. "Discipline was difficult to maintain when soldiers were allowed to burn, pillage, and rape. Soon attitudes hardened, sensibilities were anesthetized, and any political or military goals beyond utter devastation were lost in an orgy of brutality and excess. Op. cit. Porch, pp. 380-381. In contrast, it is worth quoting the instructions issued by Galliéni in Madagascar on May 22, 1898: "Whenever incidents of war oblige one of our colonial officers to act against a village or an inhabited centre, he must not lose sight of the fact that his first concern, once the submission of the inhabitants has been obtained, will be to rebuild the village, to create a market there, to establish a school there. It is from the combined action of politics and force that the pacification of the country and the organization to be given to it later must result." Ibid. Lyautey, p. 16. Our translation

[689] T. E. Lawrence, "Guerrilla Warfare" in Clifton Fadiman (ed.), *The Treasury of the Encyclopaedia Britannica*, New York, Viking (1992), pp. 478-490. The piece was originally published in 1929 as part of the fourteenth edition of the encyclopaedia.

[690] Ibid., p. 480. For a general overview of Lawrence's strategic behaviour consult James J. Schneider, "A Flash of Genius" in *Guerrilla Leader: T. E. Lawrence and the Arab Revolt*, New York, Bantam Books (2011), pp. 46-79

[691] Meyer, Op. cit., *La Cristiada*, vol. i, p. 271

[692] Loyo Camacho, Op. cit., p. 154

would discover that the National League for the Defense of Religious Liberties was also looking for a Mexican Clausewitz.

While this happened on the government's camp, around the summer of 1928 the League decided to acknowledge the military realities that the Cristero insurgents had faced on the ground in the previous months. In addition to the lack of ammunition, the most important of these was the absence of a figure capable of giving strategic direction to the military operations of the insurgents.[693] Several reasons pointed out to the relevance of this measure, but one was especially compelling: by virtue of the number of its combatants, estimated at no less than 25 thousand men for January 1928, exerting effective action by the armed movement would not be possible without the existence of a commander vested with the necessary authority to fulfill that purpose. [694] On the other hand, by making this decision the League also confirmed that its Special Committee was seriously considering abandoning guerrilla warfare to launch a conventional offensive against government forces. Like Amaro, the leaders of the League also aspired to cause a decisive encounter in order to destroy their enemies and force an outcome for the conflict as soon as possible. According to Elsa Cecilia Frost, the decision was also due to the desire to give the uprising a personalist dimension, this being a central feature of the strategic culture to which all the armed movements of the period in Mexico responded.[695] For this reason, the possibility of having a caudillo or a supreme chief was considered an essential requirement to ensure the definitive success of a struggle that initially rested on the initiative of local communities outside any unified national leadership. The League did not abandon its claim to set itself up as the uprising's supreme arbiter, but began to look for "a technical director, who was asked for both military competence and political obedience." [696]

[693] "What do these heroes need?" asked the editors of a report on the military situation of the Cristero movement in December 1927. And they answered: "A supreme leader who will be easy to find, but first of all, *munitions*, *munitions*, and *munitions*." To meet these needs there was only one solution: make money as soon as possible. *Situación militar de la defensa armada en 1927* quoted in Olivera Sedano, Op. cit., p. 161. Original emphasis.

[694] This number considers only those who operated directly in western Mexico. If the combatants who were outside that territorial area are included, it is possible to add around 20 thousand additional troops; that is, a total of about 50 thousand Cristero soldiers. Op. cit. Meyer, Op. cit., *La Cristiada*, vol. i, pp. 246-48

[695] Elsa Cecilia Frost, *Las categorías de la cultura mexicana*, Mexico City, Fondo de Cultura Económica (2009), pp. 215-231

[696] Meyer, Op. cit., *La Cristiada*, vol. i, p. 199

From this perspective, in the summer of 1927 the Special Committee came into contact for the first time with General Enrique Gorostieta y Velarde, a commander who had served in the ranks of the Federal Army dissolved in 1914.[697] A professional soldier trained in the classrooms of the old Military College of Chapultepec, Gorostieta rose to the rank of general, fighting brilliantly for an army that no longer existed to preserve an order of things that disappeared in the early days of 1917.[698] A supporter of Porfirian liberalism by virtue of his career and temperament, Gorostieta initially found that the cause of the Cristeros could serve an unavowed desire for revenge against those who had imposed their political will on Mexico at the end of the great civil war of 1910. [699] However, the members of the Special Committee ruled in favour of this former federal commander "after investigating his background and being sure that, in addition to being a magnificent soldier and strategist, he was a man of integrity."[700] It was said then, Olivera Sedano points out, "that he had a broad culture, great intelligence and an unbreakable will," the latter being one of the most important traits of any great military commander.[701]

Appointed initially to reorganise the insurgents operating in the north of Jalisco, Gorostieta showed a gift of command that quickly allowed him to gain the trust of his new soldiers, thus rapidly escaping from the formal ties with which the League had sought to control him from Mexico City.[702] According to Meyer, the meeting of this professional soldier with his new troops exerted a radical influence on both parties:

> The soldier and the man had been conquered by the Cristero combatant, and Gorostieta, the wise artilleryman, the career general, understood guerrilla warfare like no one before him, of which he became a notable theorist and practitioner. Gorostieta, the agnostic liberal, became, in his own way, a Christian in the midst of his Cristeros, whom he admired without indulgence.[703]

[697] Gorostieta's name was proposed by Bartolomé Ontiveros to the Directive Committee. Loc. cit.
[698] Ibid., pp. 199-200
[699] Ibid., pp. 200-201
[700] Olivera, Op. cit., p. 169
[701] Loc. cit.
[702] Ibid., pp. 170-173
[703] Meyer, Op. cit., 202-203

Therefore, something similar happened to what T. E. Lawrence experienced when he ran to meet the irregulars who led the Arab Revolt around 1916, allowing men with remarkable conviction to find a commander who lived up to their aspirations.[704] In this way, that sort of Mexican Foch that was Amaro suddenly ran into an adversary capable of acting in accordance with a strategic genius that perhaps would have deserved the praise of Clausewitz, especially to the extent that Gorostieta resorted to a «people's war» approach to confront armed contingents that behaved as occupying forces in their own country.[705] An extraordinary circumstance that did not go unnoticed by Meyer, who in the third volume of his work points out:

> It is an admirable thing to see the career officer, the brilliant student of the war schools, the scientific weapon specialist adapts to a people's war and take advantage of it even in its failures. Aware of its strengths: the support of the people, the volunteer character and the enthusiasm of the combatants; aware of its weaknesses: the lack of commanders, of money, and therefore of heavy weapons and ammunition. Strengths and weaknesses that were due to the peasant nature of the army, Gorostieta understood the need to wage a war of a certain type, linked to the social base of the movement, since the civil government and the army could not be separated. [706]

However, the possibility of successfully waging the irregular war to which Meyer refers was conditioned by the need to have competent soldiers. "Without the firm will to become disciplined soldiers, we do not have the right to shed blood, nor continue destroying property and sowing unrest," Gorostieta wrote in December 1927 in the preamble to one of the circulars that defined the reorganization of the contingents under his command.[707] As a result, Gorostieta became an enabler who galvanized the fighting efforts of the Cristeros as never before, especially since a leader who is a true enabler makes his troops believe "they can achieve goals they had never before imagined possible."[708] For the Arab leaders who fought hand in hand with Lawrence, the central purpose of

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[704] As Lawrence, the Mexican general commanded many of the virtues of a successful guerrilla leader, being empathy one of the most significant of them. This was not a small feature of his leadership for, in an insurgency, "empathy plays an especially crucial role; it places the leader inside the hearts and minds of his own men." As a result, he knows "immediately and intuitively the physical and psychological limits of his troops." Schneider, Op. cit., p.77

[705] Sibylle Scheipers, "'The most beautiful of wars': Clausewitz's Perspective on People's War" in *On Small War*, Oxford, Oxford University Press (2018), pp. 52-86

[706] Jean Meyer, *La Cristiada*, vol. iii. Los cristeros, Mexico City, Siglo Veintiuno Editores (1985), pp. 229-30

[707] Enrique Gorostieta, *Circular* (27 de septiembre de 1927) reproduced in Ibid., p. 231

[708] Schneider, Op. cit., pp. 77-78

the struggle was to create a new State in the heart of the Middle East; in contrast, Gorostieta soon set himself a no less ambitious strategic objective: to destroy the revolutionary State that had emerged at the end of the civil war. [709]

To understand this assertion, it is necessary to pay attention to the provisions that Gorostieta adopted once the League granted him the authority to reorganise in political and administrative terms the territories of western Mexico that were assigned to him in the summer of 1927. From then on, Gorostieta's work in Los Altos de Jalisco allowed the region to be divided into sectors "strategically located in order to challenge those established by the government." In each of them, the general appointed or ratified the already existing commanders, acting in agreement with the civilian authorities previously appointed by the movement. [710]

In reality, the existence of a local government in the territories controlled by the Cristeros not only evidenced the insurgents' desire to elude the authority of Mexico City; it was, above all, an effort to establish an alternative to the constituted powers that was consistent with the central motive of their political and ideological activity: to restore the way of life that the project of the Revolution had endangered in the previous years. Therefore, in those territories directly controlled by the Cristeros the authority of the municipal governments was restored in accordance with the beliefs of those who had risen up to defend God's homeland. The League, on the other hand, appointed governors in these ample territories, and yet the Cristeros seldom observed the commands of an organisation whose power was reduced to a mere moral influence once it clashed with the realities on the ground. Thus, the League "sends chiefs, promises money and supplies, but nothing important is achieved, except for the appointment of Enrique Gorostieta."[711]

Therefore, in the territories removed from the authority of the Mexican government, a clandestine civilian authority soon "imposed taxes, administered justice, organised the subsistence of the

[709] By promoting the insurrection of the Hashemite Bedouins of Hejaz, Lawrence used them as proxy irregulars to dismantle "the means of Ottoman governance, both in Arabian Peninsula and the Levant," notes Ian Oxnevad. In effect, "Lawrence's proxy war in the Arab Revolt linked the success of irregular warfare to the political objective of state creation". Ian Oxnevad, "Beyond a Desert Revolt: TE Lawrence's Theory of Proxy War and State Creation," *Studies in Conflict & Terrorism*, vol. 43 (2020), p. 5, 11. As for Gorostieta's intentions see Meyer, Op. cit., *La Cristiada*, vol. 3, p. 241

[710] Olivera, Op. cit., p. 172

[711] Romo Cedano, Op. cit., p. 397

combatants and inspected schools."[712] In all of those territories, the determination to establish a form of government inclined to separate the tasks of the civilian authorities from those of the military sphere was notable. In this regard, Olivera Sedano points out that one of the documents that recorded the scope of the debates held by the Mexican insurgents in the summer of 1928 insisted on emphasizing that the administrative authorities "should act independently of the military, and that the latter, in turn, should support the former." The same document also stated that the administrative authorities "should have control of the Regional Defences, in terms of police services and not in terms of military undertakings."[713]

Conclusion

According to Meyer, and according to Gorostieta's own testimony, when the movement came to an end, the thousands of men who were on a war footing in western Mexico had the support of no less than 2,000 civil servants (including mayors, judges and other local magistrates) and around 300 schools.[714] This structure rested "on the bases, geographically close, of civilians sympathisers: relatives, neighbours, countless people who supply them, hide them, feed them."[715] For this reason, Rojo Cedano points out, the Cristiada was a popular movement "not only because of the origin of its soldiers. There is a democratic organisation that goes from the selection of military leaders to civil life."[716] Unlike the National Army, conceived from the beginning as an instrument of political domination at the service of the new revolutionary State, the Cristero army was an institution that, in Meyer's words, was amongst the people "like a fish in water." An army — called "National Liberation Army" at first— that incorporated children, women and the elderly alike into its ranks, carrying out its fight "on all fronts: production, education, moralisation, health, religion."[717] In this way, and perhaps unknowingly, the Mexican insurgents set in motion a model of «people's war» that anticipated by some years Mao's work in the rural China of the period. [718]

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[712] Meyer, Op. cit., *La Cristiada*, vol. 3, p. 240

[713] *La epopeya cristera y la iniciación de un derecho nuevo*, Mexico City (1938) quoted by Olivera in Op. cit., p. 173. The book, without a known editor, compiled the work undertook in May of 1928 by the Regional Junta of Administrative and Judicial Authorities in Mezquitic, Jalisco.

[714] Meyer, Op. cit., *La Cristiada*, vol i., p. 315

[715] Romo Cedano, Op. cit., p. 397

[716] Ibid., p. 399

[717] Meyer, Op. cit., *La Cristiada*, vol. iii, p. 388

[718] In effect, as Douglas Porch has noted, a people's war "combines a strategy of popular indoctrination around a shared vision of economic, social, and political transformation that imparts the stamina to allow a

By virtue of the foregoing, it was not surprising that the members of this community of combatants sought to lay the foundations for a form of government capable of supporting the efforts of their armed struggle. In May 1928, the provisional governor of Zacatecas appointed by the League, Aurelio Robles Acevedo, summoned the civil and military chiefs of the region to hold a Regional Board of Administrative and Judicial Authorities in Mezquitic, Jalisco.[719] There, the representatives of the movement took on the task of drafting a General Ordinance conceived to recreate many of the traditions of local government that already existed in Mexico, although now under the political and ideological purposes of the Cristiada. Accordingly, the document not only underlined the need to establish clear borders between the attributions of the administrative, judicial and military authorities, but also highlighted the need to preserve the autonomy of the municipal government, which was entrusted with the direction of the «defences» or regional militias when they were not on campaign. In doing so, it was recognized that these had, in reality, "a double character: that of armed forces for the campaign and that of police forces to keep order and decorum in their respective municipalities."[720] In this way, the content of the Ordinance, as well as the interventions of Acevedo and several other civil officials gathered in Mezquitic, such as the mayor of Monte Escobedo, rested largely on an intuitive interpretation of the old militias traditions of Mexico, now adapted to respond to the needs of the Cristero movement.[721] In fact, Acevedo's warning rested on a denunciation of revolutionary militarism and the need to take energetic measures to make possible the exercise of civilian authority over the areas liberated by the Cristeros.[722] "Mexico needs a fast reconstruction; therefore, it is urgent to rebuild while controlling the homeland. Yes, fighting and organising; fighting and moralising; fighting and governing," Acevedo would point out in one

people, however defined, to apply tactics of mobile and guerrilla warfare over a prolonged period against a militarily superior enemy." Douglas Porch, *Counterinsurgency*, Cambridge, Cambridge University Press (2013), p. 97

[719] Previously, Acevedo assumed command of the "Valparaíso" Regiment in the same region. Over time, he took command of the Quintanar Brigade, which operated in nine large municipalities of Zacatecas which removed from the authority of the central government since the beginning of the uprising. Meyer, Op. cit., *La Cristiada*, vol. iii, p. 135

[720] *Ordenanza General*, Capítulo vi. De las defensas regionales, art. 37 (June 5 1928) reproduced in Meyer, Op. cit., *La Cristiada*, vol. iii, p. 187

[721] Indeed, it is not difficult to see in all this the echo of the remote Cadiz-inspired constitutional framework adopted in Mexico before the civil war of 1910. When referring to regional defences, article 38 of the Ordinance reiterates what was already stated in the previous article, pointing out that "As armed bodies they report directly to the military chief of the region; and as police forces they report directly to the municipal president". Ibid., p. 187

[722] Ibid., pp. 137-39

of his interventions, speaking as any insurgent truly interested in conquering hearts and minds would. In doing so, he clearly revealed the behaviour of the insurgency of which he was a part. "The military advance a little, they control a town and the *organisers* go there to fulfil their mission; to establish a government, to create guarantees and to impart them to everyone", he added. [723]

Finally, on October 28, 1928, the League granted Gorostieta the supreme command of the Cristero forces, as Military Chief of the "Liberation Movement." That same day the general released a manifesto in which he summarised the scope of the movement, pointing out that its central purpose was to recover freedoms taken by the tyranny of Plutarco Elías Calles, "especially those concerning religion and freedom of conscience." [724] Anticipating what Elsa Cecilia Frost would point out several decades later on this issue, the document also underlined that the lack of a leader and a well-conceived program of action had so far delayed the triumph of the movement. No less important was the call to return to the original text of the Constitution of 1857, in the understanding that it better recognised the freedoms denied by the constitutional order established at Querétaro in 1917. The manifesto also recognised the importance of the agrarian question, as well as the decisive contribution of Mexican women to the war effort carried out by the insurgents: "a powerful and decisive agent in moments of defence, she has every right to continue developing her vigorous and resolute saving action, when the time of national reconstruction comes," Gorostieta pointed out. Therefore, he concluded, "it is fair that women can cast their vote when it comes to deciding the fundamental points of the life of the nation and freedom."[725] On this, as on so many other issues, the Cristero' program was close to many of the proposals previously held by the militants of the National Cooperatist Party, dissolved four years earlier after the defeat of the Delahuertista Rebellion.

Significantly, the manifesto concluded with the exposition of fourteen points that aspired to give an effective content to what was stated in the preamble drafted by Gorostieta, thus establishing

[723] Ibid., p. 138. Our emphasis.
[724] The first version of this manifesto was published on August 4, 1928. Enrique Gorostieta, "Manifiesto a la Nación, lanzado por el Jefe Supremo del Movimiento Militar, General Enrique Gorostieta", Los Altos, Jalisco (4 August 1928) reproduced in *Planes en la Nación Mexicana, 1920-1940*, vol. 8, Mexico City, El Colegio de México (1987), p. 210. In the compendium released by El Colegio de México, the editors note that the version published in October of that year included a series of additions not present in its original version. These additions, which are essential to understand the actual scope of the document, are included in the version cited by Olivera Sedano in Op. cit., pp. 174-77
[725] Ibid. Gorostieta, pp. 211-12

the bases of action to which the armed movement would be subject from that moment on.[726] The nineteenth point is of special interest because it reveals the mechanisms used by the Cristeros to legitimize the existence of their armed contingents. In this regard, the document stated the following:

> Our liberating forces are constituted in "National Guard," name that they will use officially in the future, and the motto of the "National Guard" will be "God, Country and Freedom."[727]

The intention was evident: by choosing this denomination, the Cristero armies vindicated the militia tradition to which the Constitutionalist Army also appealed years before. In any case, it was a return to the thesis that it was possible to articulate the public life of the country's local communities by resorting directly to the «armed citizens» on whom their defence rested; precisely, the thesis that the government of the Revolution discarded when it advanced towards the definitive professionalisation of the National army under the rigorous tutelage of General Joaquín Amaro. Later, in the summer of 1929, Gorostieta gave an account of this way of conceiving the armed movement that he headed in the following terms:

> The National Guard is the people themselves; it is the institution that in the past as well as in the present of this struggle has sided in solidarity with the Mexican people against the offense made to them, in a defenceless moment, by Mexican traitors. The National Guard will also watch in the future over the interests of that same people from which it was born. It has all the necessary means to do so.[728]

It is not difficult to understand why this way of characterising the Cristero soldiers was presented as a challenge to the armed institute established by the governments of the Revolution at the end of the great civil war that began in 1910. It is a narrative —that of the army defined as the people in

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[726] We are citing here the version of the document reproduced by Olivera Sedano in Op. cit., pp. 175-77. In contrast, the version published in the compendium published by El Colegio de México in 1987 only reproduces ten points: in effect, it is the first version of the document, published in August 1928.

[727] Ibid., pp. 176-77

[728] "La Guardia Nacional es el pueblo mismo; es la institución que en el pasado y en el presente de esta lucha se ha hecho solidaria de la ofensa inferida al pueblo mexicano, en un tiempo indefenso, por mexicanos traidores, la Guardia Nacional velará también en el futuro por los intereses de ese mismo pueblo de donde ha nacido. Tiene todos los medios necesarios para hacerlo." Enrique Gorostieta, Letter to the Directive Committee of the League (30 May 1929), UNAM, fol. 121, reproduced in Meyer, Op. cit., *La Cristiad*a, vol. iii, p. 241

uniform— to which Amaro's successors also resorted when speaking of the National Army throughout the last century. In an unexpected turn, the same rhetorical resource would be used with increasing insistence in the first years of the following century.

Chapter 6. Waters that found a new course: 1929 and the road towards hegemony

Plutarch tells us that Julius Caesar's death was preceded by the rumour that he would be proclaimed king. "The most open and deadly hatred towards him was produced by his passion for the royal power," wrote the historian to summarise in one sentence the many passions that the patrician's career aroused in the years that preceded the definitive decline of the republican order in ancient Rome.[729] By attempting on his life, the conspirators who met in the Senate on March 15, 44 BC were convinced that they were saving an even more precious life: that of the Republic itself, put in danger by the excessive ambition of the Roman dictator; unknowingly, these men only worked for an even greater ambition: that of Gaius Octavian, later known as Augustus.[730] The man who raised his hand to end the life of General Álvaro Obregón on July 17, 1928 AD ran with the same fate: instead of putting an end to the regime inaugurated by the last caudillo of the Revolution, José de León Toral only precipitated an outcome that for a brief moment left the future of Mexico at the mercy of Fortuna.

Unlike Fergus Kilpatrick, the Irish hero of Borges' fiction who, at the request of James Alexander Nolan, consented to die at the hands of an assassin in order to set in motion a vast theatrical performance in the service of his country, Obregón did not want or did not know how to avoid an outcome which, however, had all the qualities of a dramatic act.[731] "The idea that history might have copied history is mind-boggling enough; that history should copy *literature* is inconceivable," the Argentine writer pointed out in 1944 when he evoked the drama of *Julius Caesar*, without knowing that his words could perhaps offer some light to interpret the historical drama that Mexico witnessed fifteen years before. [732] Nor was the outcome concisely imagined in political terms by Obregón's assassin: when questioned by his captors in order to determine the state of his mental health, Toral, a young 27-year-old Catholic militant, said he did not know who Ravaillac was, thus showing his ignorance of the fate suffered by the regicide that killed Henry IV of France on May 14,

[729] Plutarch, "Caesar" in *Plutarch's Lives*, vol. vii. trans. by Bernadotte Perrin, Cambridge, Harvard University Press (1958), p. 581
[730] Mary Beard, *SPQR: A History of Ancient Rome*, London, Profile Books (2015), pp. 291-96, 339-41
[731] Jorge Luis Borges, "The Theme of the Traitor and the Hero" in *Collected Fictions*, trans. by Andrew Hurley, London, Penguin Books (1999), p. 144. This story was originally published in 1944 as part of the set of stories presented in *Ficciones*.
[732] Loc. cit.

1610.[733] Like Gavrilo Princip, who killed the only of the Habsburg willing to give a constructive solution to the Slavic question within the Dual Monarchy, Toral attacked Obregón "in the belief that the person responsible for the struggle between the State and the Church was Obregón, when Obregón was the man of conciliation."[734]

The purpose of this chapter is to serve as a conclusion to the account that began with the First Chief's call for a Constituent Congress to establish a new constitutional order for Mexico, an initiative that finally bore fruit in the early days of 1917. By focusing on what happened between the summer of 1928, when Obregón was assassinated, and the spring of 1929, when the National Revolutionary Party was finally established, the chapter seeks to close the account of the historical cycle in which some of the central features of a strategic culture driven by the needs of the authoritarian regime that prevailed in Mexico throughout the last century were forged. Thus, the chapter situates the attempt on Obregón's life within the context of the complex process of negotiation that the Mexican revolutionary state had established around 1928 with the hierarchy of the Catholic Church, pointing out that the Caudillo's death accelerated a rapprochement between the two institutions that ultimately brought the war of the Cristeros to an end.

At the same time, the chapter also seeks to highlight the fact that the call to constitute a hegemonic party must be placed within the framework of the strategic challenges faced by the Mexican revolutionary state during the previous decade. Accordingly, the initiative launched by General Calles sought to answer to a domestic landscape in which the use of armed force had become a central resource for settling disputes between the ruling class in the revolutionary Mexico of those years. In contrast, the creation of the National Revolutionary Party anticipated a trend that would be fundamental in giving content to the authoritarian civilianism that would later prevail in the country: the strengthening of the presidential institution, understood as the cornerstone of a vertical political order in which the figure of the caudillo was eventually replaced by the mechanisms of corporatism.

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[733] Jean Meyer, "El expediente médico-psiquiátrico de José de León Toral" in Carlos Silva (coord.), *Álvaro Obregón*, Mexico City, Cal y arena (2020), p. 175

[734] Enrique Krauze, Jean Meyer, Cayetano Reyes, *Historia de la Revolución Mexicana, 1924-1928*, Mexico City, El Colegio de México (1977), pp. 145-46. As for Franz Ferdinand's reformist position see Christopher Clark, *Sonámbulos*, Barcelona, Galaxia Gutenberg (2014), p. 437

At the mercy of Fortuna: the disappearance of the Caudillo and its consequences

As previously noted, Obregón was in those years a man of conciliation but, also, faithful to himself, a strategist willing to play with the conflict to divert the course of the waters in favour of his own interest. The conflict between the Church and the State gave him the reason to launch a new theatrical performance in which, predictably, he gave himself "the role of saviour, of a man forced to accept re-election for the good of the Republic." [735] However, at the beginning of 1928 the conciliation efforts promoted by Obregón ran in parallel with those carried out by President Calles, who by then had already become fully aware of the dangerous situation in which the country found itself at that time.[736] Ultimately, it would be Calles, and not Obregón, who would know how to face the waters of fortune, thus laying the foundations for a political hegemony that would last until the end of the Mexican twentieth century.

Barely a year earlier, the political expectations generated by the presidential succession were about to lead Mexico into a new scenario of conflict that could have resulted in the fall of the constituted government. By then, the political calculation of all those relevant actors in the public life of Mexico had already been oriented towards the electoral process that would take place in July 1928. Thus, the generals convinced of their merits, such as Francisco Serrano and Arnulfo R. Gómez, also joined the defiant figure of Luis N. Morones, the ambitious leader of the Regional Workers Confederation of Mexico who since 1924 figured in the Calles cabinet as Secretary of Labour, Industry and Commerce. [737] All of them were suspicious of the Caudillo, who by then had promoted a constitutional reform that, endorsed by his supporters at the Congress, reversed one of the precepts on which the legitimacy of the new revolutionary State rested: the no re-election principle.[738] Previously, in May 1926, General Francisco Serrano, the man who preceded Joaquín Amaro in the efforts to reorganise the National Army, returned to Mexico with the intention of re-joining public life. Appointed initially as governor of the Federal District, his position oscillated from then on between the loyalty due to the caudillo whom he had served arduously during the days of struggle and the possibility of taking a step forward in favour of his own political ambition, which

[735] Ibid., p. 129
[736] Yves B. R. Solis Nicot, "Asesinato o venganza de la justicia divina: La muerte de Obregón y la Iglesia Católica" in Silva, Op. cit., *Álvaro Obregón…*, pp. 237-238
[737] Krauze, Meyer and Reyes, Op. cit., pp. 111-13, and 131-151
[738] Ibid., pp. 124-29

crystallised in the following months.[739] Obregon, meanwhile, acted with studied ambiguity in referring to his own aspirations, certain that his supporters would do whatever was necessary for him.

Yet, in the summer of 1927, the rupture between the Caudillo and his former lieutenants was already insurmountable: General Arnulfo R. Gómez was nominated as a candidate for the presidency of the Republic by the National Anti-Reelectionist Party; Serrano, for his part, assumed the candidacy of the National Revolutionary Party, a political formation that in his name anticipated a future that the candidate would no longer be able to see.[740] It is evident to all that the candidates of this incipient opposition movement do not trust the impartiality of the political process: once again the arguments put forward against Carranza are echoed by those interested in exerting an influence over the nation's public opinion. In June, Serrano released a manifesto in which he openly condemned re-election, pointing out that it "inevitably brings about the death of suffrage, because it is in the essence of power to continue indefinitely when obstacles are felt."[741]

Arguments that the country has heard since the days in which Carranza sought to impose a civilian in the presidency of the Republic are repeated again, as they were repeated in 1924 by the supporters of Adolfo de la Huerta; and once again, a group of conspirators seeks to overthrow the constituted government. [742] On this occasion, however, it is said that the conspirators had conceived a spectacular coup: to surprise General Amaro in the company of Calles and Obregón on October 2, 1927, the day on which they would meet to preside over the military manoeuvres that will take place in the fields of Balbuena. In a way, the plan prefigured the plot that five decades later would end the life of President Anwar al-Sadat in Egypt.[743] "Fate is partial to repetitions, variations, symmetries," Borges would write years later when speaking of a minor conspiracy recreated in the suburbs of Buenos Aires.[744]

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[739] Pedro Castro, *A la sombra de un caudillo*, Mexico City, Plaza y Janés (2005), pp. 109-15
[740] Ibid., pp. 152-153
[741] Francisco R. Serrano, "Manifiesto a la Nación" (23 june 1927), Biblioteca México, Fondo Carlos Basave, colocación A-iii-31, reproduced in Op. cit. *Planes en la nación mexicana*, p. 206
[742] Castro, Op. cit., pp. 167-172
[743] Ephraim Kahana, Sagit Stivi-Kerbis, "The Assassination of Anwar al-Sadat: An Intelligence Failure," *International Journal of Intelligence and CounterIntelligence*, vol. 27, no. 1 (2014), pp. 178-192
[744] Jorge Luis Borges, "The Plot" in Op. cit. *Collected Fictions*, p. 307. This short story was originally published as part of *El Hacedor* in 1960.

The shadow of a conspiracy and the reasons of José de León Toral

However, the Mexican conspirators did not suffer the same fate as the Egyptians. Sadat's death was largely due to the indolence of the Egyptian intelligence services, whose oversights were costly; in contrast, the security apparatus of the new Mexican revolutionary state acted with promptness.[745] Perhaps, the lack of political resolution of the conspirators and, to a certain extent, their naivety also played in favour of the authorities. "If by chance a man does confess, he pleads his own cause and his apology is made in advance," wrote Maguerite Yourcenar many years later.[746] Thus, when at the beginning of September 1927 General Francisco Serrano confessed to President Calles his intention to use the army to dissolve the Congress, the latter knew that the government had to act with determination. Above all, he understood that Serrano's confession would allow him to take advantage of this new overflow of the waters of history.[747] Cowardice and dishonour were also added to naivety: a short time later, General Eugenio Martínez —the man the conspirators had chosen to lead the coup— met with Calles and Obregón to confess his participation in the plot.[748] In any case, it is likely that the plan was known in advance by Amaro, Calles and Obregón, who choose to "wait for the course of events to crush the enemies with one blow."[749] Previously, Arnulfo R. Gómez had asked Serrano to lead the uprising in the capital, but the latter made the mistake of delegating the responsibility of leading the uprising to others. Thus, by waiting for the outcome of events in Cuernavaca, Obregón's former lieutenant was left at the mercy of a government that would show no consideration for the rebels.[750]

Once the uprising of October 2 was averted, the fate of the conspirators was sealed: arrested in the company of some of his most loyal supporters a day later, General Serrano was escorted by a motorcade that was formally supposed to take him from Cuernavaca to Mexico City to allow him to be processed as main responsible of the plot. The group of prisoners (including two generals, a journalist and a poet) is made up of a total of thirteen people; some of them trust due process and hope that when they arrive in the capital they will be able to articulate their defence before the

[745] Kahan and Stivi-Kerbis, Op. cit., pp. 183-86
[746] Marguerite Yourcenar, *Memoirs of Hadrian*, London, Secker & Warburg (1955), p. 28
[747] Castro, Op. cit., *A la sombra…*, p. 173-75
[748] Ibid., p. 175
[749] Krauze, Meyer and Reyes, Op. cit., p. 139
[750] Castro, Op. cit., p. 181

courts.[751] To take charge of his transfer, President Calles appointed General Claudio Fox, who was accompanied by officers belonging to the General Staff of the War Minister, including the young Lieutenant Colonel Luis Alamillo Flores, one of the figures closest to General Amaro. At kilometre 48 of the federal highway that connects both cities, in a place belonging to the municipality of Huitzilac, the group of prisoners led by Serrano was executed by their captors. But they were not formally executed, in the sense in which those procedures were defined by the military ordinances; in reality the prisoners were shot under particularly atrocious circumstances.[752] "I am a division general, I have been Minister of War, I still consider myself a candidate for the Presidency of the Republic. And since this is true, as it is, and since I am willing to receive death, will you allow me to be treated as if I were a bandit?," such was the way in which Martín Luis Guzmán recreated the words that Serrano could have said at the culminating point of his existence.[753] But neither in fiction (1929) nor in reality (1927) were there considerations for the vanquished: the soldiers under the command of Colonel Hilario Marroquín unceremoniously murdered the general and killed his companions, also stealing their most valuable belongings.[754] Not without fascination, Mexican public opinion would speak shortly after the "Huitzilac Massacre," thus revealing the nature of one of the most lasting devices of the new order of things: the use of murder outside the legal channel as a measure of political control; a unique way of establishing a dialogue between society and its rulers, guided by the need to reach a truth recognized by all those interested in events with a national significance.[755]

In fact, the Cristero insurgents were amongst those who suffer the consequences of this kind of procedures. After failing in their attempt to launch an urban guerrilla campaign in the country's capital, many of the League's youngest militants, most of them members of the Catholic Association of Mexican Youth, were killed in circumstances similar to those experienced by

[751] Ibid. pp. 197-200
[752] Ibid., pp. 202-205
[753] Martín Luis Guzmán, *La sombra del Caudillo*, Barcelona, Castalia (2002), p. 319. Exiled in Madrid after the outcome of the Delahuertista rebellion to which he gave his support, Guzmán had until recently been a man very close to the protagonists of the historical drama that he later sought to recreate through this dazzling fiction. In this respect, see Rafael Olea Franco, "Reflejos de Obregón en la obra de Martín Luis Guzmán," *ConNotas*, vol. v, no. 8 (2007), pp. 9-27. For his part, Castro points out that the words Serrano actually spoke were more succinct, but no less dignified: "What are you going to do chaps? You are going to stain the weapons of the army. Do not commit, for your honor, murders." Castro, Op. cit., p. 202
[754] Ibid., p. 205
[755] On this issue see Pablo Piccato, "Homicide as politics in modern Mexico," *Bulletin of Latin American Research*, vol. 32, no. 1 (2013), pp. 104-25

Serrano. Among them stood out the group led by Armando Téllez Vargas, regional delegate of the League in the Federal District and member of the Centre for Catholic Students of Mexico City, who operated in the town of Ajusco since January 1927. By April, the group sought refuge in the vicinity of Toluca, where they were surprised by troops of General Francisco Urbalejo, Chief of Military Operations in the State of Mexico.[756] Thanks to the testimony of Manuel Bonilla, one of the young militants who were part of that group, it is possible to reconstruct what happened to them: after establishing their guilt in a summary trial of dubious legality, they were taken from Toluca to Mexico City . Close to reaching the capital, in the vicinity of La Marquesa, they were shot by order of Urbalejo, who was heading the transfer.[757]

But the Cristeros, unlike the unfortunate generals who dared to challenge the Caudillo, were more consistent and more audacious: under the direction of Luis Segura Vilchis, who at that time was responsible for the Special Committee of the National League for the Defence of Religious Liberty, they launched a series of attacks against General Obregón and other high-ranking figures linked to the administration of President Calles.[758] A first attempt sought to destroy the train that took Obregón from Mexico City to Huatabampo in early 1927; another, more effective, surprised the general's motorcade while driving on one of the most important avenues of Mexico City on November 13, 1927. The insurgents, who were part of an urban cell of the League, used a bomb that was barely dodged by the caravan in which Obregón was traveling. The persecution that followed made it possible to arrest one of those involved, who subsequently provided information that led to the capture of several well-known leaders of the League. Among those detained was a renowned Catholic priest, Agustín Pro Juárez.[759] A short time later, Luis Segura Vilchis turned himself in to the authorities, assuming full responsibility for this attack. Ten days later, the detainees were taken to the General Police Inspectorate where they were shot without prior criminal proceedings.[760]

In fact, the moral revulsion generated by such a spectacle was one of the reasons that led Toral to plan an assassination attempt against Obregón. Not only was it the case that Pro was a person close to the future assassin, but also the fact that the priest's conduct was considered

[756] Olivera Sedano, Op. cit., pp. 148-51
[757] Ibid., p. 151
[758] Meyer, Op. cit., *La Cristiada*, vol. i, p. 59
[759] Olivera Sedano, Op. cit., p. 191-92
[760] Ibid., p. 192

irreproachable in the circles of Catholic militants in Mexico City. In any case, the truth is that to justify his action, Toral also resorted to the ideological criteria that the League had adopted in relation to this issue.[761] Concordantly, Toral believed he was fulfilling a mission already envisaged in the Sacred Scriptures: to kill a tyrant who, in his eyes, was responsible for the persecution of the Catholic faithful in Mexico. At that time, according to those who questioned them, "he read or remembered the biblical passage of Judith and Holofernes and took into account the opinions of the great Fathers of the Church in the sense that it is lawful to deprive of life those who persecute religion."[762] Unlike Padre Pro, who was shot without having been brought to trial, Toral was handed over to justice to be subjected to a trial that was a cause of sensation amongst Mexico's public opinion. Finally shot on February 9, 1929, the assassin was the victim of another device that gradually shaped the new Mexican political reality: the staging of criminal proceedings designed to find those responsible for crimes committed against society or prominent figures of the regime.[763] And yet, the very day Toral was shot, another bomb attack endangered the life Emilio Portes Gil, the interim president appointed by the Congress after Obregón's death, while he was traveling by rail from Nayarit to central Mexico. Apparently, the end of the conflict was still not clear to any of the belligerents.[764]

The quest for peace: the path to the "Agreements" between the Church and the State

"A struggle of two immaterial principles could only end when the supporters of one had no more means of resistance," noted T. E. Lawrence, echoing the experience of the total war that broke out in 1914. "An opinion can be argued with: a conviction is best shot. The logical end of war of creeds is the final destruction of one," he concluded.[765] In Mexico, such a war of beliefs not only concerned the government of the Revolution: it also directly involved its army. The main architect of a victorious revolution, since the final days of 1920 the National Army became the guarantor of the new order established by the generals who arrived from Sonora in Mexico City. In fact, for the peoples from the countryside that the new army was now fighting, it did not seem to be very different from the one that had been dissolved in August 1914: it was then known, Meyer notes,

[761] Olivera Sedano, Op. cit., p. 191
[762] Meyer in Silva, Op. cit., p. 180
[763] Piccato, Op. cit., p. 114
[764] Olivera Sedano, Op. cit., p. 197
[765] Lawrence, Op. cit., p. 481

"by the more familiar name of Federation, abbreviation for the formula Armed Forces of the Federation. Rarely has language expressed reality better, unconsciously," the historian concluded five decades ago.[766] More recently, another scholar has pointed out that the intensity of the conflict was fuelled by a decisive factor: the fact that the Cristiada coincided with a founding moment of the Mexican twentieth century in which the process of establishing the new laws of the land gave way to its violent preservation through exceptional measures such as the use of armed force in its counterinsurgency modality.[767]

Be that as it may, the truth is that the Cristeros, like the supporters of the Revolution in Mexico City, considered that their contest was an ideological struggle not always contained by the rational limits that initially governed the exercise of armed violence: therefore, the ideological zeal of the insurgents (which, according to Meyer, appealed to a collective *imitatio Christi*) found a mirror in the «anticlericalism» promoted by the administration of President Calles.[768] As armed instrument of the architects of the new order that emerged after the battle of Ocotlán, the National Army —or rather, the large body of officers that comprised it— considered that the war it was now waging against the enemies of the government concerned it directly, estimating that the Catholic Church was one of the most formidable obstacles to allow the march into the future. "Active agent of anticlericalism and the antireligious struggle, it waged his own war, its religious war," contends Meyer.[769] Like the legionnaires of General Millán Astray, who gave cheers to death before going into combat, in Mexico the army commanders also resorted to their own disquieting war cry by evoking Satan in their encounters with the Cristeros insurgents.[770] This rhetorical device was not accidental: after all, Salvador Elizondo points out, "the name Satan means 'the adversary (of God)'

[766] Meyer, Op. cit., *La Cristiada*, vol.1, p. 146
[767] Gerardo Gómez Michel, "La Cristiada: *Homo Sacer*, nacionalismo y violencia instituciona en torno a la Guerra Santa en México," Iberoamérica, vol. 17, no. 1 (2015), p. 243
[768] Alan Knight, "El utopismo y la Revolución Mexicana" in *La revolución cósmica*, Mexico City, Fondo de Cultura Económica (2015), p. 107-11
[769] Meyer, Op. cit., p. 146
[770] "General Eulogio Ortiz," recalls Meyer, "ordered the shooting of a soldier in whose neck he saw a scapular, some officers led their troops into combat shouting 'Long live Satan!,' and Colonel 'Black Hand,' executioner of Cocula , died exclaiming: 'Long live the Devil!'."Loc. cit. As far as the Spanish legionnaires were concerned, the objective was different: to characterise the dedication of the combatant to their cause as a glorious gesture and, at the same time, to make war an end in itself, presenting it as a redemptive violence that ultimately makes possible "the reconciliation of man with his destiny." Rafael Nuñez Florencio, *¡Viva la muerte! Política y cultura de lo macabro*, Madrid, Marcial Pons (2015), p. 56

and the personification of evil is used to establish a great dialectical antagonism."[771] An antagonism that, for those who took part in the contest, was political, military and ideological at the same time, but which, according to Elsa Cecilia Frost, actually manifested itself as part of a cultural constant to which the enemies of the government were no strangers, for "if the Mexican does not shy away from death for Christ, it is because he never shies away from it, in general." [772] Consequently, the Cristeros War was a «merciless war» that in a certain way anticipated the logic of many of the revolutionary wars that took place in the Third World throughout the last century. [773]

However, by mid-1928 the use of armed force had reached a culmination point for both belligerents.[774] Despite his best efforts, Amaro discovered that the reconcentration policy rehearsed over and over again in western Mexico had precise limits that became counterproductive for the government's cause. Similarly, the appointment of Gorostieta as Chief of the National Guard only partially resolved the strategic dilemmas that the Cristeros rebels faced in those years. On the other hand, the purposes of the people's war led by the Cristeros never found a real correspondence with those who were persecuted by the Catholic Church in Mexico once the conflict broke out. "The powers and the dominions did not stop negotiating for three years, and for three years the war was, in Clausewitz's expression, the continuation of politics by other means."[775] Their game was not that of the Cristeros, whom through their struggle not only sought to defend their old way of life, but also to assert their autonomy against the power of an expanding sovereignty. Rather, for the Church and the State it was a kind of dispute over the paternity of the nation and the way in which its social life would be ordered in the future. By claiming that paternity as their own, each of the contenders postulated the defence of a control mechanism that, according to Gómez Michel, was articulated "from a transcendent institutional dogma —secular or

[771] Salvador Elizondo, "Retórica del diablo" in *Teoría del infierno*, Mexico City, Fondo de Cultura Económica (2000), p. 36

[772] Frost suggests that this conviction finds its source in the religiosity of the pre-Columbian world, which has given the Mexican people "a great sense of mystery and death, which unfortunately leads not to detachment from this world, but to contempt for life." Frost, Op. cit., p. 241

[773] Romo Cedano recovered this approach for the first time, and it appears in the conclusions of the first volume of Meyer's work. In these conclusions the following is read: "A relentless war like all those that oppose a people to a professional army, prefiguration of all the revolutionary wars of the 20th century." Meyer, Op. cit., *La Cristiada*, vol. i, p. 385. Cf. with Romo Cedano, Op. cit., p. 397.

[774] That is to say, "a point reached by attackers or defenders in terms of time and space after which stated objectives can't be accomplished, and continued efforts to reach them would significantly heighten the risk of failure or defeat". Milan N. Vego, "Operational Overreach and the Culmination Point," *Joint Force Quarterly*, no. 24 (2000), p. 100

[775] Meyer, Op. cit., *La Cristiada*, vol. i, p. 7

religious— that served as a containment framework for the institutionalised life of the Mexicans. ".[776] For this reason, for the Mexican ecclesiastical hierarchy the exercise of armed violence became a means at the service of very specific purposes, but when it became clear that such purposes would not be achieved in this way, they became willing to dialogue with the representatives of the State. In fact, the Church's reluctance to endorse the League's politico-military purposes quickly distanced it from those who at that time exercised direct responsibilities on the ground. [777] Accordingly, in the months that preceded the assassination of Obregón, the representatives of the Church sought to negotiate a new accommodation with the leaders of the revolutionary State behind the backs of the insurgents who initially responded to their call.

For his part, Calles was well aware that the political circumstances towards which the country was moving in those years were once again particularly complex and dangerous. As noted previously, by mid-1928 the National Army had demonstrated that the use of force would not yield a lasting political result: unable to force a definitive military solution, the army clashed again and again with the insurgents' determination, who were always able to avoid the blows that Amaro sought to inflict upon them. At the same time, Gorostieta's efforts also had a definite limit: his inability to access a sufficient number of ammunitions to abandon guerrilla warfare and launch a conventional campaign against government troops. As a result, everything seem to lead towards a negotiated solution to the conflict, at least from the point of view of Mexico City, where the administration of President Calles established contact with the members of the Episcopal Committee that the ecclesiastical authorities created in the summer 1926, when the Church raised for the first time the need to articulate a defence of its interests before Mexican society.[778]

The rapprochement between the ecclesiastical authorities and the representatives of the revolutionary State was mediated, in a way that would prove to be decisive, by a figure who from then on exerted an outstanding influence on Mexican affairs: the new United States Ambassador, Dwight W. Morrow.[779] Appointed in October 1927 by the administration of President Calvin

[776] Gómez Michel, Op. cit., pp. 249-50. The author uses the work of thinkers such as Giorgio Agamben and Walter Benjamin to give content to his argument.
[777] Romo Sedano, Op. cit., p. 202
[778] Solis Nicot, Op. cit., pp. 237-38
[779] Stanley R. Ross, "Dwight W. Morrow, Ambassador to Mexico," *The Americas*, vol. 14, no. 3 (Jan., 1958), pp. 273-89

Coolidge, Morrow established a precedent of behaviour that in a certain way defined the scope of the diplomatic dialogue between Mexico and the United States throughout the last century. Unlike his predecessors, who had been in favour of confrontation with the governments of the Revolution, Morrow not only approached Mexico with the desire to understand the nature of the process of political transformation that the country had experienced in those years; he also sought to establish a bridge of understanding between the two countries based on the thesis that their national interest converged. [780] This thesis was well received in Mexico, especially because the administration of President Calles also wanted to constructively resolve the differences with the United States regarding the renegotiation of the Mexican foreign debt, the oil issue, and the claims of those foreign citizens whose interests were affected by the revolutionary experience lived since 1910.[781] "What the president called the normalisation of Mexico's relationship with the world basically meant the normalization of the relationship between the Mexican Revolution and the great powers," pointed out Lorenzo Meyer when pondering the impact of this process of rapprochement between Mexico and the United States.[782] Therefore, the negotiations to put an end to the religious conflict did not come hand in hand with what happened on the ground, but rather within the framework of an exchange that responded to a State logic at the highest strategic level.

In the mirror of Augustus: General Calles and the road to hegemony

In fact, since February 1928 Obregón himself had established a parallel dialogue on the matter, thanks to the good offices of some figures close to the high clergy. However, Morrow's diplomatic dialogue was essential, by virtue of his ties with the representatives of the National Catholic Assistance Conference of the United States and the Holy See, whose representative in Washington also played a prominent role in the negotiation process.[783] However, everything seems to suggest that the Caudillo was not interested in this complex negotiation process, but rather in

[780] María del Carmen Collado Herrera, "La mirada de Morrow sobre México: ¿preludio de la Buena Vecindad?," *Secuencia*, no. 48 (2000), p. 214
[781] Lorenzo Meyer, "Del acuerdo Calles-Morrow a la reactivación del nacionalismo (1928-1936)" in *La marca del nacionalismo*, Mexico City, El Colegio de México (2010), p. 83
[782] Ibid., p. 86
[783] The negotiations were brokered through the work of William F. Montavon, a representative of the National Catholic Conference, and Father John J. Burke, secretary of the Standing Committee of US Bishops in Washington. For its part, the Episcopal Committee appointed Leopoldo Ruiz, Archbishop of Morelia, as one of its main representatives. Solis Nicot, Op. cit., pp. 240-49

the possibility of undermining Calles' authority to present himself to national public opinion as the necessary man: the only one capable of returning to Mexico the peace that the country so longed for. Meanwhile, in the summer of that year the war continued its course while the political-electoral process favoured Obregón, the man whom everyone pointed to as responsible for what happened in Huitzilac. Threatening, Morones spread the rumour that there would soon be a definitive break between the Caudillo and the working class. Once the elections of July 1, 1927 were held, in which Obregón obtained a total of 1,700,000 votes, the newly elected president decided to leave Sonora to go to Mexico City. "Obregón," some students of history point out, "abandons his stronghold and comes to Mexico, for what? To enjoy the victory? To settle the religious conflict? Searching death, like Julius Caesar, who knew he was going to be killed on the Ides of March? Many Obregonists had advised him to wait in Sonora until December to finish off Morones first." [784]

The outcome is well known in Mexico: on July 17, 1928, the President-elect was presented with a lunch by the Guanajuato deputation in a restaurant located south of Mexico City, in San Ángel. There, Toral found the opportunity that finally allowed him to raise his hand to kill Obregón, whom attended that appointment "a few hours before discussing the negotiations with Rome with Morrow."[785] Thus, the death of the Caudillo, immediately attributed to a Catholic militant, put everything achieved by the representatives of the Church and the State in the previous months at risk.

Forced by these circumstances, President Calles made strong statements in which he blamed Catholics for what had happened, although immediately afterwards he qualified his position before the Holy See using Morrow as his conduit. Calles understood that domestic audiences needed to hear a clear position by the President regarding the assassination. As a result, the President was forced to make forceful statements, "but through the United States embassy in Mexico and the State Department, he wanted to send the message to the Holy See that he knew that neither the bishops nor the Vatican had promoted the assassination of Obregón and that the path of negotiation was still open." [786]

[784] Krauze, Meyer and Reyes, Op. cit., p. 145
[785] Loc. cit.
[786] Solis Nicot, Op. cit., p. 250

A grand national party for a great revolution: the call of General Calles

Machiavelli points out that the possibility of recognising the occasion (*ocassione*) is one of the most important virtues of any prince worthy of the name. "Thus, is happy he who accommodates his way of proceeding to the times; on the contrary, is unhappy he whose actions diverge from the time and order of things." [787] For Calles, what happened in the summer of 1928 did not dispel the dangers of the present, but it did make him see that the times could not be more propitious: instead of letting Fortuna do her will, he decided to act energetically to hasten Mexico's march into the future.[788] Thus, when rendering his last State of the Union speech before the Congress on September 1 of that year, Calles announced a position that anticipated the features of what was to come .[789] After pointing out that Obregón's disappearance constituted an irreparable loss, the President highlighted the fact that his absence only added complexity to the set of challenges that Mexico had faced since 1920, when "the properly governmental period of the Mexican Revolution began." Before the whole of the national representation gathered that day at the Legislative Palace of Donceles, the president added:

> All this determines the magnitude of the problem; but the same circumstance that perhaps for the first time in its history Mexico is faced with a situation in which the dominant note is the lack of "caudillos," should allow us, will allow us, to guide the country's politics definitively along the lines of a true institutional life, trying to pass, once and for all, from the historical condition of a country of a man to that of a Nation of institutions and laws. [790]

[787] "Niccolò Machiavelli to Giovanni Battista Soderini," Perugia (13 September 1506) in *Epistolario privado*, Madrid, La Esfera de los Libros (2007), p 109

[788] "It is not possible here to inquire further into the matter," wrote the scholars quoted above. "Would Morones arm Toral's arm? Would Calles have knowledge of what was going to happen? What is of interest here is Calles' reaction and everything he did after the attack on the 17th. In war, fate is sealed, the unpredictable happens suddenly. That is the meaning of the 17th." Krauze, Meyer and Reyes, Op. cit., p. 150

[789] Plutarco Elías Calles, "El general Plutarco Elías Calles, al abrir las sesiones ordinarias del Congreso, el 1º de septiembre de 1928" in *Los presidentes de México ante la Nación, 1821-1984*, vol. iii. Informes y respuestas desde el 1 de abril de 1912 hasta el 1 de septiembre de 1934, México City, Cámara de Diputados (1985), pp. 848-56

[790] "Todo esto determina la magnitud del problema; pero la misma circunstancia de que quizá por primera vez en su historia se enfrenta México con una situación en la que la nota dominante es la falta de "caudillos", debe permitirnos, va a permitirnos, orientar definitivamente la política del país por rumbos de una verdadera vida institucional, procurando pasar, de una vez por todas, de la condición histórica de país de un hombre a la de Nación de instituciones y de leyes." Ibid., pp. 848-49

Like Octavian, General Calles was able to display a disinterested patriotism before the Mexican representatives, pointing out that under no circumstances would he again occupy the presidency of the Republic. However, he also warned that he would never abandon his duties as a citizen, especially since he had assumed them as part of the life of struggles and responsibilities "that correspond to any soldier, to every man born of the Revolution." Immediately afterwards, the president insisted again on the fact that caudillos had exerted a negative influence on the development of Mexico, a country that from then on was called to advance along an institutional path in which men would not be, "as we should not be, but mere accidents without real importance, next to the perpetual and august serenity of the institutions and the laws." [791]

For Calles the challenge of the immediate future was clear: seize the opportunity "to make a determined and firm and definitive attempt to move from the category of people and government of caudillos, to the highest and most respected and most productive and most peaceful and more civilized condition of people of institutions and laws."[792] Such an opportunity, concluded the President, required the support of the entire society, now under the umbrella of what the general defined as the grand «revolutionary family» of Mexico. [793] No less important: to advance in the march towards the future, the participation of the National Army was also necessary, an institution that Calles considered in praising terms, but which also received a particular call for attention when the President pointed out that its members should choose "between the intimate satisfaction of the duty fulfilled and the recognition of the Republic" and a behaviour of treason and disloyalty "that would never find justification before society or before History." [794]

The dice had been thrown. Perhaps then Calles remembered that there was a time when his political career was closely linked to that of Adolfo de la Huerta and Álvaro Obregón, vertices of that *Sonoran triangle* that for a certain time echoed in Mexico the dynamics of the last triumvirate

[791] Ibid., p. 850
[792] Ibid., p. 850
[793] At first, the President referred to the unity of the "Mexican family", in which the president included all the political and social actors of the nation, even considering those who were supporters of conservatism. Later, the president speaks with special emphasis on the «revolutionary family», in which he encompassed all existing currents within the Mexican Revolution. The formula established a discursive precedent that would be used with special insistence throughout the following decades by the members of the Mexican political class. Ibid. Calles, pp. 851-855
[794] Ibid. Calles, p. 855

of Rome.[795] Defeated on the battlefields four years earlier, by 1928 former President Adolfo de la Huerta was no longer a relevant actor in Mexican public life. With the Caudillo dead, the last survivor of that group in a position to exercise effective influence over the future of the country was General Plutarco Elías Calles. "The 'diarchy' that existed between 1924 and 1928 was going to be converted, with the disappearance of one of its members, into a monopoly of power," two noted Mexican scholars would later point out.[796] Thus, when Calles delivered that speech, "Ambassador Morrow, present at the Congress, applauded. The one who was going to be the new master of Mexico, the Jefe Máximo, had been revealed."[797]

Previously, the President had already acted in accordance with such words. On July 21, Luis N. Morones presented his resignation from the Industry and Commerce portfolio, making visible the fracture between the government and the Regional Workers Confederation of Mexico.[798] Four days after rendering his last State of the Union speech, the President met with the Chiefs of Military Operations from all over the country to reiterate the meaning of what was said in that speech: the unity of the army could only be preserved on the condition that the generals give up their most immediate political ambitions.[799]

Similarly, Calles called the governors and other members of the political class to a meeting at Hotel Regis in Mexico City to generate consensus around the need to select a figure capable of assuming the interim presidency from December 1, 1928, the day on which the new period of government was to begin. The names of several generals are mentioned at the meeting, among which Manuel Pérez Treviño, Gonzalo Escobar and Juan Andrew Almazán stood out. However, reference was also made to the names of several figures from the civil sphere: Eduardo Neri, José Manuel Puig Casauranc and Emilio Portes Gil.[800] Ultimately, what was sought was to have a unity candidate to avoid major political upheavals in the immediate future.

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[795] For a critical overview of this issue see Ignacio Almada Bay, "¿Cuál triángulo sonorense?," *Región y sociedad*, vol. xx, no. 41 (2008), pp. 199-205

[796] Rafael Segovia and Alejandra Lajous, "La consolidación del poder" in Lorenzo Meyer (coord.), *Historia de la Revolución Mexicana, período 1928-1934*, Mexico City, El Colegio de México (1978), p. 17

[797] Meyer, Krauze and Reyes, Op. cit., p. 151

[798] Segovia and Lajous, Op. cit., p. 18

[799] Ibid., pp. 25-26

[800] Ibid., p. 26

In mid-September, the conciliation efforts carried out by the President bore concrete results: by then the general consensus among the members of the political class favoured Portes Gil as the candidate to assume the interim presidency. Founder of the Border Socialist Party, in 1925 Portes Gil assumed the governorship of Tamaulipas, consolidating himself as one of the strong men of northern Mexico. Precisely, the end of his administration coincided with the political crisis of the summer of 1928, a moment that Calles took advantage of to invite Portes Gil to join his cabinet as Minister of the Interior. [801] Hence, on September 25 of that year, the Congress decided in favour of Portes Gil, who from that moment on assumed two central commitments for the future of Mexico: calling extraordinary presidential elections in November 1929, and putting an end to the Cristero war. A day later, Congress issued a decree that called for extraordinary elections for Sunday, November 17, 1929, thus re-establishing the process that would allow the renewal of the presidency of the Republic in accordance with the requirements defined by the law. [802]

Protected by these new certainties regarding the political and institutional life of the country, Calles was able to act again with alacrity. On December 1, 1929, Emilio Portes Gil took office as provisional president of the Republic at the National Stadium. That same day, the Organising Committee of the National Revolutionary Party was established as part of a conciliation effort between the different political groups that were part of the revolutionary family that Calles had referred to in his September 1927 report. [803] The initiative, which was the result of the political conciliation work led by Calles in the previous months, made reference to an old aspiration of the leaders of the Revolution: to put an end to personalism and establish a grand national party capable of bringing together all the political forces of "revolutionary" tendency. Few objected then to the fact that the name chosen for the new organization was identical to that of the political institute that in 1927 seconded the candidacy for the presidency of General Francisco R. Serrano; fewer still were those who remembered that the Constitutionalist Liberal Party had been established a decade ago under the same premise. However, it was clear that times had changed: on this occasion the call to establish a new national party had a hegemonic dimension that its predecessor had not.

[801] Ibid., pp. 27-28
[802] Ibid., p. 28
[803] Plutarco Elías Calles et al., "Primer Manifiesto del Comité Organizador del Partido Nacional Revolucionario" (1 december 1928) reproduced in *Historia Documental del Partido de la Revolución*, vol. i. PNR, 1929-1932, Mexico City, Partido Revolucionario Institucional (1986), pp. 37-39.

The Escobarista rebellion, the end of the war of the Cristeros, and the final forking of the road

Under the presidency of Portes Gil, the waters of Mexican politics stirred again, following the pattern of those currents that had previously overflowed its plains. In November 1928, José Vasconcelos, Obregón's former Minister of Public Education, returned to Mexico with the intention of raising the banners of the National Anti-Reelectionist Party, this time to vindicate the other great principle of the Revolution: Effective Suffrage. [804] At the same time, many of the generals who had previously been loyal to the Caudillo were now free of political ties. There was talk of the political ambitions of General José Gonzalo Escobar, a commander that until then had remained loyal to the governments of the Revolution. Like Vasconcelos, General Escobar considered that —contrary to what Calles had promised— the government would not respect the guarantees promised to the opposition in the framework of the political process that would lead to the elections on November 17, 1929. [805]

Rumours that a new uprising would take place soon once again agitated Mexico's public opinion. The Cristeros, who closely follow the development of the events, considered that this situation could be advantageous for the future of their cause. Above all, Gorostieta believed that the possibility of collaborating in military terms with Escobar has a clear advantage: access to the federal arsenals that hypothetically would remain in the hands of the rebels, thus allowing the National Guard to have the necessary war materials to launch a definitive offensive against the government troops. [806] The bet was audacious, although dangerous: time militates against the Cristero insurgents, which by then have remained on a war footing for nearly three years in the face of the permanent siege of the forces led by General Amaro. On the other hand, the Cristeros had no illusions about the moral quality of Escobar and his supporters, whom they considered to be a group of unscrupulous generals, devoid of any political talent or an ounce of honour. [807] At the same time, at the end of 1928 the League sought to establish a rapprochement with Vasconcelos while studying the pertinence of joining an uprising led by General Escobar. The calculation of its leaders was entirely pragmatic: since Vasconcelos did not share the anticlerical zeal of other

[804] Lorenzo Meyer, Rafael Segovia and Alejandra Lajous, "El Maximato" in Op. cit. Meyer, *Historia de la Revolución…*, pp. 93-104
[805] Segovia and Lajous, Op. cit., p. 64
[806] Meyer, Op. cit., *La Cristiada*, vol. i, p. 287
[807] Loc. cit.

revolutionaries, the leaders of the League assumed that if he became president, he would be a very different interlocutor from those who until then had exercised power in Mexico City. [808]

On January 5, 1929, the Organising Committee of the National Revolutionary Party announced that the Convention in which the new party would be established would be held on March 1 in Querétaro. A call was issued inviting all the revolutionary parties and groups in Mexico to participate in the establishment of the new national political party.[809] The document stands out for a way of speaking that anticipates the scope of the political project that Calles had promoted throughout those months. After pointing out that the legal order created by the Revolution was already a reality fully rooted in the public conscience, the document warned that this same legal order needed "an organism of vigilance, expression and support; and this essential function is the one that corresponds to the National Revolutionary Party."[810] In this way, the call anticipated the nature of the new party by pointing out that:

> The Revolution, in short, faithful to the spirit of the people that started it, re-establishes in its purity the democratic procedures of election and selection within itself, constituting itself as a National Party; and to the exterior, continuing its combative mission against antagonistic groups, within peaceful forms of citizenship and for the supreme good of the country. [811]

The hegemonic orientation of the new party was presented in that way, anticipating the intention of erasing the borders that separated the new party from the regime that had made its existence possible. Since Calles was the man behind such an initiative, few then doubted the pretensions of that Sonoran general who in December 1928 had announced his definitive retirement from Mexican public life.

A couple of weeks later Gilberto Valenzuela announced his intention to compete for the presidency of the Republic. An outstanding figure within the group that arrived from Sonora, Valenzuela had

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[808] Ibid., p. 315
[809] "Convocatoria de la Convención Constitutiva del Partido Nacional Revolucionario a las agrupaciones Revolucionarias de la República," Mexico City (5 de enero de 1929) reproduced in *Historia documetal del Partido de la Revolución*, vol. i. PNR 1929-1932, Mexico City, Partido Revolucionario Institucional (1981), pp. 49-56
[810] Ibid., p. 49
[811] Ibid., p. 50

been Secretary of the Interior of Calles and a man close to Obregón. His aspirations were also joined by those of Antonio I. Villarreal, a figure closer to agrarianism and anti-reelectionism. [812] Shortly after, General Pedro Rodríguez Triana announced that he would run for the presidency under the protection of the Mexican Communist Party, a formation that nominated its candidate through its own bloc.[813] However, the attention of public opinion in those days focused on the campaign of José Vasconcelos, who not only had the sympathy of the urban middle classes of the country, but also aroused the enthusiasm of the young university students of the capital. [814] Fuelled by an incendiary oratory, Vasconcelos supporters organise public demonstrations that are soon repressed by the police and by groups of gunmen affiliated with the government. Finally, on March 1 of that year, the Convention of the National Revolutionary Party was inaugurated in Querétaro, where the work of the delegates also allowed establishing the mechanisms through which their candidate for the presidency of the Republic would be elected. Two days later, General Gonzalo Escobar took up arms against the government, releasing a brief proclamation in which he believed he explained the scope of his movement.[815]

In the Hermosillo Plan, the supporters of the Renovation Movement headed by Escobar expanded the reasons for their actions, displaying an exercise in rhetorical invention that contrasted with the bureaucratic modernity of the language used to publicize the creation of the new National Revolutionary Party. [816] After announcing that the uprising only sought to enforce the provisions of the Querétaro Constitution, the document pointed out that Calles was the source of the corruption that afflicted the country, especially since he intended to "remain at all costs in the seat of the Caesars." For this reason, they warned that Calles wanted to resort to a new imposition, "inventing new masks, new comedies and new mystifications every day." In short, that he was guilty of having dreamed "with the possibility of circumventing the inclinations and wishes of the people, imposing

[812] Meyer, Segovia and Lajous, Op. cit., p. 93-95
[813] This was the Bloc of Workers and Peasants, which functioned as the party's electoral arm in the run-up to the 1929 elections. Elisa Servín, "Los opositores de la posrevolución" in *La oposición política*, Mexico City, Fondo de Cultura Económica (2006), p. 45
[814] Meyer, Segovia and Lajous, Op. cit., pp. 95-99
[815] The document merely stated that the new movement would fight Callista tyranny and that it would demand respect for the gains previously achieved by Mexican peasants and workers.. Gonzalo Escobar, "Proclama a todos los campesinos del País", Torreón, Coahuila (3 March 1929) reproduced in Op. cit. *Planes…*, p. 255
[816] "Plan de Hermosillo", Hermosillo, Sonora (3 March 1929), reproduced in Ibid., pp. 256-58

on the Presidency of the Republic, by force of bayonets and crime, one of his puppets." [817] According to the new rebels, that puppet was none other than Emilio Portes Gil, the provisional president who would be responsible for ensuring the success of the November 1929 elections. At any rate, Calles revealed himself as what he was, according to the followers of Escobar: the great impostor; a great gesticulator willing to set himself up as the final arbiter of the destiny of the fatherland. [818]

The document concluded with a series of articles that contemplated the establishment of a "Renovating Army of the Revolution" and the designation of General Gonzalo Escobar as Supreme Chief of the new movement.[819] Drafted by Gilberto Valenzuela, the plan was signed by a group of generals who had previously remained loyal to the government's cause, including Jesús M. Aguirre, Marcelo Caraveo, Roberto Cruz, Francisco R. Manzo, Fausto Topete, and Francisco Urbalejo, among others.[820] However, and despite its studied theatricality, the Hermosillo Plan was unable to arouse the enthusiasm that at other times had favoured this kind of uprising. Former supporters of Obregón, the generals now launching into rebellion were viewed as a group of opportunists, devoid of any sense of political responsibility. Thus, on March 7, 1929, the candidate of the National Anti-Reelectionist Party, José Vasconcelos, energetically condemned the new uprising by declaring that "a merely military movement whose aim is to destroy a power created by those who are fighting today does not deserve any sympathy, nor does it offer any hope." [821] Immediately afterwards, Vasconcelos declared his confidence in the civilist character of the Portes Gil administration.

Yet, the uprising compromised military units in no less than six states in northern Mexico, among which Sonora once again figured. Taking as a reference the behaviour that had always characterized Obregón, Calles then asked President Portes Gil to appoint him as War Minister to lead the campaign against the rebel generals. [822] Once again, this pragmatic division of functions bore immediate fruit: with the authority granted him by the President of the Republic, Calles concentrated a total of 35 thousand federal troops to force an outcome in north-western Mexico,

[817] Ibid., p. 256
[818] Ibid., p. 257
[819] Ibid., p. 257
[820] Segovia and Lajous, Op. cit., p. 69
[821] "Declaraciones del Lic. José Vasconcelos en las que condena la rebelión militar de Sonora y Veracruz," Acámbaro, Guanajuato (7 March 1929) reproduced in Op. cit. *Planes…*, p. 258258
[822] Meyer, Op. cit., *La Cristiada*, vol. i, p. 288

area in which the units of the Escobarista rebels were concentrated. [823] A new decisive battle, fought in Jiménez, Chihuahua at the end of April, allowed the government troops to annihilate the rebels. The action coincided with one of the last strategic determinations of Gorostieta, who estimated that the Escobarista rebellion should be used by the Cristeros to launch a general offensive against the government troops, which would begin with a major assault on the city of Guadalajara.[824] However, what happened on the ground did not favour this determination: after defeating the Escobarista contingents, it was Calles who found himself in a position to invade the territory that the Cristeros controlled in Los Altos de Jalisco and other portions of western Mexico. [825] Thus, harassed by a new federal offensive, Gorostieta announced a general withdrawal of the Cristero forces and left for Michoacán in order to reorganise the loyal contingents operating in that state[826]

Enrique Gorostieta Velarde did not suffer a fate similar to that of General Stonewall Jackson, the brilliant Confederate commander who was killed by a contingent of his own army who mistook him for the enemy on the night that decided the outcome of the Battle of Chancellorsville.[827] In reality, Gorostieta was surprised by the troops of General Saturnino Cedillo on June 2, 1929 when he was preparing to study the enemy's positions in the vicinity of Atotonilco, in the state of Michoacán. In the immediate term, Meyer points out, his death did not change much the situation of the belligerents, who continued with the war efforts already carried out. [828] However, by then the course of the negotiations between the Church and the State was beginning to bear concrete fruit: at the end of June, the consensus reached between the negotiators made it possible to establish the bases for an arrangement that would allow a definitive understanding between both powers.

In an interview granted in those days, President Portes Gil summarized the meaning of the proposal, pointing out that the government saw no problem with the possibility of the Church resuming public worship, as long as its representatives were willing to abide by the laws in force in

[823] Ibid., pp. 288-89
[824] Ibid., p. 290
[825] Ibid., p. 304
[826] Ibid., p. 305-306
[827] Bevin Alexander, "The Fatal Blow" in *Such Troops as These*, New York, Berkley Caliber (2014), 218-219.
[828] Meyer, Op. cit., *La Cristiada*, vol. i, pp. 306-307

the matter, respecting the legally constituted authorities.[829] The ecclesiastical authorities promised to follow such guidelines, but at the same time they established three conditions to reach a definitive settlement: *(1)* general amnesty for all those who took up arms, *(2)* the return of the churches and other properties to the representatives of the Church and *(3)* a guarantee regarding the fact that the return of such properties would be subsequently respected by the government. [830] Finally, on June 21, 1929, the representatives of both powers signed the Agreements that established a new *modus vivendi* between the Church and the Mexican State that allowed the ecclesiastical hierarchy to recover the spaces of power that it had previously ceded to the Catholic lay associations such as the National League for the Defence of Religious Freedom or the Cristeros insurgents themselves. [831] Once the Arrangements were signed, public worship was restored, allowing the faithful to return to the temples from which they had been expelled at the end of 1926. Pressured by the determinations reached within the Episcopal Committee, the National League for the Defence of Religious Liberty was forced to accept this outcome, collaborating in the disarmament of the National Guard. The members of this last corporation were offered guarantees that were not always respected: the testimonies indicate that many of the combatants who accepted disarmament were subsequently killed or persecuted by government forces. [832] The Cristeros war ended in this way as it had begun: under cover of an outcome that few would have believed possible, apparently alien to the polarity that had governed the evolution of the conflict until then. [833]

Conclusion

Almost six decades after that outcome, Octavio Paz sought to offer an interpretation of what happened in 1929, when General Plutarco Elías Calles showed that he was a prince capable of correcting the course of the tributaries to channel the waters of the Mexican historical process in a discernible way. Like many before him, Paz did not resist the temptation to resort to a powerful historical analogy, pointing out that the circumstances of Mexico at the end of the third decade of

[829] Emilio Portes Gil, *Quince años de política mexicana*, Mexico City, Editorial Botas (1941) quoted in Olivera Sedano, Op. cit., p. 207
[830] Ibid., p. 207-208
[831] Gómez Michel, Op. cit., p. 249
[832] Olivera Sedano, Op. cit., pp. 209-10
[833] Meyer, Op. cit., "The Conflict Between State and Church…", p. 186

the last century bore a certain resemblance to those that existed in ancient Rome during the phase that allowed the transition from the Republic to the Empire. [834] Certainly the poet was not the first to resort to this criterion: in 1930, when the stability of the new order seemed to be a more certain thing, Alfonso Reyes sought to compare the policy of national reconstruction that had begun under the Calles administration with the deeds of Virgil. "Even among us, after internal struggles, the need for agrarian policy is imposed to create new national wealth and return to the people a contentment with the land," said the son of General Bernardo Reyes. [835] Nobody in Mexico then seemed to object to the fact that it is not possible to refer to the *Georgics* without invoking the name of Augustus. In fact, Paz was the first to notice that echo in Reyes' words, noting that they could only be read with discomfiture.[836] In Italy, by contrast, the link with the present was apparent to all from the start: "Love for his country and love for his countrymen: the two great loves of Virgil are the bases of that spiritual movement that we have called *Fascismo*," wrote Mussolini the very same year in which Reyes presented his own eulogy of the Latin poet.[837]

In any case, the early formation of the Sonoran triangle made up of Plutarco Elías Calles, Adolfo de la Huerta, and Álvaro Obregón suggested from the beginning this kind of equivalence with the Roman world, especially since at the beginning of the 1920s Mexico had already lived all the shocks typical of a real civil war. On the other hand, as of 1924 it became evident that a kind of diarchy had been established in Mexico, sustained thanks to the precarious balance established between the presidential investiture and the figure of the «caudillo», who could appeal to a source of legitimacy foreign to the constitutional order established in Querétaro. Thus, for the historian Álvaro Matute, the strengthening of the diarchy would have resulted in "an alternation of presidents ad infinitum, or until one decided to eliminate the other from the game, or else a third party emerged who had enough strength to dispute the site to the former." [838] Although unlikely, this dynamic had been formally made possible because the constitutional reform that allowed Obregón's re-election excluded the possibility that a president could be re-elected immediately after the end of his term.

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[834] Octavio Paz, "Hora Cumplida (1929-1985)," *Vuelta*, no. 103 (1985), pp. 7-12

[835] Alfonso Reyes, "Discurso por Virgilio" in Op. cit., *La X en la frente*, p. 125. El discurso fue leído por Reyes en Río de Janeiro en agosto de 1930. Una primera versión del texto fue dada a conocer en *Homenaje al poeta Virgilio en el segundo milenio de su nacimiento*, Mexico City, Secretaría de Educación Pública (1931), pp. 385-410

[836] Paz, Op. cit., p. 7

[837] Richard F. Thomas, "Virgil in a cold climate: Fascist reception" in *Virgil and the Augustan Reception*, Cambridge, Cambridge University Press (2001), p. 236

[838] Matute in Mirón Lince, Op. cit., p. 133

Thus, it was a formula that was useful for the political pretensions of a single man but that actually introduced a destabilising element in the institutional architecture of the nascent Mexican political system. [839] That is why the return to the principle of non-re-election established an immediate corrective to this dynamic.

Matute's reflections on this subject were published for the first time in 1986, as part of a volume that summarised the evolution of the Mexican State throughout the last century. A year earlier, the brief essay in which Paz compared what happened in 1929 with the founding of the Roman principate ventured an additional thesis: the lasting political stability that the country achieved from that moment on could only be achieved by postponing the exercise of democratic freedoms that the Mexican Revolution had raised since 1910. For this reason, although Calles' call to establish a country of laws and institutions was dictated by the needs of the moment, in reality it was also the expression of a solution that sought to put an end to the contradictions that had fuelled the cycles of political violence that Mexico experienced in the first decades of the last century:

> Like Augustus after so many years of civil wars and the assassination of Julius Caesar, General Calles, after the violent death of caudillo Obregón, sought a solution that was both political and institutional. By the first reason, the solution had to be a compromise, in Rome between the Monarchy and the Republic, in Mexico between Dictatorship and Democracy; by the second one, the new regime had to be based not on caudillos but on institutions, on an impersonal bureaucracy and not on an unpredictable monarch.[840]

This approach coincides with the way in which historians such as Castro or Meyer would later characterise Calles, pointing out that he was closer to a bureaucratic dictator, capable of behaving in a rational way that was more prudent than that of the vast majority of his predecessors. At the same time, it also allows us to understand the harshness with which he sought to confront the Cristeros insurgency: for Calles, this unexpected armed emergency called into question the possibility of achieving a lasting peace in Mexico, a country that at that time was barely giving the first steps to leave behind the destruction caused by the great civil war that had begun in 1910;

[839] Ibid., p. 150
[840] Paz, Op. cit., p. 7

pragmatic, he understood that the possibility of reaching an understanding between the Church and the State was preferable to a permanent confrontation.

On the other hand, the decision to establish a national political party capable of bringing together all those revolutionary political organisations already existing was mirrored was happening at that time in a world agitated by new political passions. The establishment of the National Revolutionary Party, which initially functioned as a confederation of local parties, gradually displaced these formations until they became irrelevant. Similarly, the set of corporate structures that had previously been under the umbrella of entities such as the National Agrarian Party or the Mexican Labour Party were integrated into the new party under a scheme that favoured political centralization and control. "It is also revealing that the first name of the group was the National Revolutionary Party," Paz pointed out in his essay. "It is a name with the flavour of the times that evokes both the socialist nationalism of Mussolini and the 'socialism in one country' of the nationalist Stalin. But the Russian and Italian parties had conquered power while the Mexican party was created from power." [841] Paz thus highlighted a fact that is decisive for understanding the logic on which the operation of the Mexican political system rested throughout the last century: the party of the Mexican Revolution, which over time adopted different names, was not established by a passionate group of militants committed to the achievement of a defined ideological program within the framework of clandestine action; rather, it was a bureaucratic structure that was conceived from power to face the challenges generated by a process of political change that until then had only been mediated by the exercise of violence. [842] Although the varnish of the corporate rhetoric of the time would suggest the establishment of a total structure, the truth is that at first the new party was a tool that had to welcome the local powers on which the stability of the country depended at that time.

It is famously known that the Senate granted Augustus the dignity of being recognized as «first citizen» of the Republic, that is, *Princeps Civitatis*.[843] Calles did not receive such dignity from the Mexican Congress, but in exchange he was recognised as the Maximum Chief of the Mexican

[841] Ibid., pp. 7-8
[842] Segovia and Lajous, Op. cit., p. 36
[843] On this issue and its significance consult Walter Eder, "Augustus and the Power of Tradition: The Augustan Principate as Binding Link between Republic and Empire" in Kurt A. Raaflaub and Mark Toher (eds.), *Between Republic and Empire*, Berkeley, University of California Press (1993), pp. 71-12

Revolution. This title, which would suggest an absolute pre-eminence over the affairs of Mexican public life, must be qualified: as Buchenau has suggested, the ability to exercise this general tutelage over the political process was limited by structural factors that established very precise limits to what that the revolutionary rulers of Mexico could achieve at that time. [844] However, what stands out in Calles is the determination to guide the public life of the country under the protection of a vertical logic that found the sources of its legitimacy in the program of the Mexican Revolution. Like the Centaur Chiron —that preceptor who taught the rulers of the ancient world the relevance of knowing how to behave like beasts (by resorting to force) or like men (by resorting to the law) depending on the circumstances— Calles established a precedent that gave content to the strategic culture of a country in which the presidential investiture would exert a decisive influence. [845] As a result, the call to constitute a country of laws and institutions found a correlate in the creation of corporate structures capable of exercising effective tutelage over the masses of peasants and workers to whom the Revolution claimed to owe its power. Hence, scholars such as Pansters have subsequently pointed out that the Mexican State was capable of articulating a set of zones of coercion and hegemony that for a long time made it possible to preserve this singular structure of political domination.[846]

When launching the call that made possible the establishment of the Party of the Revolution, Calles did not make direct reference to the National Army, on the understanding that this powerful instrument would remain loyal to the Maximum Chief of the Revolution. Five years later his successor in the Presidency of the Republic would address the military question from a different vantage point by claiming that the Party needed a Military Sector, equivalent in prerogatives to the already existing worker, popular and peasant sectors. His name was Lázaro Cárdenas: the general whose life Estrada spared shortly before the battle of Ocotlán. With him, the ideological force of «revolutionary nationalism» would once again break into the political life of Mexico, defining to a great extent the behaviour of its political class in the central years of the twentieth century.

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[844] Jürgen Buchenau, "Jefe Máximo of the Revolution" in *Plutarco Elías Calles and the Mexican Revolution*, Lanham, Rowman & Littlefield (2007), p. 144

[845] Niccolò Machiavelli, "De qué modo deben los príncipes observar su palabra" in *El Príncipe*, trad. Stella Mastrángelo, Montevideo, Nordan-Comunidad (1993), pp. 155-157

[846] Wil G. Pansters, "Zones of State-Making: Violence, Coercion, and Hegemony in Twentieth-Century Mexico" in Wil G. Pansters (ed.), *The Other Half of the Centaur*, Stanford, Stanford University Press (2012), pp. 19-58

Epilogue. Past as prologue: the limits of Mexico's strategic narrative

But whatever may be the reserve of the times to come, I end these meditations by exhorting my countrymen to return to the reality they have so long shunned, and to risk with honour and courage whatever happens.[847]

Edmundo O'Gorman

In the summer of 1945, the Mexican poet Octavio Paz was invited to teach a course at Middlebury College.[848] Previously, Paz served as a correspondent at the Conference of San Francisco, where he witnessed the "roar of peace" that was born out of the end of the last world war.[849] By then, the needs of the war prompted the Spanish School of that college —headed by a remarkable group of Spanish exiles— to move away from the main Middlebury campus to nearby Bread Loaf, Vermont.[850] Paz was not the first Mexican to take part in this initiative, as his stay at Middlebury was preceded by that of the renowned philosopher Samuel Ramos, who came to Vermont at the invitation of the State Department.[851] Nonetheless, Paz's stay at Middlebury made possible a memorable encounter with Robert Frost, the great American poet who in the first half of the last century exerted an influence in his country similar to that which Paz himself would exert a couple of decades later in Mexico.[852]

The encounter took place thanks to the intervention of José Bianco, who commissioned Paz to conduct an interview with Frost, subsequently published in the Buenos Aires magazine *Sur*.[853] Given the fascination that the Vermont landscape held for both poets, the interview initially focused on

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[847] "Pero sea la que fuere la reserva de los tiempos por venir, doy fin a estas meditaciones exhortando a mis compatriotas a que vuelvan a la realidad que tanto han rehuido y que arriesguen con honor y denuedo lo que acontezca." Edmundo O'Gorman, *México: El trauma de su historia*, Mexico City, Consejo Nacional para la Cultura y las Ares (1999), p. 111

[848] Paz had previously lived in New York, where he established an enduring dialogue with Jorge Guillén and other poets of his circle. Jacques Lafaye, *Octavio Paz en la deriva de la modernidad*, Mexico City, Fondo de Cultura Económica (2013), pp. 85-105

[849] Antonio Saborit, "El estruendo de la paz: Octavio Paz en San Francisco" in Octavio Paz, *Crónica trunca de días excepcionales*, Mexico City, Universidad Nacional Autónoma de México (2008), pp. 7-29

[850] Roberto Véguez, "Juan Centeno —Tercera Parte: 1943-1949" in *En las Montañas de Vermont: Los Exiliados en la Escuela Española de Middlebury College (1937-1963)*, Middlebury, Middlebury College (2019) [on line].

[851] Ibid.

[852] For the significance of this meeting see John Zubizarreta, "Octavio Paz and Robert Frost: *El Polvo y la Nieva Que se Deshacen Entre las Manos*," *Comparative Literature*, vol. 47, no. 3 (1995), pp. 235-50

[853] At the time, Bianco was the editorial secretary of that magazine. Guillermo Sheridan, *Poeta con paisaje: Ensayos sobre la vida de Octavio Paz*, Mexico City, Ediciones Era (2004), p. 436

the contrast between the forests of New England and that arid portion of the Mexican countryside which had been historically hostile to human endeavour in Paz's homeland.[854] Yet the conversation about the natural landscape soon turned into a conversation about the character of the present: according to both poets, once the war was over, what remained was a sense of unease at the contradictions of industrial modernity and a fear of loneliness born of the conformity that by then seemed to prevail in the heart of the great cities of the West. Thus, according to Frost, the work of the poet is revealed as an exercise in freedom that can lead to unexpected outcomes:

> Life is like poetry, when a poet writes a poem. It starts out by being an invitation to the unknown: he writes the first line and doesn't know what comes next. We don't know what's waiting for us in the next line, whether it's poetry or failure. And the poet has that sense of moral danger in all his adventures.[855]

But this exercise of creation that makes possible the encounter with the poetic can also be considered as a space of decision that lies in a certain notion of responsibility on the part of the poet. "The chance of failure is hiding in every line, every phrase. So is the danger that the whole poem will fail, not just a single line," added Frost. "And that's how life is: we can lose it at any moment. Each moment is a mortal risk. And each instant is a choice."[856] A choice that evokes the dilemma Frost himself expressed in "The Road Not Taken," perhaps the most famous and most misunderstood of his poems.[857]

In this way, Paz's interview with Frost in the summer of 1945 recreated some of the concerns that the American poet had considered thirty years earlier, when his friend Edward Thomas accompanied him on the trails of rural England to begin a poetic dialogue that was only interrupted by the latter's death at the Battle of Arras on 9 April 1917.[858] In fact, as David Orr has noted, "The Road Not Taken" was inspired "by Thomas's habit of regretting whatever path the pair took during their long walks in the countryside."[859] However, from the very beginning Frost's intention in

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[854] Octavio Paz, "Visit To A Poet (Vermont, 1945)," *The American Poetry Review*, vol. 5, no. 1 (1976), pp. 8-9
[855] Ibid., p. 8
[856] Loc. cit.
[857] David Orr, *The Road Not Taken: Finding America in the Poem Everyone Loves and Almost Everyone Gets Wrong*, New York, Penguin Books (2015), p. 11
[858] Ibid., p. 29. Cf. with Matthew Hollis, "Arras, 1917" in *Now All Roads Lead to France: A Life of Edward Thomas*, New York, W. W. Norton & Company (2011), pp. 315-33
[859] Ibid., p. 65

writing such a poem was misunderstood: for the vast majority of readers the central image of the poem is that of a lonely road "that we take at great risk, possibly for great reward."[860] And yet, such an interpretation is at odds with a more complex approach in which the poem revolves not around the decision to take the less travelled road but around the need to consider the dilemmas and the limitations of choice, as well as the impossibility of taking both roads simultaneously. As a result, the title of the poem —as the poem itself— can be considered as "a small but potent engine that drives us first toward one untaken road and then immediately back to the other, producing a vision in which we appear somehow on both roads, or neither."[861] Therefore, Frost drew on a strategic virtue which was to be noticed by John Lewis Gaddis much later: the ability to simultaneously hold two apparently contradictory ideas so as to play with them effectively and act accordingly.[862] "The Road Not Taken" then becomes a poem about the decisions taken at each step by human beings when they are confronted with the challenges of the moment. A poem, in short, about the march of history that can well be read in a strategic manner.

Mexico's strategic path in retrospect: the legacy of a particular historical narrative

"Poetry is frequently (endlessly, tediously) compared to music", points out Orr. Not so much with competitive sports, and even less, we might add, with strategy.[863] There is no doubt, however, that the dilemmas faced by the poet are related to those faced by any group or individual interested in understanding the outcome of a specific decision. This outcome, moreover, is the result of a negotiation with reality: when confronted with the structural forces that condition human events, no less than with the irruption of the unexpected, there is always the illusion that the decision reached rests entirely in our own hands.[864] "I suppose I live chiefly in the past, realizing what happened and takin credit for it just as if I had predetermined it and consciously carried out", noted Frost at some point of his life only to add that this had never really been the case.[865] In a way, the poet echoed the words of Lincoln when the President confessed that it was not he who

[860] Ibid., p. 69
[861] Ibid., p. 72
[862] John Lewis Gaddis, *On Grand Strategy*, London, Penguin (2018), p. 14
[863] "Yet here is Frost —'You've got to *score*'— doing exactly that," Orr adds, referring to ice hockey. Op. cit. Orr, p. 89
[864] Ibid., p. 114-16
[865] Ibid., p. 116.

controlled events, but that events had always controlled him.[866] Poetry and rhetoric thus serve as resources for dealing with the chaos of the real.[867]

As far as Mexico is concerned, this way of approaching the encounter between poetic experience and historical reality is particularly relevant. Throughout the last century, Mexicans (especially those close to political power) could congratulate themselves on having chosen a path seldom trodden by other Latin American societies, thus giving a foundation to the claim of their own political exceptionality. In 1960, as the Mexican Revolution reached its fiftieth anniversary, the authorities resorted to an extensive programme of commemorations that sought to highlight the historical necessity of the outcome of the great civil war that began in 1910.[868] Its outcome was the ceremony led by President Adolfo López Mateos on 20 November of that year under the shade of the Monument to the Mexican Revolution.[869] Three years later, a former member of the Constituent Congress of 1917 declared that Mexico had gone through three great historical phases that had as their natural outcome the establishment of the revolutionary order that finally gave meaning to the national process in the first decades of the last century.[870] In this way, the contingency of the historical process was gradually replaced by a «confabulation» which by the 1960s already held a hegemonic place in the narrative of the regime established in Mexico at the end of the great civil war of 1910.[871] By then, the complex historical experience that Mexican society had undergone in the first half of the last century was replaced by the revolutionary orthodoxy that emerged from 1929 onwards. An orthodoxy which, according to Alan Knight, saw the revolution "as a unique national experience: *Gesta Dei per Mexicanos*."[872] Confabulation, especially because the range of decisions that Mexican leaders previously adopted to address the needs of each historical instant was now presented as the expression of a historical narrative governed by a

[866] "Abraham Lincoln to Albert G. Hodges (April 4, 1864)" in Steven B. Smith (ed.), *The Writings of Abraham Lincoln*, New Haven, Yale University Press (2012), p. 419
[867] Op. cit. Zubizarreta, pp. 242-43
[868] Virginia Guedea, *La historia en el Sesquicentenario de la Independencia de México y en el Cincuentenario de la Revolución Mexicana*, Mexico City, Universidad Nacional Autónoma de México (2014), pp. 1-33
[869] Ibid., pp. 170-76
[870] Juan de Dios Bojórquez, *Hombres y aspectos de México en la tercera etapa de la Revolución*, Mexico City, Instituto Nacional de Estudios Históricos de la Revolución Mexicana (1963), p. 7
[871] In other words, a narrative invention which is useful for explaining our circumstances, even if it is not faithful to what really happened. Orr, Op. cit., p. 119
[872] Alan Knight, "The Mexican Revolution: Bourgeois? Nationalist? Or Just a 'Great Rebellion'?," *Bulletin of Latin American Research*, vol. 4, no. 2 (1985), p. 11

teleology that bestowed on the Mexican Revolution the status of a demiurge or meta-historical subject.[873]

However, the process of transformation that the country underwent before reaching the middle of the last century was not exempt from the contradictions of any collective work. By the end of the 1940s, many of these contradictions had turned into real grievances. From 1934 onwards, the man who had saved his life in December 1923 thanks to the goodwill of General Enrique Estrada took over the reins of the Mexican State to radically turn around the national reconstruction work undertaken by the Supreme Chief of the Revolution. The latter was expelled from the country two years later, thus ending the period in which *Sonorismo* defined the course of national political life.[874] Under the government of General Lázaro Cárdenas (1934-1940), the regime renewed the rhetoric of «revolutionary nationalism» with the intention of mobilising the actors who were formally considered as protagonists of the Mexican revolutionary movement: the workers and the peasants. As a result, Cárdenas resorted to the mass politics of a corporative State with the intention of consolidating the political scaffolding previously sketched out by the National Revolutionary Party.[875] In this context, the dispute over the content of the programme of the Mexican Revolution fractured the consensus that prevailed in the country in previous years: for many of its detractors, the socialist rhetoric of Cardenismo was the expression of a process of political polarisation that moved away from the original postulates of the revolutionary movement.[876] For others, however, it was a return to the origin: a renewal of the political commitment of the Mexican Revolution to the great social causes for which thousands of men had died on the battlefields of the civil war that began in 1910.

Military policy did not escape this process of ideological polarisation. Unlike his predecessors, who until then shared General Amaro's view on the need to consolidate a professional army in Mexico, Cárdenas placed the military question under the umbrella of the corporate logic on which his

[873] Rafael Rojas, *La epopeya del sentido: ensayos sobre el concepto de Revolución en México (1910-1940)*, Mexico City, El Colegio de México (2022), pp. 9-23
[874] Jürgen Buchenau, *Plutarco Elías Calles and the Mexican Revolution*, Lanham, Rowman & Littlefield (2007), pp. 173-200
[875] Alicia Hernández Chávez, "Piezas de una maquinaria" in *Historia de la Revolución Mexicana: Periodo 1934-1940*, vol. 16, La mecánica cardenista, Mexico City, El Colegio de México (1979), pp. 9-32
[876] Luis Medina, "Origen y circunstancia de la idea de unidad nacional," *Foro Internacional*, vol. 14, no. 3 (1974), pp. 265-90

programme of political change rested.[877] In 1938 the National Revolutionary Party changed its name to the Party of the Mexican Revolution. In the call announcing this decision, it was stated that the new party would be integrated by four major sectors, among which a military sector figured prominently.[878] In this way, Cárdenas' solution to the Mexican military question rested on the pretence of creating a party made up of peasants, workers and soldiers, like those that headed the vanguard of the revolutionary movement in other societies.[879]

Such a decision soon created significant tensions. Under the umbrella of the political modernisation process that began in the 1920s, the new Mexican revolutionary State was able to mass many of the powers that in other historical moments accompanied that process, allowing its authority to extend into domains that previously escaped to it. Contrary to what might be thought, this process did not lead to the socialist society predicated by the rhetoric of Cárdenas, but to a development project governed by the aspiration to consolidate a capitalist industrial society in Mexico. [880] Against this background, the attempt to bring the military into the political movement led by «Cardenismo» fractured the unity of the grand revolutionary family that Calles had envisioned in the previous decade. It was Cárdenas himself who imagined a solution to this looming crisis: to impose a moderate successor on the presidency of the Republic, alien to the desire for radical change preached by Cardenista rhetoric.[881] Thus, when the Party announced that General Manuel Ávila Camacho would be its candidate to run in the 1940 presidential elections, the officer corps of the Mexican Army again fractured into apparently irreconcilable factions; not a few generals came out in favour of General Juan Andrew Almazán, a pragmatic figure close to the most conservative circles in the army.[882] The outcome was an election day marred by violence in which *pistoleros* sympathetic to the different warring factions terrorised voters.

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[877] "El ejército y el régimen cardenista" in Hernández Chávez, Op. cit., pp. 77-120. Cf. with Thomas Rath, *Myths of Demilitarization in Postrevolutionary Mexico, 1920-1960*, Chapel Hill, The University of North Carolina Press (2013), pp. 38

[878] "La reorganización sectorial" in Ibid., pp. 181-86

[879] "Memorándum sobre el nuevo Partido de la Revolución", Archivo General de la Nación, Ramo Presidentes, Fondo Lázaro Cárdenas, Expediente 544.61/103, pp. 1437-41, reproduced in Dulce Liliana Cruz Rivera, "Del partido de grupo al partido de masas," Instituto Nacional de Estudios Históricos de la Revolución Mexicana (2014) [online]

[880] Arnaldo Córdova, *La formación del poder político en México*, Mexico City, Era (1972), pp. 13-34, and 45-61

[881] Medina Peña Op. cit., p. 284

[882] Ricardo Pérez Montfort, *Lázaro Cárdenas: Un mexicano del siglo XX*, vol. ii, Mexico City, Debate (2019), p. 192

Once in power, General Manuel Ávila Camacho abandoned the radical rhetoric of his predecessor to propose the creation of a government of «national unity». The new formula proved useful in reconciling a society which in the previous years lived in the shadow of an intense process of political polarisation.[883] In December 1940, the National Council of the Party of the Mexican Revolution sanctioned the disappearance of its Military Sector, stating that Mexican soldiers could take part in the country's public life on condition that they always did so in their capacity as citizens.[884] Moreover, under the presidency of Manuel Ávila Camacho (1940-45), the government of the Revolution opened its doors to a new generation of leaders, many of whom had been educated at the National University's schools of higher learning.[885] This fact is especially important because the dominant historical narrative rests on the proposition that it was in those years that Mexico made the definitive transition from a regime dominated by the military to one, of a new type, definitively dominated by civilians. Accordingly, the arrival of Miguel Alemán Valdez as President of the Republic in December 1946 is seen as the end point of a process that culminated in the establishment of a civilianist regime committed to the programme of the Mexican Revolution.[886] This confabulation, however, does not survive a more rigorous examination of Mexico's historical experience.

Authoritarian civilianism as a result of the Mexican historical experience

At the time, the administration of President Miguel Alemán Valdés (1946-1952) was celebrated as the most tangible expression of Mexico's transition to a new period of political modernity. As a lawyer trained at the National Autonomous University of Mexico, the new president emphasised his civilist vocation, now inscribed within the framework of a programme aimed at reconciling the search for social justice with the country's economic modernisation.[887] From the outset, dissenting voices warned that Alemán's arrival to the presidency was not free of the contradictions that the regime had created in the previous decades. To understand why this was so, it is necessary to go back to what happened in those years. Paul Gillingham recalls that the

[883] Medina Peña, Op. cit., pp. 282-86
[884] Rath, Op. cit., p. 50. Cf. with Enrique Plasencia de la Parra, *El Ejército Mexicano durante la Segunda Guerra Mundial*, Mexico City, Siglo Veintiuno Editores (2017), pp. 25-26
[885] Ryan M. Alexander, *Sons of the Mexican Revolution: Miguel Alemán and His Generation*, Albuquerque, University of New Mexico Press (2016), pp. 1-18
[886] Rath, Op. cit., p. 81
[887] Alexander, Op. cit., pp. 79-122

demilitarisation process of the 1940s was more akin to a Faustian bargain than a zero-sum game.[888] In order to impose Miguel Alemán as President of the Republic, General Manuel Ávila Camacho was forced to negotiate intensively with the different factions that existed within the National Army. "While a marked military withdrawal from the highest levels of national politics did indeed occur, it happened both later and against significantly more opposition than hitherto believed," notes Gillingham. "It was, consequently, significantly less complete than hitherto believed, and it came at the cost of a certain continuity in the independence, rent-seeking, and petty politicking of generals and other military actors across the Mexican countryside," he concludes.[889]

Thus, many of the caciques and strongmen of the period accepted the possibility of a civilian assuming the highest office of State in exchange for their interests being respected at the local level. In fact, Gillingham concludes, what happened around the 1940s was "an exchange of national influence for institutional independence and provincial cacicazgos—an exchange that implied, moreover clear continuities with an earlier age of military politics."[890] It was precisely in this sphere that military autonomy remained untouched, especially because the orientation of the Mexican revolutionary State favoured the emergence of a strategic culture that dispensed with the projection of force to the outside world. Rather, its utility as a coercive tool of internal order was reinforced by the negotiation process that made the army a central resource for the modernisation project conceived from Mexico City:

> The army continued to play a critical state-building role, ensuring rural control and 'softening up' local societies for bureaucratic domination. Yet the hidden costs, the soldiers' 'residual political roles,' could —as David Ronfeldt has argued— add up to a quasi-independent, parallel government structure or a 'a world,' as a recent US Embassy assessment had it, 'largely separate from the resto Mexico.'[891]

Thus, the regime's solution to the Mexican military question was not an explicit civil-military pact, but a negotiated solution at the highest level of political decision-making that over time generated

[888] Paul Gillingham, "Military *Caciquismo* in the PRIísta State: General Mange's Command in Veracruz" in Ben Fallaw and Terry Rugeley (eds.), *Forced Marches: Soldiers and Military Caciques in Modern Mexico*, Tucson, The University of Arizona Press (2012), p. 213
[889] Loc. cit.
[890] Loc. cit.
[891] Loc. cit.

structural consequences: a certain way of conceiving the place of the military in Mexico's public life fed by a narrative that even today still shapes many of the country's strategic scripts.

The quest for a balance: historical experience and strategic culture in the Mexican case

This dissertation sought to point out that the shaping of Mexico's grand-strategic behaviour throughout the last century finds a starting point in the revolutionary experience that the country underwent after 1910. Following Luttwak, the document sought to highlight the fact that this strategic behaviour rested on the use of tools that have not been unknown in other societies: resorting to persuasion, no less than the use of armed force, is a historical constant that also concerns the Mexican case. [892] At the same time, this dissertation also drew on the work of Professor Jeremy Black to argue that the possibility of resorting to the use of the military instrument to address domestic needs is no less strategic than its external projection.[893] In doing so, the relevance of resorting to the notion of «strategic culture» becomes meaningful when talking about the Mexican case, especially since this term allows us to locate the strategic behaviour of the Mexican revolutionary State as the result of a certain historical experience which transcends anything that is merely fortuitous or contingent.[894] In this way, the notion of strategic culture can be understood as the product of a context that exerts a determining influence on the politico-strategic behaviour of any organised polity. Therefore, in the context of this dissertation, the term has been used in a broad sense: not only to refer to the way in which the utility of force was understood by the Mexican decision-makers, but also as a devise aimed at understanding the way in which an early revolutionary experience shaped the strategic behaviour of the State that emerged in Mexico in the aftermath of the great civil war of 1910.

Against this background, between 1917 and 1929 the new Mexican revolutionary state laid the foundations of a political order that had to deal with two dimensions of the same strategic problem:

[892] According to Luttwak, strategy can be understood as "the application of method and ingenuity in the use of both persuasion and force." Ultimately, it is a method that pertains to strategy "in all its aspects, from higher statecraft down to military tactics." Edward N. Luttwak, "Preface" in *The Grand Strategy of the Byzantine Empire*, Cambridge, The Belknap Press (2009), p. ix

[893] Jeremy Black, "Setting military objectives" in *Rethinking Military History*, London, Routledge (2004), pp. 132-33

[894] Jeremy Black, "Preface" in *Military Strategy: A Global History*, New Haven, Yale University Press (2020), pp. xv-xvi

1) how to accommodate the political and military energies released by a great civil war and, at the same time, 2) how to cope with the world order that was conceived at the Paris Conference of 1919. The decisions taken by Mexico's political and military leaders in the period established precedents that laid the foundations for the strategic scripts that subsequently guided their country's behaviour throughout the last century. Accordingly, the problems considered by this dissertation reveal the origins of a national security architecture that was originally created to respond to the needs of a markedly authoritarian regime. For instance, it is important to emphasise the impact of the historical experience of Sonora on the establishment of the Constitutionalist Army, especially due to the role played by Álvaro Obregón in the dispute between the civilianists and the militarists factions of the Revolution that finally led to the fall of Venustiano Carranza's government in the spring of 1920. It is no less important to discover that, once in power, the Sonorans took the decision to seize from local governments the prerogatives they had won in the context of the civil war, thus annihilating the old militia tradition on which the notion of the «citizen soldier» rested in Mexico. This should be placed in the context of a broader historical phenomenon: the tendency to centralise in Mexico City all of the powers on which the maintenance of internal order in Mexico depended.

One century later, the consequences of what happened in those years are still significant: at present, the Mexican public security model still relies on the constant deployment of federal troops, a fact that has made evident the structural weakness of the law enforcement agencies that depend on local authorities. On the other hand, the Mexican experience of the first decades of the last century was also defined by another central fact: the consolidation of a national security model oriented towards the persecution of domestic enemies.[895] In this context, the experience of the Cristero War was decisive, especially because the practice of counterinsurgency became one of the most enduring strategic lessons learned by the Mexican armed forces. This resource was used intermittently in subsequent decades, but in the early 1960s it resumed the centrality it had enjoyed in the late 1920s. From 1965 onwards, the governments of the Mexican Revolution had to confront a new phenomenon: the proliferation of armed insurgencies driven by a Marxist-inspired programme of revolutionary change.[896] The result was particularly bloody: a low-intensity conflict

[895] César Valdez, *Enemigos fueron todos: vigilancia y persecución política en el México posrevolucionario (1924-1946)*, Mexico City, Bonilla Artigas (2021), pp. 45-90
[896] Camilo Vicente Ovalle, *Tiempo suspendido: Una historia de la desaparición forzada en México, 1940-1980*, Mexico City, Bonilla Artiga (2019), pp. 51-68

fought under the shadow of the political hegemony on which the authority of the Institutional Revolutionary Party rested in those years.

All these elements ultimately converge in a particular confabulation: the thesis that the «authoritarian civilianism» that emerged in Mexico around the 1940s was a deliberate outcome of the hegemonic project imagined by General Calles around 1929. The way in which the work of General Joaquín Amaro has been considered throughout the last century is illustrative in this respect. Thus, in 1968 —that pivotal year in Mexico's public life, as Octavio Paz famously put it— Edwin Lieuwen did not hesitate to cast Amaro's legacy in a favourable light, pointing out that the Mexican general had been committed "to change the army from a vehicle for advancing one's political aims into a non-political Institution which would restrict itself to the military tasks of defending the nation against internal and external threats."[897] In October of the same year, government troops fired on civilians who had gathered in the Plaza de las Tres Culturas in Tlatelolco to support the student movement that emerged in the summer, demonstrating the growing dysfunctionality of an order of things that by then was beginning to exhaust the sources of its political authority.[898]

The conclusions Lieuwen presented that year regarding the professionalisation process of the Mexican army were established in the previous decade: in 1958, the American historian pointed out that by then Mexico had successfully shaken off the shackles of militarism: "No Latin American army was more political until a quarter century ago," wrote Lieuwen. "Today the armed forces are virtually apolitical. Mexico has thus moved from one extreme to the other."[899] To a large extent, he concluded, this happy circumstance was the result of the bold steps took by Amaro and his group of reformers in the previous years: the first one "was taken in 1926 with the creation of a Commission of Military Studies, the final one in 1932 with the organization of a War College, under French professional influence, to train the superior senior officers for general staff duty."[900] However, events in the two decades that followed Amaro's arrival as Secretary of War seem to belie

[897] Lieuwen, p. 93. As for the significance of what the Mexican poet said about what happened in 1968, see Octavio Paz, "Olimpiada y Tlatelolco" in *Posdata*, Siglo Veintiuno Editores (1970), pp. 21-42
[898] By choosing the path of violence to silence citizens' demands, "the government returned to earlier periods of Mexican history: aggression is synonymous with regression," noted Paz in 1970. Ibid., p. 40
[899] Edwin Lieuwen, "Curbing Militarism in Mexico," *New Mexico Historical Review*, vol. xxxiii, no. 4 (1958), p.257
[900] Ibid. Liuewen, p. 267

Lieuwen's optimistic conclusion: the process that allowed for the consolidation of a professional military instrument in Mexico ran parallel to a tense political dialogue between civilians and the military well into the 1950s. At times this tension threatened to put an end to the constitutional order haphazardly established in the early days of the century. Still in 1952, the fact that General Miguel Enríquez Guzmán decided to run for the presidency of the Republic while leaving the corporate structures of the Institutional Revolutionary Party created serious fractures within the Mexican High Command.[901] The fact that Enriquez Guzmán's supporters were systematically repressed in the months leading up to the presidential elections of that year is indicative of the tensions on which «Mexican exceptionalism» rested throughout much of the twentieth century.

More recently, Robert Carriedo advanced an additional argument: Amaro's success rested on a strategy of professionalisation that had as its foundation "a process of cultural reeducation that replaced an entrenched tradition of militarism with one emphasizing such values as discipline, duty, honor, and loyalty to the civilian government."[902] Carriedo's claim finds a solid foundation in Amaro's work, especially because it recognises the impact of his initiatives over the process that created the strategic culture which governed the behaviour of the Mexican Army throughout the last century. However, it is a claim that also merits critical review: Carriedo assumes that Amaro's legacy was entirely virtuous, but is silent on the accumulation of contradictions that generated the new strategic culture within the Mexican Armed Forces. Thus, Stephen Wager's meeting with a Mexican general in 1991 is cited by Carriedo as evidence of the enduring influence of Amaro's work: when referring to the role of the Military College in the training of future Mexican officers, the general pointed out that the institution "receives cadets an impressionable age, tells them that they represent the values of the Mexican Revolution, and convinces them that they are the loyal servants of the Mexican people."[903] Therefore, when Carriedo noted that the Mexican military was loyal to the *civilian government*, he was actually speaking about the government of the Mexican Revolution —in other words, about an authoritarian government.

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[901] Gillingham, Op. cit., pp. 224-26

[902] Carriedo, Op. cit., p. viii

[903] Significantly, another of the commanders consulted by Wager noted that the Military College "had no specific political or ideological orientation but only taught cadets to respect their country and its institutions." In other words, from the point of view of the officer corps trained at the College, the values of the Mexican Revolution are, in fact, those of the fatherland itself. Stephen J. Wager, *The Mexican army, 1940-1982: The country comes first*, Stanford, Stanford University, PhD Dissertation (1992), p. 109, quoted by Carriedo in Ibid., p. 235

As a result, Mexican soldiers were the servants of the Mexican Revolution, but also its most dedicated guardians. By resorting to the rhetoric of «revolutionary nationalism» that prevailed throughout the last century in Mexico, the army saw itself as the guardian of the regime established at the end of the great civil war of 1910.[904] A regime that, on the other hand, conferred inordinate powers to the presidential investiture, thus allowing the consolidation of an "authoritarian civilianism" that relied on a hegemonic party that was obliged to negotiate with the military the arrangement on which Mexico's post-war political stability ultimately rested.[905] Therefore, when Carriedo concluded that Amaro's legacy resulted in the existence of a professional and loyal army, unconditionally subordinated to civilian power, his conclusion must be qualified in view of these circumstances.[906] Ultimately, the professionalism displayed by the Mexican army throughout the twentieth century rested on its loyalty to the values of the authoritarian regime that was forged in the early days of the century. The fact that these values have not been openly challenged in the context of the political reform process that began in 1977 is particularly worrying: over the years, Mexican military exceptionalism has become an expression of the dysfunctionality of Mexico's security and defence architecture, especially as the Mexican political class has been unable to ensure effective democratic civilian control over the country's armed forces.[907]

Moreover, the call to study the true scope of the Mexican military question today must be coupled with an invitation to question some of the most persistent claims about the way in which Mexico's strategic culture was consolidated during the second half of the last century. With respect to the field of «national security», or rather the conceptual vocabulary that underpins it in Mexico, it is common to assert that the term entered the national public discourse in the early 1980s, when it

[904] Rodríguez Sumano, Op. cit., pp. 75-77

[905] The term was originally coined by Rouquié in 1982. "In fact, the military are in a certain way one of the pillars of the coalition along with the PRI, the presidency, and the trade unions." Alain Roquié, "Civilian Authoritarianism and the Demilitarization of Political Life in Mexico" in *The Military and the State in Latin America*, Berkeley, University of California Press (1987), p. 206. For a more recent approach to this subject, see Thomas Rath, "Camouflaging the State: The Army and the Limits of Hegemony in PRIísta Mexico, 1940-1960" in Paul Gillingham and Benjamin T. Smith (eds.), *Dictablanda: Politics, Work, and Culture in Mexico, 1938- 1968*, Durham, Duke University Press (2014), pp. 89-107. Cf. with Soledad Loaeza, "Modernización autoritaria a la sombra de la superpotencia, 1944-1968" in Erik Velásquez García et al., *Historia general de México ilustrada*, vol. ii, Mexico City, El Colegio de México (2010), pp. 348 y 355

[906] Carriedo, Op. cit., p. 237

[907] Jordi Díez, "Civil-Military Relations in Mexico: The Unfinished Transition" in Roderic Ai Camp (ed.), *The Oxford Handbook of Mexican Politics*, Oxford, Oxford University Press (2012), pp. 1-23

was gradually introduced into the guiding documents of the Mexican State's security policy.[908] According to Sergio Aguayo, the National Development Plan of President Miguel de la Madrid's administration (1982-1988) "represents the first effort to give an explicit and different content to what is understood by national security." [909] Indeed, one of the merits of that document was to conceive of national security as a tool at the service of development, guided by the need to "maintain the condition of freedom, peace and social justice within the constitutional framework."[910] The plan thus called for the formulation of a "comprehensive security policy" capable of reconciling the Mexican State's foreign policy aims with the demands of domestic development.[911] This, however, did not happen in any discernible way: by then the inertias of the strategic culture which Mexico consolidated in the previous decades were too strong.[912] In fact, the divorce between the foreign policy agenda and the security and defence agenda remains one of the central features of Mexico's strategic behaviour.

Nonetheless, the thesis that 1980 marked a turning point in the matter deserves to be reviewed in the light of the documentary evidence now available to us. In fact, a noted Mexican scholar pointed out some time ago that the term «national security» was already used by General Luis Alamillo Flores in the 1940s.[913] Referring to the role of the Superior War College in the training of officers intended to assume General Staff duties, the General stressed that one of the most important purposes of the institution was to ingrain in the students "the desire to possess a military culture as broad and solid as required by national security and the contemporary development of military

[908] Sergio Aguayo notes, for example, that the expression "security of the nation" was introduced in the Interior Ministry's Internal Regulations in 1973, with the aim of giving the Federal Security Directorate a clearer mandate in this area. For its part, the *Plan Global de Desarrollo 1980-1982* used the term when referring to the armed forces, "confusing security with national defence." Sergio Aguayo, "Los usos, abusos y retos de la seguridad nacional mexicana, 1946-1990" in Sergio Aguayo and Bruce Bagley (comps.), *En busca de la seguridad perdida*, Mexico City, Siglo Veintiuno Editores (1990), pp. 115-116

[909] Ibid. Aguayo, p. 116

[910] *Plan Nacional de Desarrollo*, Mexico City, Diario Oficial de la Federación (31 May 1983), p. 61.

[911] Ibid. Aguayo, p. 117. The original wording of the plan reads as follows: "Given that, from the perspective of the National Project, there is an underlying unity between domestic activities and international relations, it is appropriate to formulate a comprehensive security policy, based externally on the purposes of peace and justice of our foreign policy and on comprehensive development in the internal sphere." Op. cit. *Plan Nacional de Desarrollo*, p. 61

[912] Aguayo himself admits this when he points out that, despite making reference to the external sphere, the plan only included a set of internal actions as specific issues. Op. cit. Aguayo, p. 117

[913] Abelardo Rodríguez Sumano "De la Revolución a la institucionalización de la estabilidad y l seguridad nacional en México y la relación con Estados Unidos (1928-1943)" in *La urgente seguridad democrática*, Mexico City, Taurus (2008), p. 74

science at the service of the institutions."[914] The fact that Alamillo was aware of the importance of these notions should come as no surprise: from 1925 onwards, Captain Luis Alamillo Flores became the closest disciple of General Joaquín Amaro, the man with whom he worked hand in hand thereafter to promote a substantive transformation of the Mexican military instrument.

The road ahead: towards the return of statecraft

In April 1947, the solitary and courageous voice of Daniel Cosío Villegas pointed out, in a lucid essay originally published in the magazine *Cuadernos Americanos*, that Mexico had long been suffering from a crisis which, "as in cases of fatal illness in a family," no one was willing to talk about or which, at most, was spoken of "with a tragically unrealistic optimism." [915] With the goals of the Mexican Revolution apparently exhausted, its governments emptied of the political legitimacy they initially enjoyed due to a corruption that at the time seemed rampant, the quest for alternatives was then imposed as a requirement of national political life that was projected into the future in an uncertain way.[916]

Cosío Villegas weighed many of these alternatives with critical rigour, and his severe opinion on Acción Nacional, the party founded in 1939 by Manuel Gómez Morín to confront the official political machine, is famous, for example: "it would collapse as soon as it became a government."[917] However, the eminent Mexican intellectual also considered another option: the return of the military to public life in his country. Those soldiers who had made the revolution, he wrote, "came from the people and not from a caste," but it was no longer possible to say the same of them in 1947:

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[914] Luis Alamillo Flores, *Doctrina Mexicana de Guerra*, Mexico City, Talleres de Costa (1943), p. 35 quoted by Rodríguez Sumano in Ibid., pp. 75-76

[915] Daniel Cosío Villegas, "La crisis de México" in *Extremos de América*, Mexico City, Tezontle (1949), p. 11. As mentioned, the essay was originally published in *Cuadernos Americanos*, vol. xxxii, no. 2 (1947), pp. 29-51. I return here to a set of reflections that I originally presented in a brief commentary on the Mexican military question published in the summer of 2018 in Alexis Herrera, "La cuestión militar en México: más allá del 1 de julio," Medium (2018) [online].

[916] For an account of the political and intellectual moment in which Cosío Villegas' essay was published, see Daniela Gleizer, "Daniel Cosío Villegas. *La crisis de México* (1947)" in Carlos Illades and Rodolfo Suárez (coords.), *México como problema: Esbozo de una historia intelectual*, Mexico City, Siglo XXI Editores (2012), pp. 126-39

[917] Cosío Villegas, Op. cit., p. 40

> We do not know enough about those who have replaced them, but it would not be surprising if they believed, as every professional soldier believes, that they represent order and national dignity. As long as they are the only ones who believe that, so much the better; but the danger will be great if the civilians begin to share that view. Then there will be order, plenty of order; but little dignity, national or personal. [918]

For Cosío Villegas, the only ray of hope that could have turned the situation around lay in the possibility that "from the Revolution itself came a reaffirmation of principles and a purification of men." [919] This, of course, did not happen: in fact, the decisions took by the Mexican political and military leadership of the period established the precedent of a strategic behaviour that was later integrated into the undercurrents of Mexico's national political culture in a lasting and pervasive way. Powerful geopolitical realities conditioned this behaviour, contributing to the development of a singular strategic culture that indefinitely postponed the resolution of the tensions sown between the Mexican civilians and the military in the framework of the revolutionary experience of those years. As a result, the military question never found explicit recognition among the Mexican civil society nor among members of the political class that governed the country until the lasts days of the twentieth century.

Throughout the first two decades of this century, Mexico has been confronted with the arduous task of recognising itself in the daily encounter with its armed forces, that great stranger that survived unscathed the collapse of the old authoritarian regime of the past. In the framework of the «war on drugs», the decision to resort to the military instrument to confront organised crime generated an additional distortion in the Mexican strategic landscape: by conferring on the armed forces a leading role in an initiative that cannot produce lasting strategic effects, the civilians who perform the highest governmental tasks in that country abdicated the responsibility of constructing alternatives to confront a national emergency that does not respond to the criteria of a war with a trinitarian character.[920] As a result, the deployment of troops on the ground has not led to a reduction in violence; instead, the country has moved down a particularly dangerous path:

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[918] Ibid., p. 42
[919] Ibid., p. 43
[920] Eva Bertram and Kenneth Sharpe, "The Unwinnable Drug War: What Clausewitz Would Tell Us," *World Policy Journal*, vol. 13, no. 4 (1996-97), pp. 41-51, esp. p. 43. As for the Mexican case, I aimed at offering an interpretation in Alexis Herrera, "Pensar la guerra en México: Una tarea para nuestro tiempo," *Istor*, vol. xxii, no. 86 (2021), pp. 9-30

the loss of the balances on which the Mexican civil-military relations had historically rested over the last century.[921]

Mexico's experience over the first two decades of this century suggests, however, that the country is now facing an urgent debate: the need to decide what the true utility of force should be for the future. This is especially relevant because the use of the military instrument in law enforcement tasks has created grievances that can only be addressed with the cooperation of Mexican society as a whole and of the armed forces themselves, especially if they are to assume a role as guarantors of the country's defence in the twenty-first century world. Moreover, a basic exercise in historical memory also requires soldiers and civilians to engage in a mature dialogue about the issues that have distanced them from each other in the recent and distant past.

To advance along this path would be to say that the country has been able to avert the dangers that Cosío Villegas identified in that essay published nearly eighty years ago: the possibility that its professional soldiers may start to believe that the construction of the future is exclusively in their hands. Conjuring that possibility is part of an exercise in political imagination that must ultimately lead to the dismantling of the confabulation that until now has fuelled Mexico's strategic scripts. In short, to advance along this route would be to open the doors to a new exercise in political imagination that, according to Viroli, once founded Machiavelli's undertakings:

> By imagination, I mean here the intellectual effort to conceive a political and moral reality that is radically different from the existing one and yet, unlike castles in the air, represents and reflects deep and historically serious aspirations and has therefore the power to move people to action and to become, at least in part, real.[922]

This is the kind of political imagination on which the possibility of recovering statecraft rests, especially when the latter is understood as an exercise in political action that demands new strategic narratives to guide a community's march towards the future. In the first decades of the twenty-first century, such narratives can and must be based on genuinely democratic principles. If

[921] See for instance Fernando Escalante Gonzalbo, "No es el pueblo," *Nexos* (2021) [online]. Cf. with Raúl Benítez Manaut, "La no reforma del sector defensa en México. El retroceso: 2008-2021" in Istor, vol. xxii, no. 86 (2021), pp. 95-118

[922] Maurizio Viroli, *Redeeming the Prince*, Princeton, Princeton University Pres (2014), p. 66

this criterion is embraced in Mexico, then perhaps Alain's assertion that the strongest power is that which would like to have the approval of the free man can be repeated in that country. "Only then," the writer reminds us, "does force leave its bayonets and want to seduce."[923]

[923] Émile-Auguste Chartier quoted by Ikram Antaki in *Celebrar el pensamiento*, México, D. F., Planeta (1999), p. 91

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