

## The Historical Context of the Mexican Expedition of 1916

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In March of 1916, Pancho Villa, seeking armaments and advantage in Mexico's Great Revolutionary Civil War, led a cross-border raid on Columbus New Mexico. Two weeks later General John "Black Jack" Pershing led the opening of what became a punitive expedition into Mexico. With few exceptions, historians tend to treat Pershing's punitive expedition either in the context of Mexican national history, emphasizing the role of revolutionary factional struggle, or in the context of American national history, as a dress rehearsal for WWI, an opportunity to field test the then new technologies of motorized transport and airpower. Here I offer a syncretic big picture that presents Pershing's punitive expedition as the last of a series of American interventions in Mexican affairs that took place from 1825 to 1920.<sup>1</sup> Washington's eventual acceptance of Mexico's great revolution was shaped, in large part, by the lessons taught Uncle Sam by Pershing's inability to discipline a revolutionary bandito.

Mexico's evolving relationship with the United States in this period may be seen in Washington's relationship with its three great strongman *caudillos* presidents – Antonio Lopez de Santa Anna, Benito Juarez and, most importantly, Porfirio Diaz. While all began as idealists, all quickly found that democratic ideals of independent judiciaries and legislatures, checks and balances, a free press and fair elections had to be sacrificed to centralist necessity to govern at all. After the Revolution, the *caudillo* system was institutionalized in a party that ruled Mexico for 75 years until 2001.

But what is a *caudillo* you ask? The *caudillo* is a product of Mexico's political-economy derived from medieval Iberian tradition whose characteristics are fundamentally different from Anglo-American traditions. Thus, Anglo-American political scientists have dubbed it the "distinct tradition."<sup>2</sup> While historians should beware the dangers of such "ideal types," they are useful

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<sup>1</sup> Two works that come close to treating Mexican-American relations in this way are John M. Hart, *Empire and Revolution: The Americans in Mexico since the Civil War* (Berkeley: University of California Press, 2002) and W. Dirk Raat, *Mexico and the United States: Ambivalent Vistas* (Athens: University of Georgia Press, 1996).

<sup>2</sup> An extensive literature on the distinct tradition evolved over 50 plus years, the roots of which are found in *Politics and Social Change in Latin America: the Distinct Tradition*, ed. Howard J. Wiarda (Amherst: University of Massachusetts Press, 1974). And more recently Wiarda, "The Political Sociology of a Concept: Corporatism and the 'Distinct Tradition,'" *The Americas* 66 (July 2009):81-106.

analytical tools if their limitations are recognized. Glen C. Dealy provides the classic description of this ideal type which he dubs *The Public Man*.<sup>3</sup> He contrasts the public man's political rationality with the North American's economic rationality. In the way that North Americans consider politics "unclean," Latins consider business and commerce "unclean." The Latin "public man" is the "surrounded man" who emphasizes the values of public leadership over making money. We may see this in differentiating the American gangster from the Latin bandit. An American gangster (e.g. Al Capone) is an illegitimate businessman out to make money while the Latin bandit, although he takes money, is really a politician who seeks popular support.

Daniel Cosío Villegas makes the same point in his renowned *American Extremes* where he contrasts North American conformity with Latin American individualism. This is something of a paradox. Although the Latin political tradition is corporatist, stressing the role of the state in achieving the collective good, the individual is the point of expression, while North Americans, although embracing individualism and democratic ideals, are defined by their social groups. Institutions—especially political institutions—are weak; personal relationships, the basis of the *caudillo's* power, are strong.<sup>4</sup> Thus a series of American investors and US presidents seeking a relationship with Mexico found necessary to pretend that democratic institutions functioned there even as they found there were advantages in dealing with (hopefully) compliant strongmen.<sup>5</sup> And Americans were deeply involved in Mexican political affairs competing with the British for influence from the time Mexico became independent in 1821. Joel R. Poinsett, America's first minister to Mexico, helped establish the secular liberal pro-American *puro* party. He did this by chartering a liberal York Rite Masonic Order to counter the political influence the British exercised over conservatives through the Scottish Rite of Masonic Order. That both liberals and conservatives organized around secret fraternal orders did not bode well for the nation. But the Americans would adjust.<sup>6</sup>

The first of our three caudillo presidents, Gen. Antonio López de Santa Anna, was a political opportunist who served 12 times as president, shifting his allegiance from faction to faction with bewildering rapidity. He began as a liberal, forcing the Emperor Augustin de Iturbide from power and establishing a republic. In 1829, he became a national hero by turning back a Spanish invasion of Tampico. Liberal factional struggles led to Santa Anna's election as

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<sup>3</sup> Glen C. Dealy, *The Public Man: An Interpretation of Latin American and Other Catholic Cultures* (Boston: University of Massachusetts Press, 1977) and his *The Latin Americans: Spirit and Ethos* (Boulder: Westview Press, 1992).

<sup>4</sup> (Austin: University of Texas, 1964)

<sup>5</sup> For more on this, see my classic *Integral Outsiders: The American Colony of Mexico City, 1876-1911* (Wilmington, DE: Scholarly Resources, 2001).

<sup>6</sup> See Schell, "Life Sketches of the American Colony," in *Integral Outsiders*, 1-29; Also, Despatch 94, Joel R. Poinsett to Henry Clay, received July 8, 1827, in James F. Hopkins et al., ed., *The Papers of Henry Clay*, 7 vols. (Lexington, KY, 1963-1982), VI:752-753 (hereinafter cited as PHC by volume). Matias Romero, *Mexico and the United States* (New York, 1898), 349, denied Poinsett had anything to do with the founding of the Yorkino lodges. Poinsett said otherwise. Poinsett to Clay, received Jan. 7, 1826, PHC, V:14.

president on April Fools Day 1833 but government bored him so he retired to his Veracruz hacienda leaving his *puro* VP Gómez Farías to carry out radical liberal reforms and to take the political heat. When Santa Anna saw the depth of conservative opposition to reform, he dissolved the government and congress, put aside the constitution, and centralized power to create a dictatorship.<sup>7</sup>

When the *purros* resisted, the dictator exiled them including one, Lorenzo de Zavala, who fled into Texas territory, which had been opened to yankee settlement. There Zavala encouraged yankee settlers and Tejanos (Hispanic residents) upset by Santa Anna's dictatorship to rebel. Thus was born the short-lived Lone Star state of Texas with David Gouverneur Burnet as president and Zavala as vice president. Zavala hoped that a blended liberal Mexican/yankee state would emerge that might act as a barrier between Santa Anna's conservative state and an increasingly expansionistic United States.<sup>8</sup>

Every schoolgirl and boy knows what happened next. In 1836 the dictator Santa Anna moved to crush the Texas rebels. He overwhelmed the Alamo and slaughtered its defenders; he gave no quarter in his victory at the Battle of Goliad. When at last Sam Houston managed to field an army, Santa Anna was defeated at the battle of San Jacinto and forced to sign treaties ceding Texas to the Americans and their Tejano allies. Exactly what constituted Texas, however, was not clear and, in any case, the new liberal government in Mexico City rejected the treaties.<sup>9</sup>

Santa Anna then went into exile in the US. When the political situation allowed, the Americans returned Santa Anna to his Veracruz hacienda aboard a US warship. When French forces landed near his Veracruz hacienda to collect debts owed a French baker, Santa Anna came out of retirement to lead Mexican forces against a small French force in what became known as the Pastry War. He repulsed the invaders, losing his left leg to shrapnel in the process. He later buried his leg with full military honors. His prestige restored, a grateful nation again made him president only to drive him from power for corruption again in 1844. Again, he sought exile, this time in Cuba, leaving Mexico bankrupt and in turmoil.<sup>10</sup>

In 1845, the US annexed Texas provoking another Mexican political crisis. Seeing opportunity, American president James K. Polk offered to forgive the 4.5 million-dollar debt Mexico owed the U.S. and to pay an additional \$30 million for California and New Mexico. The offer was refused. What Polk could not buy he took by force in the Mexican-American War (1846-1848). In this, Santa Anna aided the Americas. When he promised to negotiate an end to the war and sell the New Mexico and California territories to the Americans they allowed him to pass through their blockade. Upon his arrival, desperate Mexicans made Santa Anna

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<sup>7</sup> This is a narrative found in all surveys of Mexican history. Two of the best are Michael C. Meyer and William L. Sherman, *The Course of Mexican History* (New York: Oxford University Press, 1991); Enrique Krause, *Mexico: Biography of Power: A History of Modern Mexico, 1810-1996* (New York, Harper Perennial, 1997).

<sup>8</sup> The classic account upon which so many other historians rely is Henry B. Parks, *A History of Mexico* (Boston: Houghton Mifflin, 1970), 192-197.

<sup>9</sup> Parks, *Mexico*, 202-203.

<sup>10</sup> John S.D. Eisenhower, *So Far from God: the US War with Mexico, 1846-1848* (New York: Double Day, 1989), 14-16.

commander of their armies. The general then (inexplicably) proceeded to lose every battle allowing the Americans to take control of the country easily. Santa Anna again went into comfortable exile—this time in Jamaica. In the Treaty of Guadalupe Hidalgo ending the war, Mexico was paid \$18,250,000 but lost 50% of its national territory—California, Nevada, Utah, and parts of Colorado, Arizona, New Mexico, and Wyoming.

Mexico was again in turmoil. *Puro* liberals sought American annexation while conservatives sought a monarchy. Unable to agree, both sides decided only Santa Anna could unite the country and again returned him to power. Assuming the title Most Serene Highness, Santa Anna imposed a dictatorship and exiled Benito Juárez and other liberals. To support his extravagant regime, he raised taxes and sold more territory to the United States (Gadsden Purchase). Enraged, liberals deposed Santa Anna for the last time in the Ayutla Revolution initiating *La Reforma* embodied in the *Ley Juárez*, abolishing military and ecclesiastical *fueros* (special legal privileges) and the *Ley Lerdo*, which privatized corporate church and village properties. The liberal 1857 Constitution was then adopted and elections held. Conservatives did not like the outcome and rebelled initiating the Wars of Reform.<sup>11</sup>

Our second caudillo president, Benito Juárez, led the liberals to victory but the Wars of Reform bankrupted the country. Juárez had to suspend payments on Mexico's foreign debt. While the other great powers were content to seize the Veracruz customs house, the ambitious French emperor, Napoleon III, used non-payment as an excuse for military intervention to install a pro-French government. His goal was to increase French influence in Latin America (a term he invented to suggest the commonality of French and Spanish civilizations and their common opposition to Anglo-Saxon civilization). America, then fighting its own Civil War (1861-1865), was unable to enforce the Monroe Doctrine.<sup>12</sup>

The first French expedition was defeated by Gen. Porfirio Díaz at the Battle of Puebla on 5 May (the origin of the American holiday of Cinco de Mayo). But Napoleon increased his forces driving Juárez from Mexico City to the northern border states and forcing him to governing (if that is the right term) from his famous black Landau carriage as he moved from place to place. Napoleon also sought a friendly Catholic monarch to become emperor of Mexico. This he found in May 1864 in the person of Maximilian von Habsburg, brother of Austrian Emperor Franz Josef. Following a sham election to satisfy Maximilian, the new emperor arrived with his wife Carlotta to take the Mexican throne. But Maximilian was too liberal for Mexican conservatives and Juárez would not accept his offer to become prime minister. Maximilian thus had no support. When the American Civil War ended, Washington forced the French to withdraw. Maximilian's forces were then defeated and the emperor was captured and shot in 1867.<sup>13</sup>

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<sup>11</sup> See Will Fowler, *Santa Anna of Mexico* (Lincoln: University of Nebraska Press, 2009), 287-345.

<sup>12</sup> Ralph Roeder, *Juárez and His México, a Biographical History - Complete in Two Volumes* (New York: The Viking Press, 1947), 383-516.

<sup>13</sup> For a solid overview of the Empire see Mary Margaret McAllen Amberson, *Maximilian and Carlota: Europe's Last Empire in Mexico* (San Antonio: Trinity University Press, 2014).

At war's end a grateful nation permitted Juárez an unconstitutional fourth term and he began a liberal state-building project characterized by close cooperation with the United States. In 1871, when he ran again, Porfirio Díaz invoked the constitutional principle of no reelection and initiated his *la Noria* Rebellion. But when Juárez died of a heart attack, Díaz accepted amnesty from Sebastián Lerdo who as Supreme Court Chief Justice served out Juárez's term. When Lerdo announced for president again in 1876, Díaz launched his successful *Tuxtepec* Rebellion, again invoking the constitutional principle of a real vote and no reelection.<sup>14</sup>

Our last caudillo, Porfirio Diaz, was perhaps Latin America's most successful dictator. It is likely Diaz began as something of an idealist. I believe this because at end of his first term in 1880, he did something no Mexican president had ever done. He obeyed the constitution and oversaw Mexico's first free election, won by the one-armed general, Manuel González. After González, Diaz was again elected. The 1857 Constitution allowed non-sequential terms but Diaz wanted to succeed himself. Always one for legal niceties, Diaz had congress amend the constitution that he might be repeatedly (and legally) reelected. He became Mexico's longest serving president who oversaw a period of rapid modernization through foreign investment known as the Porfiriato. He held office until 1911 when he was toppled by the wealthy hacendado, Francisco Madero. It was Madero's failure to consolidate power that led to Mexico's Great Revolution, which provoked Pershing's punitive expedition. Perhaps ironically, when revolutionaries finally restored stability, it was by institutionalizing the Porfirian system.<sup>15</sup>

Caricatured as Caesar Augustus by the feisty popular journal *El Hijo del Ahuizote*, Diaz was a republican monarch, his regime a synthesis of pragmatic Bourbon methods and liberal republican ideals whose "social dictatorship" was accepted as legitimate by the political elite in so far as it marked a transition to effective constitutional government. Diaz made himself the keystone of what historians Philip Corrigan and Dereck Sayer would call the "great arch" of the Mexican state. He changed his birthday to coincide with the anniversary of Hidalgo's revolt. Public celebration of his victory over the French at Puebla, Cinco de Mayo, replaced the 1848 defeat by the yankees as the core of a confident new Mexican nationalism. The martyred Chapultepec cadets were now remembered as part of a pantheon of Mexican heroes - Cuauhtemoc, Hidalgo, Morelos, Juarez and Diaz of whom Diaz was the only one who still lived. When the revolution began in 1910, most Mexicans knew no other president. As much by longevity as by design, Diaz came to embody the nation. In Weberian terms, he "routinized" his charisma.<sup>16</sup>

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<sup>14</sup> See my "Emiliano Zapata and the Old Regime: Myth, Memory, and Method," *Mexican Studies/Estudios Mexicanos* 25:2 (2009), 353-358.

<sup>15</sup> An excellent brief account of this familiar narrative is John Mason Hart, "The Mexican Revolution, 1910-1920," in *The Oxford History of Mexico*, ed, William H. Beezley and Michael C. Meyer (Oxford: Oxford University Press, 2010), 409-436.

<sup>16</sup> I believe my "Politics and Government: 1876-1910" in *Encyclopedia of Mexico: History, Society, and Culture*, ed. Michael S. Werner (Chicago: Fitzroy Dearborn Publishers, 1997), 1111-1117 is the best short account of Porfirian politics and government.

Diaz's initial submission to the principle of no reelection redounded to his authority as an impartial arbiter. By his own surrender of power, Diaz established conditions for the rotative management of *camarillas*. He shifted favor from military authorities (*caudillos*) to civil authorities (*caciques*) and shifted responsibility for internal security from the army to *rurales* and *jefe politicos* who also served, along with increasing numbers of schoolteachers, to introduce the *porfirian* secular culture of nationalism and modernity to the towns and villages and to the masses. Foreign-led economic growth provided the material basis of order and, reciprocally, order (or the appearance thereof) begat more economic growth. Foreign investors, all personally loyal to Diaz, became integral to the structure of *porfirian camarillas* (integral outsiders) forging cross-cutting economic ties that lessened divisions between "los ins y los outs." In Diaz's words: *mucha administracion y poca politica* which became the basis of the *pax porfiriana* (Porfirian peace).<sup>17</sup>

The regime's early economic architect was *puro* Matias Romero, minister to Washington, and who also shaped Diaz's foreign policy. His program of defensive modernization was calculated to make the best of Mexico's geopolitical reality (famously characterized by Diaz as "so far from God, so close to the United States") by encouraging a "peaceful invasion" by North American capital. Romero predicted Mexico would "naturalize" American capital and colonists "as rivers entering the sea" to provide "all possible advantages of annexation without ... its inconveniences." Low politics (trade, technology transfer, investment, finance) dominated U.S.-Mexican relations: Mexico sought national strength through economic development ~ an internal hegemonic project, whereas Washington sought markets and geopolitical influence ~ an external hegemonic project. A key agent in this operation was Paul Hudson and his *Mexican Herald*, a subsidized semi-official publication of the American business establishment that represented the Porfirian regime's interests to Washington. American ambassadors routinely forwarded the *Herald's* opinions to the State Department as their own making it a vital back-channel to Washington as the Diaz regime attempted to moderate growing Yankee imperialism while continuing to promote American investment.<sup>18</sup>

The year 1898 was a domestic and geopolitical watershed for the regime. With Romero's death and the coming of the Spanish-American War, the specter of Yankee imperialism moved Diaz to cautiously oppose Washington's hemispheric ambitions. The architect of this change was Finance Minister José Ives Limantour, leader of a group of technocrats known as the *científicos*, Limantour systematically off-set American direct investment with European. He reformed banking laws by linking chartered banks to the Banco Central Mexicano personally negotiating its capitalization by a syndicate of the Deutsche Bank and Bleichroeder. He sharply limited American participation by J.P. Morgan in Mexico's debt and required state governments to stop floating bond issues through American banks.<sup>19</sup>

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<sup>17</sup> Ibid.

<sup>18</sup> Ibid. and *Integral Outsiders*. 1-29, 113-136.

<sup>19</sup> Schell, "Politics and Government," 1111-1117 and *Integral Outsiders*, 79-101.

Limantour also convinced Diaz to pick British investor Sir Weetman Pearson over American magnate Collis P. Huntington to complete the strategic trans-isthmian Tehuantepec Railway and build its terminal ports ~ real competition for America's proposed Panama Canal. In 1906, he awarded to Pearson petroleum concessions designed to turn Mexico into an oil exporter, ending Pierce-Waters (Standard) Oil's monopoly and beginning a cutthroat "oil war" in Mexico. In 1909, Mexico amended its mining code to vest subsurface mineral rights in the state. All of this had the effect of reducing support for the regime within the American business community. Even so, yankee capital continued to pour into Mexico, increasing from \$250 million in 1906 to \$1 billion in 1910.<sup>20</sup>

Just as Limantour and the *científicos* acted to limit American political and economic influence, President Teddy Roosevelt and his Secretary of State Elihu Root sought to use Diaz as an American tool to stabilize Central America and the circum-Caribbean region where revolutions and suspension of debt payments constantly invited European intervention. For Roosevelt, the climax came when Germany's naval blockade of Venezuela degenerated into quasi-war prompting his Big Stick address in 1904. Yet even as Roosevelt fashioned his Big Stick, he searched for a way to affect imperium indirectly with Mexico's help. Roosevelt offered Diaz Washington's support for the creation of a "Greater Mexico" to extend Diaz's *pax porfiriana* over Central America as a cat's-paw for U.S. hegemony. In effect, Roosevelt, a former police commissioner, envisioned Mexico as a hemispheric "beat cop" with Uncle Sam as judge. This was the "speak softly" part of Roosevelt's Big Stick—a policy subtler than generally realized. Diaz resisted, however, offering his own hemispheric doctrine of collective security and arbitration. It was not until Roosevelt agreed to a broad interpretation of Neutrality Acts to suppress and arrest Diaz's political enemies in the US, that Diaz agreed to use Mexico's embryonic navy as "moral force" in support of Roosevelt's actions in Central America.<sup>21</sup>

As Mexico negotiated the shape of emerging American imperialism, the most urgent political problem Limantour and the *científicos* faced was "who after Diaz?" The dictator was old and succession was not clear in part because there was no office of Vice President. Thus, the *científicos* forced Diaz to create the office as the quid pro quo for their support in extending the presidential term to six years and for his sixth reelection. Diaz imposed the corrupt Ramon Corral knowing that no one would want him as president. Thus, the problem of "who after Diaz" remained troubling to thousands of foreign investors with millions invested in Mexico and agents of these foreign governments collaborated with President Roosevelt, regime insiders and prominent foreign investors to solve it.<sup>22</sup>

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<sup>20</sup> Ibid.

<sup>21</sup> Schell, "Politics and Government," *Integral Outsiders*, 137-149; and "Porfirian Dollar Diplomacy and Pacific Hegemony: Mexico, America and Meiji Japan," 54<sup>th</sup> Rocky Mountain Conference for Latin American Studies, Santa Fe, 2007.

<sup>22</sup> Schell, "Politics and Government," 1111-1117.

In October of 1907, US Secretary of State, Elihu Root, visited Mexico for ten days. Washington and the Diaz regime billed it as a goodwill tour, but Root's real mission was to coax Diaz into retirement so that Diaz might preside over the 1910 elections as Mexico's grand elder statesman insuring a smooth transition and protecting foreign investment. In conjunction with Root's visit, Diaz was convinced by Mexico's ambassador Enrique C. Creel, Thompson, and Roosevelt to give an interview to James Creelman of *Pearson's Magazine*. In the interview published in March of 1908, Diaz reportedly told Creelman that he would not seek reelection and would welcome the formation of an opposition party.<sup>23</sup>

The Creelman interview revived independent political discourse in Mexico. Andres Molina Enriquez published *Los Grandes Problemas Nacional*, a devastating analysis of the regime's social and agrarian failings. Francisco Madero launched his national anti-reelectionist movement with the publication of *La Sucesion Presidencial en 1910*, a relatively mild political critique compared to the no-holds-barred attack loosed on the Diaz system by muckraker journalist John K. Turner in his "Barbarous Mexico" series which appeared in the popular *American Magazine* throughout 1909. Turner's attack caused the regime's factions to close ranks to maintain the security of Mexican investments and national honor.<sup>24</sup>

When Diaz told Creelman that he would not run and promised real elections, the Mexican economy was still strong, but, by the time the interview appeared in early 1908, global recession had hit Mexico. Diaz's commitment to retirement, never strong, faltered. After a brief experiment with managed democracy in electing the governor of Morelos, which gave rise to Emiliano Zapata and his movement, Diaz lost what little faith he had in democracy and allowed the *cientificos* to organize his reelection. But Madero did not get the message and declared his candidacy.<sup>25</sup>

As the 1910 election approached, Madero's rhetoric grew bolder. Diaz was a despot; keeping unpopular Corral as vice president would mean revolution; Barbarous Mexico was mostly true and on and on. Madero's followers, emboldened, demonstrated at Diaz-Corral rallies. Diaz resorted to tried and true *Pan o Palo*. *Pan*: in April, Madero and brother Gustavo received a railroad concession. *Palo*: in June, Madero was arrested for slandering Diaz. *Pan*: the *Circulo Nacional Porfirista* abandoned Corral and drafted a *puro* vice president; Madero was released from prison. The election was held; Diaz won.<sup>26</sup>

On the edge of the abyss, Mexico prepared for its glittering Centennial celebration. To raise money for revolution, Madero sold his guayule rubber lands to Nelson Aldrich's Intercontinental Rubber Company (associated with Standard Oil) while brother Gustavo floated

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<sup>23</sup> Schell, "The Creelman Conspiracy: Towards a Reappraisal of the Fall of the Porfiriato," *South Eastern Latin Americanist* 29 (1985): 47-63.

<sup>24</sup> *Ibid* and *Integral Outsiders*. 149-157.

<sup>25</sup> *Ibid*.

<sup>26</sup> Schell, "Politics and Government," 1111-1117 and *Integral Outsiders*, 159-192.



a 27 million peso railroad bond issue in Paris. In October, Madero slipped across the border and issued his Plan de San Luis Potosi, a classic example of the tradition rhetoric of legitimate revolt, not unlike Diaz's Plan de Tuxtepec.

At first, Diaz seemed to face just another rebellion. This time, however, the election had destabilized the internal balance of power. Diaz could not respond effectively and there was no help from Washington. Geopolitical circumstances had changed. Attorney General George Wickersham and Henry W. Taft, the president's brother, argued to suppress Madero's revolution under the Neutrality Acts. Both were silent partners in Lord Cowdray's oil company then in fierce competition with Standard Oil's Mexican subsidiary, the Waters-Pierce Oil Company. But Secretary of State Knox was swayed by his long-time associate Sherburne Hopkins, Madero's Washington representative and the attorney for Standard Oil. When Ambassador Henry L. Wilson communicated the Diaz regime's request that Washington act to halt the cross-border arms traffic, Knox's reply so narrowly defined the Neutrality Acts that Madero literally would have had to arm a warship in US waters to trigger their enforcement.

Those conducting revolution in Madero's name did so from the US with virtual impunity, Taft's mobilization of 20,000 US troops at the border notwithstanding. After the fall of Ciudad Juarez and Torreon, Diaz authorized Limantour, just returned from Paris, to negotiate with representatives of the revolution. Neither he nor Madero wished to destroy the Porfirian state, merely reform it. However, Diaz knew what appeared to be solid state structures rested, like the grand public buildings in the capital, on soft ground, rational camarilla management would have to begin anew. On 25 May 1911, Diaz resigned and departed for exile in Paris. "Madero has loosed the tiger," he said. "Now we'll see if he can ride it." As it turned out, Madero could not.<sup>27</sup>

After Madero was elected president, the wealthy hacendado failed to satisfy demands for land reform, Zapata declared against him in 1912. Madero now had to use the Federal Army to put down rebellions by his former allies and, as the situation deteriorated, a military plot coalesced against him. On 9 February 1913, army generals marched on Madero at the National Palace beginning *La Decena Trágica*—the Ten Tragic Days of street fighting. Without Washington's knowledge, American ambassador Henry Lane Wilson brought the plotters together in the Pact of the Embassy, convincing Madero's general Victoriano Huerta to change sides by promising him the presidency. Although he had guaranteed their safety, Huerta arrested and executed Madero and his vice president. Madero loyalists, Venustiano Carranza (governor of Coahuila), Pancho Villa, Zapata and others then declared against Huerta. When fighting erupted around the oil fields and port of Tampico between Huerta and Carranza's Constitutionalist forces threatening resident foreigners, the US Navy evacuated them.<sup>28</sup>

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<sup>27</sup> Ibid.

<sup>28</sup> There are a great many accounts. Some are P. Edward Haley, *Revolution and Intervention: the Diplomacy of Taft and Wilson with Mexico, 1910-1917* (Cambridge, Ma: MIT Press, 1970); John Mason Hart, *Revolutionary Mexico: The*

Woodrow Wilson, who took office six weeks after the coup, would not recognize Huerta because his seizure of power denied the democratic process. When Huerta's forces detained US sailors of the *U.S.S. Dolphin* in Tampico in April 1914, Wilson responded by sending US Marines and three Naval Rifle companies (Bluejackets) to occupy, not Tampico, but the main port of Veracruz to deprive the dictator of arms arriving there aboard the German-registered cargo-steamer *SS Ypiranga*. While the Bluejackets went for the customs house, post and telegraph offices, the Marines went for the railroad terminal, roundhouse and yard, the cable office and the power-plant. Those defenders who did not flee, distributed arms to citizen volunteers and to prisoners released from the military prison. While the landing was unopposed, the city quickly became an urban battlefield. The fighting lasted until 24 April but troops continued to arrive for weeks until the occupation force numbered over 3,000. When the fighting ended, 22 American troops were dead and 70 wounded. Both Huerta and Carranza protested the American occupation but agreed to the Niagara Falls peace plan that called for Huerta to leave the country and required Mexico pay the US no indemnity. But once Huerta went into exile and US forces had left, Carranza essentially voided the agreement. By then, however, Wilson considered the matter closed. Perhaps, it is worth noting that the 56 Medals of Honor that Secretary of the Navy Josephus Daniels awarded the participants in this action are the most ever for a single action.<sup>29</sup>

Victorious revolutionaries, with very different views of what the revolution meant, then met to form a post-Huerta government. But Carranza's conservative Constitutionalists, whose views were like Madero's, would not agree to the radical social and land reforms insisted on by Zapatistas and Villistas. Thus, began Mexico's Great Civil War (1915-1917). At first Wilson allowed all sides access to arms through the American controlled port of Veracruz but, as WWI dragged on, and neutral Mexico became an arena of struggle between British, German and American interests in what historian Friedrich Katz dubbed *The Secret War in Mexico*, Wilson came to favor Carranza's conservative Constitutionalists and eventually cut off Villa and Zapata's access to arms.<sup>30</sup>

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*Coming and Process of the Mexican Revolution* (Berkeley: University of California Press, 1987) and *Empire and Revolution: The Americans in Mexico since the Civil War* (Berkeley: University of California Press, 2002); Friedrich Katz, *The Secret War in Mexico: Europe, the United States and the Mexican Revolution* (Chicago: University of Chicago Press, 1981); and of course John Womack, *Zapata and the Mexican Revolution* (New York: Alfred A. Knopf, 1968).

<sup>29</sup> The classic on the spot accounts with very different points of view are Francisco Bulnes, *The Whole Truth About Mexico: President Wilson's Responsibility* (New York: Bulnes Book Co. 1916) and Edith O'Shaughnessy, *A Diplomat's Wife in Mexico* (New York: Harper & Brothers, 1916). More balanced are Michael C. Meyer, *Huerta: A Political Portrait* (Lincoln: University of Nebraska Press 1972); Lars Schoultz, *Beneath the United States: A History of U.S. Policy Toward Latin America* (Cambridge: Harvard University Press 1998), 237-38 and passim; Katz, *The Secret War*; Robert E. Quirk, *An Affair of Honor: Woodrow Wilson and the Occupation of Veracruz* (New York: W. W. Norton & Co, 1967).. On the ending the Veracruz intervention, see Michael Small, *The Forgotten Peace: Mediation at Niagara Falls, 1914* (Ottawa: University of Ottawa Press, 2009).

<sup>30</sup> *Ibid.* Two of the best brief accounts, both from the *Encyclopedia of Mexico*, are John Crossen, "Mexican Revolution: October 1915-May 1917" (859-862) and Jurgen Buchenau, "Mexican Revolution: May 1917-November 1920" (862-869).

Enraged by Wilson's decision, Villa raided Columbus, New Mexico with some 500 men on 9 March 1916 seeking arms, funds, and revenge. Villa burned the town and killed sixteen Americans before the 13th Cavalry Regiment, stationed at Camp Furlong near Columbus, regrouped and drove Villa back across the border. It is likely that the raid was not entirely Villa's idea, however. He was egged on by a German secret agent, Felix A. Sommerfeld, who hoped to provoke war between Mexico and the United States to keep the U.S. from entering WWI on the allied side. In response to Villa's raid, Wilson dispatched a punitive expedition commanded by General John J. "Black Jack" Pershing consisting of 12,000 soldiers supported by Curtiss JN-3 "Jenny" aircraft of the 1st Aero Squadron, cavalry, and motorized supply vehicles. Wilson and Pershing hoped the expedition, which eventually reached 419 miles into Mexico, would weaken Villa but it had the opposite effect instead turning Villa into a folk hero. His numbers swelled and anonymous corridoes were written about Pershing's inability to catch him. In my favorite, *La Punitiva*, Villa steals an airplane from the Yankees and uses it to "take them all prisoners."<sup>31</sup>

Pershing's punitive expedition, while notable for its lack of success, did serve a useful purpose in that it revealed US Army's woeful lack of preparedness for combat. In America's rapid military buildup of that accompanied its rise to empire under Teddy Roosevelt, the army had been neglected at the expense of the navy, to say the least. Planners estimated that war with Mexico would require a force of over 200,000—the total number of army forces in 1914. Thus in 1916 congress passed the National Defense Act, which allowed President Wilson to mobilize 110,000 National Guard for service on, but not beyond, the border. The action in Mexico was carried out by regular army forces and they did not do well. While Pershing publicly declared the campaign a success, privately he admitted that Villa had "outwitted and out-bluffed [him] at every turn" and that "having dashed into Mexico with the intention of eating the Mexicans raw, we turned back at the first repulse and are now sneaking home under cover, like a whipped curr with its tail between its legs."<sup>32</sup>

Although the US eventually managed to build a military that performed admirably in the First World War in Europe, in part due to lessons learned in Mexico, its Mexican experiences led Washington to accept a socialist Mexican state on its border—eventually ruled by the Party of the Institutional Revolution (PRI)—which held power for over 70 years. Washington even tolerated the expropriation of American oil wells by Lazaro Cardenas in 1938. It is unfortunate that the United States failed to apply the lessons of Mexico to its encounters with other revolutionary movements in the latter 20<sup>th</sup> century. And in the 21<sup>st</sup> century, it is unlikely that a presidential

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<sup>31</sup> Friedrich Katz, "Pancho Villa and the Attack on Columbus, New Mexico," *American Historical Review* 83:1 (1978), 101-130; James W. Hurst, *Pancho Villa and Black Jack Pershing: The Punitive Expedition in Mexico*. Westport, Ct: Greenwood Publishing Group, 2008). On the early use of airpower, see Karen M. Keehr, "Air Power in Mexico During the Punitive Expedition of 1916," *Sothern New Mexico Historical Review* 7:1 (2000), 40-48. On the role of National Guard and Reserve Forces see Major Brent A. Orr, "Borderline Failure: National Guard on the Mexican Border, 1916 - 1917 (MA thesis, School of Advanced Military Studies Fort Leavenworth, 2011).

<sup>32</sup> Andrew Ross, Kristin Ross, *Anti-Americanism* (New York: New York University Press, 2004), 34.

great wall will be anymore efficacious than force in managing our relations with Mexico. History has shown that only trade and exchange can facilitate that.

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