EDUCATION AND THE INSTITUTIONALISATION OF CONTENDING IDEAS OF THE NATION IN *REFORMA* MEXICO

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ABSTRACT

This work investigates the role that institutions play in the dissemination of the idea of the nation. Its main theoretical claim is that elite-formulated "official" ideas of the nation are always transformed by the mediating action of the institutions through which they are disseminated. Thus –it is argued here—, an examination of the operation, reach and limits of these institutions can shed light on the discontinuities in the reproduction of the official versions of the nation, as well as on the extent to which alternative formulations are diffused through institutions that escape the control of the state.

This premise provides the framework of the study of the institutionalisation of contending conservative and liberal ideas of the nation in *Reforma* Mexico (1855-1876). As in other states, in Mexico the system of public education was the principal channel for the diffusion of such ideas. Through an analysis of primary and secondary sources, the dissertation examines the reach and limits of the Mexican public education system in spreading the idea of the Mexican nation that the liberal state elite upheld.

The thesis concludes that despite the unprecedented efforts that the Mexican liberal state made to disseminate the official idea of the nation through education, the results of its educational policy were very moderate. On the one hand, structural conditions accounted for an uneven diffusion of this idea within the system of public education itself. On the other hand, the action of private schools, which were always allowed to operate by the liberal state, contributed to the spread of ideas of the nation that differed in varying degrees from the formulation that the *Reforma* wanted to promote.

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Throughout the years that this work was in the making I accumulated innumerable debts of gratitude which I am now pleased to acknowledge. I was very fortunate to have worked under the supervision of Professor Anthony D. Smith, whose gentle guidance was always a reliable compass and provided me with the space to discover what I really wanted to say. The combination of the knowledge he possesses and the respect that he always shows for the intellectual views of his students made working with Professor Smith a most enriching and enjoyable experience.

Various people both in Mexico and in London showed interest in my work and made valuable suggestions and comments. My special thanks to Enrique Florescano, Javier Garcíadiego, John Hutchinson and Alejandra Moreno Toscano.

Researching nineteenth-century Mexico is a fascinating experience. I would like to take this opportunity to thank all those people who make the tokens of the past available to the researcher. In the case of this dissertation I benefited from the professionalism of the staffs of the following libraries and archives: Archivo General de la Nación (Mexico City), Benson Latin American Collection (Austin, Texas), Biblioteca Daniel Cosío Villegas at El Colegio de México (Mexico City) and Biblioteca Nacional de México (Mexico City). At the Biblioteca Nacional de México, Liborio Villagómez allowed me to reproduce some of the documents of the Fondo Reservado, and Francisco Ziga shared with me his knowledge of the nineteenth-century textbooks contained in the library's collection.

My interest in Mexican nationalism began during the year in which, thanks to a grant from the British Council, I completed a master's degree at the London School of Economics. The Consejo Nacional de Ciencia y Tecnología (Mexico) funded my doctoral studies and the support of the Central Research Fund of the University of London enabled me to undertake archival research for this work in Mexico and Austin.

I feel privileged to have friends on both sides of the Atlantic who have always provided much needed encouragement. Here, I wish to record my gratitude especially to Atsuko Ichijo and Jessica Jacobson. José Antonio Aguilar has not only continued to be the dear friend he has been for over a decade now, but has also been a good-

hearted critic of this work. I thank him for lending me his ears and attention every time I approached him to discuss some of the views contained in this dissertation.

Without the aid of my parents, Edith and Eduardo, and of my parents-in-law, Babette and Eduard, completing this work would not have been possible. Their incessant help, patience and love kept me going through what at times appeared to be an eternal process of writing and re-writing.

Finally, I would like to express my thanks to Valentina, my daughter, and Lothar, my husband. Valentina was born and gave her first steps while this work was in progress. While I do not think she has had a less good mother because of this, I do believe she would have enjoyed more strolls and life outdoors, rather than the long hours she played by my desk during her first year of life. For Lothar I do not have enough words of gratitude. His love, unfailing support and faith in my ability to finish this work at times when I had almost given up were my greatest stimulus to continue. It is with much pleasure and love that I dedicate this work to him.

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INTRODUCTION

1867 marked the beginning of a new epoch in Mexican history. After nearly six decades of internal turmoil that followed the declaration of independence in 1810, the Liberal Party succeeded in attaining power and in establishing its –almost—undisputed authority. The victory of the liberals was, however, more than a triumph of arms. It meant, more significantly, the defeat of the Conservative Party and its traditionalist conceptualisation of Mexico. From then on, one would be tempted to assume, the liberal state would have leeway to institutionalise its own secular, civic idea of the Mexican nation among the Mexican people. Yet, as history has shown, the spread of such an idea was far from uniform. In fact, throughout the following decades and well into the twentieth century, there emerged in Mexico varied social movements that contested the idea of the nation with which the liberals had striven to imbue the population. These movements attested both to the limits of the state in diffusing its conceptualisation among the Mexicans and the success of non-state actors in reproducing alternative ideas of the nation at the popular level.[1]

The awareness of the gap that existed between the state-sponsored idea of the nation and its popular counterpart in Mexico is what originally inspired this dissertation. More concretely, the observation that, despite the Mexican liberal state's efforts to promote a specific formulation of the Mexican nation, there continued to exist, at the popular level, alternative conceptualisations of the nation that frequently mirrored the conservative one –which the liberals had militarily defeated—, led me to look for possible explanations for this divide. Having realised that the scholarly literature on Mexican nationalism and nationalism elsewhere only marginally touches upon the issue of the dissemination and propagation of nationalism among the people, I decided to focus on this aspect. I therefore came to be convinced that a significant part of the reasons for the survival and co-existence of alternative ideas of the nation over time lies in the institutions that the state uses to spread its own idea of the nation. In other words, it is my contention that by investigating the operation, reach and limits of the institutions through which the state strives to spread its idea of the nation, it is possible to shed light on the discontinuities in the reproduction of the official

[1] See: Jean Meyer, "Religión y nacionalismo" in in Cecilia Noriega Elío (coord.). *VIII coloquio de antropología e historia regionales: El nacionalismo en México.* Zamora, El Colegio de Michoacán, 1992, pp.703-718. The concept of "idea of the nation" is defined in chapter one of this dissertation.

conceptualisation of the nation, as well as on the extent to which alternative formulations are disseminated through institutions that escape the control of the state. Although formulated here to account for the Mexican case during the *Reforma* period, this argument can, I believe, be validly applied to other empirical cases.

The period covered in this dissertation is, roughly, from 1855 to 1876, twenty-one momentous years in Mexican history when a civil war between liberals and conservatives (1857-1861) first, and, later, foreign intervention and the subsequent establishment of an empire supported by the Conservative Party (1862-1867) threw the country into disarray and compelled the contending political elites of the country to enunciate their projects in clear and open terms. As will become apparent throughout this work, these projects encapsulated, in fact, two different, almost irreconcilable conceptions of the Mexican nation. The clarity and the vehemence with which these rival understandings of Mexico were formulated at this time is what renders the study of the *Reforma* period so fascinating. Now, while strictly speaking, "*Reforma*" refers to the period 1855-1867, in which the liberals set out to reform the Mexican state and society, in this thesis this designation is at times extended to cover also the years 1867-1876, a period in which the liberal elite could rule relatively unfettered after having defeated the conservatives and restored the republican institutions in Mexico. When, however, the thesis refers exclusively to the period 1867-1876, the term employed is not "*Reforma*", but rather, "Restored Republic".

To be sure, some of the concerns that animate this thesis have been dealt with in the literature, albeit from a different perspective. On the one hand, the split between state and popular nationalism in Mexico in the 1855-1867 period has drawn the attention of scholars such as Florencia Mallon and Guy P.C. Thomson, who have set out to explore the issue of "popular/peasant" nationalism during the *Reforma*. In this context, Mallon's lucid and provocative *Peasant and Nation*,[2] has argued, first, that peasants were receptive to the nationalist appeals of the struggling elites and, second, that they succeeded in articulating an alternative nationalism, which combined elements of the nationalistic discourse of the elites with local demands for land and social justice. In turn, Thomson's prolific work on the Puebla Sierra has demonstrated that indigenous communities in that area willingly participated in what has come to be seen as the patriotic struggle of the liberals, in exchange for local benefits, and that this

[2] Florencia E. Mallon, *Peasant and Nation. The Making of Postcolonial Mexico and Peru*, Berkeley, Los Angeles and London, University of California Press, 1995.

participation expanded, in turn, their awareness of the nation as defined by the elites.[3] Thus, running against the widespread belief that peasants, "illiterate, parochial and intellectually inert",[4] cannot be patriots, both Mallon and Thomson prove that "peasant/popular" nationalism existed in mid-nineteenth-century Mexico, although in a different form from elite nationalism. As Alan Knight has summarised it, "peasant/popular" nationalism represented, in fact, "a conflation of concrete local [...] sentiments and more abstract national allegiances".[5]

Mallon's and Thomson's works are certainly illuminating, for they not only show that it is possible to speak meaningfully of "popular" nationalism, but also prove that at least some of the rural folk in mid-1850s Mexico were aware, or, rather, were made aware of such an abstract notion as that of the "Mexican nation". Furthermore, both authors succeed in pointing out that peasants understood this notion in significantly different ways to the elites. Yet, what neither Mallon's nor Thomson's works do –nor is it among their declared aims to do—is explore the issue of the reproduction and survival of such alternative nationalisms over time. This, as was stated above, is a concern that underlies this dissertation.

On the other hand, the issue of institutions has received considerable attention in Richard Sinkin's remarkable work on the Mexican Reform.[6] Focusing on the process of nation-building in mid-nineteenth-century Mexico –an interest central to this dissertation—, Sinkin compellingly investigates the process of political modernisation through which the liberal elite sought to centralise authority and to create a strong state. In this context, the institutions which were conducive to this centralisation of power are thoroughly addressed in his work.

However, Sinkin has less to say about the means that were put to use in order to attain the transfer of individual allegiance from "primordial groups" to the state-cum-

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[3] Guy P.C. Thomson, "Bulwarks of Patriotic Liberalism: The National Guard, Philharmonic Corps and Patriotic Juntas in Mexico, 1847-88", *Journal of Latin American Studies*, 22, 1990, p.31-68; "Los indios y el servicio militar en el México decimonónico. Leva o ciudadanía?" in Antonio Escobar Ohmstede (coord.), *Indio, nación y comunidad en el México del siglo XIX*. Mexico City, Centro de Estudios Mexicanos y Centroamericanos/Centro de Investigaciones y Estudios Superiores en Antropología Social, 1993, pp.207-251 and Guy P.C. Thomson with David La France, *Patriotism, Politics and Popular Liberalism in Nineteenth-Century Mexico. Juan Francisco Lucas and the Puebla Sierra*, Wilmington, Delaware, Scholarly Resources, 1999.

[4] Alan Knight, "Peasants into Patriots: Thoughts on the Making of the Mexican Nation", *Mexican Studies/Estudios Mexicanos*. 10 (1), 1994, p.148.

[5] Ibid. p.149. Mallon, *Peasant and Nation*..., p.93 and Thomson, "Bulwarks of Patriotic Liberalism...", pp.42-43.

[6] Richard N. Sinkin, *The Mexican Reform, 1855-1876. A Study in Nation-Building*, Austin, Institute of Latin American Studies, University of Texas Press, 1979.

nation, something that the author deems essential for successful nation-building.[7] Indeed, the work says little about the conscious efforts of the liberal governing elite to produce and spread a unifying "idea of Mexico" that would be the focus of the citizens' loyalty. Moreover, be it because Sinkin's work expressly focuses on "political" nation-building, i.e. political modernisation, or because the author deals exclusively with state initiatives, the work fails to address the parallel existence of alternative ideas of the nation as well as the efforts of non-state elites to spread formulations of the Mexican nation that were different from that envisaged by the liberals in power.

By contrast, this dissertation claims, first, that in mid-nineteenth-century Mexico, as indeed in every other polity, there was not one single idea of the nation, but rather a variety of them that can, in the case of Mexico, be roughly grouped into liberal and conservative. Second, that once consolidated in power, the liberal elite made concrete efforts to attain the transfer of individual loyalty to the nation by means of disseminating its idea of the Mexican nation through at least one particular institution; namely public education. Finally, that, despite the consolidation of the liberals in power and their attaining command of the state, alternative ideas of the nation continued to be disseminated through institutions that escaped state control; in the case in question, private schools. The corollary of these three points is that the reproduction of the alternative ideas of the nation through the education system is one of the reasons that accounts for the divide between the official idea of the nation and that of the people.

These claims determine the form and structure of the thesis. Chapter one spells out the theoretical underpinnings of the work. Its central proposition is that while nationalism can be explained as a phenomenon that begins at the elite level, an exclusively elitist approach to nationalism cannot account for the differences between the official and the popular formulations of the nation. It further claims that, in order to overcome this pitfall of elitist approaches, it is necessary to explore the intermediate level of diffusion of the national idea, that is to say, the level of institutions. In a further attempt to present the foundations for the rest of the dissertation, chapter one concludes with an investigation into education and the characteristics that render it a powerful institution for the diffusion of the idea of the nation.

Chapters two and three examine the two main ideas of the nation during the *Reforma* period. As was mentioned above, the conviction that within a given recognised or aspiring national community there exists not one, but, rather, several

[7] Ibid., p.8.

ideas of the nation is a premise on which this thesis rests. In the case of Mexico during the 1855-1876 period this parallel existence is very evident. It is also evident that during that time the diverse formulations were aligned with the division between liberal and conservative that characterised the country's political scene. Therefore, for analytical purposes, a necessary simplification has been made and the different ideas of the nation grouped under the names "conservative" and "liberal". Thus, chapters two and three deal, each, with one of these ideas of the nation and seek to characterise them through the features that distinguished the formulations of the liberal and conservative political elites, who during the *Reforma* were engaged in a struggle for control of the state.

A caveat must be introduced at this point. This dissertation is mainly concerned with the conservative and liberal elites' ideas of the nation during the *Reforma* and their dissemination through education. The thesis does not deal, therefore, with nationalism in general or with Mexican nationalism as such. Nor does it explore in any depth the origins of Mexican nationalism, a topic that has already been thoroughly and insightfully analysed by David Brading.[8] Furthermore, although the *Reforma* provides the general framework for the thesis, the work does not deal with the *Reforma* itself nor does it specifically concentrate on the issue of Church-state relations. Finally, while references to the economic and social background, the political activities and the international relations of the *Reforma* period are made where they are pertinent, none of these topics constitutes, per se, the subject of this thesis.

In turn, what concentrates the attention of this work is the process of dissemination and reproduction of different ideas of the nation through the work of institutions. While there are innumerable institutions through which the idea of the nation can be spread, this work focuses on education. Chapter four specifically explores the role, reach and limits of the education system in disseminating both the liberal and the conservative ideas of the nation after the liberal consolidation in power. Various reasons account for the choice of this particular institution. Firstly, as is discussed in chapter one, education was –and still is—an obvious and conspicuous channel through which the state tried to reach the population and mould the minds of the young through the establishment of a national curriculum that included providing *ad hoc*-tailored civic education, as well as the teaching of "national" geography and the diffusion of a

[8] David Brading, *Los orígenes del nacionalismo mexicano* (2nd ed.), Mexico City, Era, 1988 and *The First America. The Spanish Monarchy, Creole Patriots and the Liberal State 1492-1867*, Cambridge, Cambridge University Press, 1991.

particular interpretation of "national" history. Secondly, although the liberal state emerged strengthened from the war, its power was not consolidated enough to exercise full control of the education system. Private schools continued to exist throughout the Restored Republic that were able to diffuse alternative ideas of the nation. Finally, as a practical matter, the area of education is relatively well-documented for the 1867-1876 period, and provides, therefore a richness of evidence that could not be counted on in the case of other institutions.

What exactly was the content of the idea/s of the nation that found its/their way to the pupils and students through the schools, both private and public? Chapter five tackles this question, by inquiring into the content of the textbooks of the subjects of civic education, national geography and national history that were available in Mexico between 1867 and 1876. In this sense, the chapter follows the steps of Josefina Vázquez's hitherto unrivalled *Nacionalismo y educación en México.*[9] Two aspects, however, differentiate chapter five from Vázquez's work. For one, *Nacionalismo y educación en México* focuses exclusively on national history textbooks. In this work, in turn, not only the books used to teach the history of Mexico, but also those devoted to the teaching of civics (*civismo*) and the "particular geography of Mexico" receive detailed attention. For another, it has been possible to identify and scrutinise in this chapter various national history textbooks that were used during the period that occupies us and that Vázquez failed to include in her otherwise exhaustive study.

Underlying the analysis of textbooks of the three subjects of manifest national content presented in chapter five is the persuasion that these types of books constitute, in fact, a very rich source of information about what is to be considered "legitimate *educational* knowledge, to be actively transmitted in schools".[10] Far from suggesting that all of the analysed textbooks were considered official, in that they had the approval of the country's educational authorities, by regarding such books as embodiments of "legitimate knowledge" I wish to point to the social acceptance of the views propounded in them. Thus, it is my claim, the examination of the books through which the generations of young Mexicans were socialised into the idea of the nation can aid our understanding of widespread social views of the Mexican nation that were being

[9] Josefina Z. Vázquez de Knauth, *Nacionalismo y educación en México* (2nd ed.), Mexico City, El Colegio de México, 1975.
[10] Yoonmi Lee, *Modern Education, Textbooks and the Image of the Nation. Politics of Modernization and Nationalism in Korean Education, 1880-1910*, New York and London, Garland Publishing, 2000, p.12. Emphasis in the original.

transmitted in the classroom and can further provide helpful insights into the diffusion of ideas of the nation that diverged from the official one.

The analysis of the content of the national geography, national history and civics textbooks offered in chapter five completes the picture of the dissemination of the official liberal idea of the nation through the education system, as well as of the reproduction of alternative ideas. Indeed, building on the characterisation of the liberal and conservative ideas of the nation presented in chapters two and three, and taking as a point of reference the findings about the reach and limits of the nationally-oriented curriculum presented in chapter four, the content analysis carried out in the last chapter of this work provides an illustration, at the micro level, of how the "legitimate educational knowledge" embodied in the textbooks coincided, in some cases, and departed, in others, from the idea of the nation that the liberal elite in power sought to spread.

A final, panoramic view of the work is presented in the conclusions. This brief section recapitulates on the main theoretical arguments of the thesis and links them to the findings of the analysis of the educational policy of the liberal state during the *Reforma* period.

Having laid out the structure of the dissertation I would now like to turn briefly to the method and material employed for the elaboration of this work. This thesis has been written from an interdisciplinary perspective. While chapter one strongly relies on the literature of disciplines such as sociology, political science and, to a certain extent, international relations, the other four –empirical—chapters could be more easily inscribed within the framework of historical sociology. As regards the sources consulted, for chapters two to five the copious literature on conservatism and liberalism in Mexico, as well as the less abundant, yet relevant, literature on education in the second half of the nineteenth century has been examined. I believe, however, that it is in the research of archives and primary sources such as newspapers, pamphlets, speeches and original textbooks, on which this work is based, as well as in the qualitative content analysis of these materials, that the contribution of this thesis lies.

Inquiring into the ideas that past generations have held about the nation in whose values the researcher herself has been socialised has not been an easy task. In carrying out this enterprise, the danger of reading the present into the past has been, from the outset, all too great to ignore. Therefore, at every moment I have tried to avoid moulding the interpretation offered in these pages to account monocausally for the

present and to provide therewith a smooth, undifferentiated picture of what actually is an extremely complex and multifarious scene. I am aware, however, that I might not have always succeeded. Nonetheless, it is with the conviction that this work can assist our understanding of the process of change, contest and diffusion of the idea of the Mexican nation that we now take for granted, that I present this dissertation.

CHAPTER 1

BEYOND ELITE APPROACHES TO NATIONALISM: INSTITUTIONS AND THE DISSEMINATION OF THE IDEA OF THE NATION

Much has been written about nations and nationalism, about their birth and transformation, their origins, causes and effects. Yet, within the vast literature on the topic of nationalism, there are relatively few works which occupy themselves with the analysis of institutions and the role they play in the dissemination of the idea of the nation. It is the object of this thesis and, in particular, of this chapter to contribute to the discussion on this relatively unexplored theme. More concretely, the aim here is both to highlight the fundamental role of institutions in the process of transmission of the idea of the nation put forth by nationalist elites and to draw attention to the impact and influence that, through their mediation, institutions have on the reception of the idea of the nation beyond the elite level.

In order to approach this topic on a firm ground, it is necessary, first, to clarify the concepts involved. As an initial step I propose that the term "idea of the nation" should be understood as the ideal conception of a national community or nation. Undoubtedly, the concept "nation" itself poses a significant definitional challenge. In fact, as occurs with all collectivities, defining "nation" demands referring both to the objective and subjective characteristics that provide a sense of commonality to the members of the group one aims to define. Consequently, myriad definitions of the term "nation" have been put forth in the literature; some privileging the objective components of the nation, such as culture, language and religion and others stressing the subjective element of the members' belief in forming a nation.[1] Needless to say, both types of elements are important for the definition of the nation; however, since it is the subjective components that ultimately determine social action, for the purposes of this thesis I have chosen to adopt Ernst Haas' definition of "nation" as a "body of socially mobilised individuals who believe to be united by a set of characteristics which

[1] For definitions, see i.a.: Peter Alter, *Nationalism* (2nd ed.), London, Edward Arnold, 1994 (1st ed. 1989), p.11; Walker Connor, "A Nation Is a Nation, Is a State, Is an Ethnic Group, Is a...", in Walker Connor, *Ethno-Nationalism. The Quest for Understanding*, Princeton, Princeton University Press, 1994, pp.90-117; Ernest Gellner, *Nations and Nationalism*, Ithaca, Cornell University Press, 1983, p.7 and Anthony D. Smith, *National Identity*, Harmondsworth, Penguin, 1991, p.14.

differentiate them (in their own minds) from outsiders and who struggle to create or maintain their own state".[2]

Having thus defined "nation", it is now possible to delve more deeply into the meaning of the term "idea of the nation". Throughout this work the concept "idea of the nation" shall be used to denote the way in which socially mobilised individuals conceive of the specific characteristics that a) render them and other individuals members of the same group; b) differentiate their group from other groups; c) grant their group its uniqueness and d) justify, on the grounds of the group's uniqueness, their aspiration to create or maintain their own state. In this sense, the "idea of the nation" will be approached in this thesis as an intellectual construct, which portrays, defines and depicts the nation, but which is far from the nationalism that translates itself into action on behalf of the nation.

The difference between "nationalism" and "idea of the nation", while not immediately apparent, is, nonetheless, an important one. For the idea of the nation is a component of nationalism. Indeed, whether it is defined as an ideology, a political movement or a set of practices aimed at advancing the interests of a human community deemed by some of its members to be a nation,[3] nationalism always has at its core a conception of the community on whose behalf it is operating. That is to say, it is always inspired by a particular idea of the nation. Yet, while nationalism invariably encloses an idea of the nation, it cannot be reduced to it.[4]

As was mentioned above, this thesis is mainly concerned with elites' ideas of the nation and the process of their diffusion through institutions. In this context, the elites' ideas of the nation are presented in this work somewhat in isolation. However, it is important to draw attention to the fact that these ideas are not created *ex nihilo*. More often than not they draw on what Eric Hobsbawm has called "popular 'proto-national' bonds",[5] that is to say "pre-existing variants of feelings of collective belonging",[6] that

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[2] Ernst B. Haas, "What is Nationalism and Why Should We Study It?" in *International Organization*, 40 (3), 1986, p.726.

[3] For definitions of "nationalism", see i.a. Anthony D. Smith, *Nationalism and Modernism*, London and New York, Routledge, 1998, pp.187-188; Hans Kohn, *The Idea of Nationalism*, London, Macmillan, 1967 (1st ed. 1944), p.19 and Hugh Seton-Watson, *Nations and States. An Enquiry into the Origins of Nations and the Politics of Nationalism*, London, Methusen, 1977, p.3.

[4] Scholarly literature generally deals with nationalism and not with the idea of the nation. Thus, while every effort has been made in this work not to use the terms "nationalism" and "idea of the nation" interchangeably, where the literature discusses nationalism, this thesis does as well in the understanding that the idea of the nation is an essential component of nationalism.

[5] Eric J. Hosbawm, *Nations and Nationalism Since 1870. Programme, Myth, Reality* (2nd ed.), Cambridge, Cambridge University Press, 1993, p.46.

[6] Ibid.

can be based on supra-local forms of popular identification, such as religion-related ones, and/or on "political bonds or vocabularies of select groups, more directly linked to states and institutions, and which are capable of eventual generalisation",[7] such as those linked to kingship and empire. Among these latter, Hobsbawm adds, it is those bonds that can be transformed into the consciousness of belonging or having belonged to a lasting political entity that provide the "strongest proto-national cement".[8] These proto-national bonds are, therefore, the "raw material", of elite –as indeed of all other— ideas of the nation. For it is these bonds that the elites take, transform, make additions to, interpret and attach values to in their formulation of the idea of the nation.

The premise that guides the present work is that even if one admits the dominant view that nationalism is at its outset an elite phenomenon, an approach focusing exclusively on the elites is found to be wanting, as it cannot account for the significant divergences that are frequently evident between the elites' formulation of nationalism and the actual ideas of the nation manifest beyond the elite or official-state level. By contrast, an approach to the study of nationalism that includes in its analysis the institutions that spread the idea of the nation avoids the pitfall of treating the formulation of the dominant elite as the only existing one; provides insights into the ways in which the offer of the idea of the nation is structured and helps to pinpoint the transformations that this idea suffers in the process of its dissemination, thus aiding in the task of accounting for the presence and persistence, among the people at large, of ideas of the nation that might differ from and even contest that of the dominant elite.

The chapter has been structured as follows: the first part deals with elite theories of nationalism and focuses in particular on the trend that portrays nationalism as an instrument of elites in their quest for power. After highlighting the reach and limits of such approaches, the chapter introduces in its second part the notion of institutions as an intermediate level of analysis between the elites and the people and further explores their role in the dissemination of the idea of the nation. Finally, the third part of the chapter concentrates on the institution of public education and explores its relationship to nationalism as well as the characteristics that render it a particularly powerful agent for spreading the idea of the nation.

[7] Ibid. pp.46-47, and 71.

1.1 Nationalism as an elite phenomenon

Invention. Imagination. Modernisation. Uneven development. The rise and spread of nationalism as one of the most potent forces of modern times has been attributed to the work of these and numerous other processes. Yet, while explanations about the surge of nationalism are as varied as the manifestations of the phenomenon itself, a common element appears to run through all the theories that dominate the scholarly debate today: the elites, be they intellectual, political or economic, as the motor of the national idea.[9] Indeed, regardless of the ultimate cause of the appearance of nationalism that the diverse theories identify, they all stress the importance of the role that elites play in the rise, formulation and dissemination of the idea of the nation. Be it by awakening the dormant nation, as nationalists themselves would claim; by "inviting the masses into history" in order to resist the exploitation of imperialism;[10] by imagining the nation as a community that "transforms fatality into continuity";[11] by inventing traditions, which serve as new methods of establishing bonds of loyalty at a time of rapid social transformation;[12] or by either incorporating the middle and lower classes into the dominant ethnic culture as a means to increase state power or by mobilising the people around a vernacular historical culture in reaction to state centralisation,[13] all theories concede, it is the elites upon whom the responsibility of giving the first impulse to the nation ultimately rests.

Indeed, as empirical evidence throughout the world has shown, elites play a prominent role in the emergence and propagation of nationalism. It is precisely the elites who envisage and conceive of the nation as a community to which the supreme loyalty is due; it is they also who define the nature of the national community and the criteria for membership in it. Furthermore, in most cases it is, in fact, the elites who make the first call for mobilisation on behalf of the nation. Not surprisingly, therefore,

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[8] Ibid., p.73.

[9] Following Geraint Parry's definition, throughout this work the term "elite" will be used to denote those "minority groups, each with its inner group of leaders, which attempt to exert some influence, legitimate or otherwise, over the allocation of values in a society." See: Geraint Parry, *Political Elites*, London, George Allen & Unwin, 1969, p.1. For other definitions and the development of the concept since the seventeenth century, see: Tom Bottomore, *Elites and Society* (2nd ed.), London and New York, Routledge, 1993, pp.1-2.

[10] Tom Nairn, *The Break-up of Britain: Crisis and Neo-Nationalism*, London, New Left Books, 1977, p.340.

[11] Benedict Anderson, *Imagined Communities; Reflections on the Origin and Spread of Nationalism*, London and New York, Verso, 1991 (1st ed. 1983), pp.6 and 11.

[12] Eric Hobsbawm, "Introduction: Inventing Traditions" in Eric Hobsbawm and Terence Ranger (eds.), *The Invention of Tradition*, Cambridge, Cambridge University Press, 1983, p.4.

[13] Smith, *National Identity*, pp.54-68.

most scholars of nationalism have devoted significant attention to the analysis of elites and have generated, as a result, theories of nationalism that explain the emergence of nationalism as a historical phenomenon; that pinpoint the social, political and economic conditions under which the elites might resort to nationalism to mobilise the masses; or that typify the diverse manifestations of nationalism; but that scarcely concern themselves with the diffusion, transformation and reception of the elites' formulations of nationalism among the people at large.[14]

To be sure, the limits of elite-centered theories of nationalism have not been completely overlooked in the scholarly literature. Anthony Smith, for one, has criticised elite-centered approaches for not being able to account for the broader social picture of nationalism, or to explain the incidence and intensity of nationalisms, as well as for ignoring "the constraints on elite action and the limits on intellectual 'construction' set by popular ideas and culture".[15] To these shortcomings identified by Smith it could be added that elite-centered approaches fail to address the issue of the reception of the elites' formulations at the popular level, as well as that of the existence of alternative ideas of the nation within one and the same alleged national community. In fact, elite-centered theories tend to present the formulation of nationalism put forward by the dominant elite as if it were the only one on offer and appear to assume a direct and unadulterated transmission of the dominant elite's idea of the nation to the people. In practice, however, there is hardly ever one single conception of a particular nation. More often than not, different elites within the same alleged national community hold diverse –and frequently opposed—ideas of what constitutes the nation, of what its markers and main characteristics are. A brief look at some particular cases might help to illustrate this point.

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[14] See, i.a.: Elie Kedourie, *Nationalism* (4th expanded edition), London, Blackwell, 1998 (1st ed. 1960); Elie Kedourie (ed.), *Nationalism in Asia and Africa*, London, Widenfeld and Nicolson, 1971; Gellner, *Nations and Nationalism* and Hobsbawm and Ranger (eds.), *The Invention of Tradition*. While a general theoretical approach to "popular nationalism" is still to be written, there are some works on case-studies that have significantly advanced the study of this topic. For the Mexican case, see, i.a.: Claudio Lomnitz Adler, *Exits from the Labyrinth. Culture and Ideology in the Mexican National Space*, Berkeley, University of California Press, 1992; Florencia E. Mallon, *Peasant and Nation. The Making of Post-Colonial Mexico and Peru*, Berkeley, Los Angeles, London, University of California Press, 1995 and Guy P. Thomson, "Bulwarks of Patriotic Liberalism: The National Guard, Philharmonic Corps and Patriotic Juntas in Mexico, 1847-88", *Journal of Latin American Studies*, 22, 1990, pp.31-68; as well as his "Los indios y el servicio militar en el México decimonónico. Leva o ciudadanía?" in Antonio Escobar Ohmstede (coord.), *Indio, nación y comunidad en el México del siglo XIX*. Mexico City, Centro de Estudios Mexicanos y Centroamericanos/Centro de Investigaciones y Estudios Superiores en Antropología Social, 1993, pp.207-251.

[15] Smith, *Nationalism and Modernism*, p.190.

In Greece, for instance, at least two distinct ideas of the nation, put forth by different elites, have inspired nationalism. In its initial stage Greek nationalism was animated by a national idea, which, promoted by romantic intellectuals in the diaspora, looked back to the nation's Hellenic past, highlighted its military and intellectual glories and therewith advanced the idea of a secular, democratic Greece "destined to raise Europe to another peak of civilisation".[16] Later, however, in the context of the 1821 war for independence, a different formulation was put forth by the Orthodox politico-religious elites and wealthy merchants within the Ottoman Empire, which advocated the consolidation of the Greek nation based on Greece's Christian-Orthodox identity.[17] While a synthesis of these two trends was attempted with relative success after independence, both ideas continued to exist parallel to each other and to enjoy popular support in the post-independence era.

A second example is that of France, often portrayed as the archetype of a civic nation, based on territory and institutions rather than on any element of common descent. While it is commonly accepted that the emergence of the modern French nation was based on the principle of self-determination, the fact that the new principle itself could be interpreted in two different ways has often been neglected. Yet, as Dominique Schnapper has argued,[18] the self-determination of the French nation could be claimed not only on behalf of the people as citizens, as the civic formulation of the French Revolution patriots demanded, but also in the name of a people defined by an original history and culture –in which the French language and Catholic religion were paramount--, a view embraced wholeheartedly by the traditionalists.[19] That despite the apparent dominance of the civic/revolutionary idea, this dichotomy continued to divide French elites and society well into the late nineteenth century is evidenced by the

[16] John Hutchinson, *The Dynamics of Cultural Nationalism. The Gaelic Revival and the Creation of the Irish Nation-State*, London, Allen & Unwin, 1987, p.27.
[17] For a more detailed treatment, see: Hutchinson, *The Dynamics of Cultural...*, pp.27-28 and Roger Just, "Triumph of the Ethnos", in Elizabeth Tonkin *et al.* (eds.), *History and Ethnicity*, London and New York, Routledge, 1989, pp.71-88.
[18] Dominique Schnapper, "Beyond the Opposition: 'Civic' Nation Versus 'Ethnic' Nation", *ASEN Bulletin*, 12, Autumn-Winter 1996-97, p.6.
[19] For contending ideas of the nation in France, see, i.a.: Douglas Johnson, "The Making of the French Nation", in Mikulas Teich and Roy Porter (eds.), *The National Question in Europe in Historical Context*, Cambridge, Cambridge University Press, 1993, pp.35-62; Douglas Johnson, "The Two Frances: The Historical Debate", *West European Politics*, 1(3), 1978, pp.3-10 and Hans Kohn, *Prelude to Nation-States; The French and German Experiences, 1789-1815*, London, D. Van Nostrand, 1967, pp.43-46.

passionate and heated debates about the meaning of French nationhood that surrounded both the education reform during the Third Republic and the Dreyfus Affair in 1894.[20]

As this necessarily superficial reference to the French and Greek cases shows, different ideas of the nation might be held by different elites inside the same alleged national community. Elite-centered approaches, as has been repeatedly said, fail to address this issue. This is all the more remarkable, since among elite-centered theories there exists a trend of thought which, in the final analysis, would make it possible to explain the surge of alternative and contending ideas of the nation within one and the same nation. With this I refer to the functionalist approaches advanced by John Breuilly and Paul Brass.[21]

In a nutshell, these authors claim that nationalism (and ethnicity in Brass' case) is an instrument that the elites use to advance their own interests. While Breuilly stresses the political aspect of nationalism and circumscribes it to the elites' struggle for control of the state,[22] Brass widens the scope of his approach and includes not only the political interests of the elites, but also the economic ones as motors for nationalism. In this vein, Brass asserts that nationalism is a creation of the elites "who draw upon, distort and sometimes fabricate materials from the cultures of the groups they wish to represent in order to protect their well-being or existence or to gain political and economic advantages for their group as well as for themselves".[23] It is thus, according to these authors, the aspiration to control the state, the need to guarantee their own existence, the desire to obtain economic advantages or a combination of all these that leads the elites to mobilise the masses in support of their own projects by resorting to nationalism.

Now, both Brass and Breuilly agree that, far from being the expression of any "real" characteristics and interests of the nation, the actual content of the nationalistic formulations put forward by the elites is a reflection of the elites' interests and political projects. Even if Brass concedes that in the process of "creation" of the idea of the

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[20] For the education reform, see: Mona Ozouf, *L'Ecole, L'Eglise et la Republique, 1871-1914*, Paris, Editions Cana/Jean Offredo, 1982; for the Dreyfus Affair, see: H.R. Kedward, *The Dreyfus Affair; Catalyst for Tensions in French Society*, London, Longman, 1965.

[21] John Breuilly, *Nationalism and the State*, 2nd ed., Manchester, Manchester University Press, 1993 (1st ed. 1982); Paul Brass, *Ethnicity and Nationalism. Theory and Comparison*, New Delhi, Sage, 1991 and Paul Brass (ed.), *Ethnic Groups and the State*, London and Sydney, Croom Helm, 1985.

[22] Breuilly, *Nationalism and the State*, p.1. In this chapter I focus on Breuilly's emphasis on elite competition. It must be said, however, that Breuilly himself stresses that nationalism should be seen as a form of politics which is connected to the process of modernisation. See: John Breuilly, "Approaches to Nationalism" in Gopal Balakrishnan (ed.). *Mapping the Nation*. London and New York, Verso, 1996, pp.161-163.

[23] Brass, *Ethnicity and Nationalism...*, p.8.

nation the elites are constrained by the beliefs and values of the group they aim to mobilise, he upholds his instrumentalist view by stating that although the repertoire of beliefs and symbols to which the elites can resort might be limited, the elites not only simplify and distort the available beliefs and values, but also select those which they find to be politically useful, rather than those which are central to the belief system of the people in question.[24]

If linking, as Breuilly does, nationalism to the struggle for political power alone would make it possible to envisage different elites within the same supposed nation competing to control the state and proposing, to that effect, different ideas of the nation that reflected their interests, Brass' rather more elaborate approach to the surge of ethnic identity and nationalism would provide an even more solid platform from which to address the issue of contending ideas of the nation within one and the same national community. For Brass not only emphasises that it is the elites, who in pursuit of their interests bring nationalism into being, but also, and more importantly, he takes pains to stress that ethnic identity formation and its transformation into nationalism "is a process created in the dynamics of elite competition within the boundaries determined by political and economic realities".[25] For this author, therefore, elites competing against one another are the *sine qua non* for both the emergence of ethnicity and its transformation into nationalism.

Thus, both Breuilly and Brass provide useful tools to tackle the question of contending ideas of the nation within one and the same nation. By focusing on the instrumental character of nationalism as well as by approaching the phenomenon within the framework of the struggle for control of the state, in Breuilly's case and –perhaps even more to the point— of the process of elite competition, more generally defined, in Brass' formulation, these authors allow for the emergence and existence not only of one, but of various alternative formulations of nationalism –and therewith of ideas of the nation— that reflect both the interests and political projects of the elites that propound them. That despite all these factors none of the authors makes any reference to the issue of contending ideas of the nation is, as was said above, striking.

In turn, what neither Brass' nor Breuilly's theories –as indeed none of the elite-centered approaches—can explain is the presence and persistence of alternative ideas of the nation among the population once and long after one of the competing elites has succeeded in attaining state power. Not only the absence of all reference to a varied

[24] Breuilly, *Nationalism and the State*, p.63 and Brass, *Ethnicity and Nationalism*..., p.16.

offer of ideas of the nation from competing elites contributes to this, but also the lack of interest in the process of diffusion of such ideas. By adopting an uncompromisingly top-down approach, elite-centered theories seem to assume a direct and pristine transmission of the idea of the nation from the ruling elite to the people. Needless to say, in the real world this is hardly ever the case. Much on the contrary, the spread of the idea of the nation is never direct, but rather always mediated by institutions. It is, indeed, through diverse institutions that the people are socialised into the values and meaning of the nation and that individuals are ultimately formed into members of the national community. It is also institutions that connect the ruling elites to the popular bases they aim to mobilise with their nationalistic formulations. It is finally through the institutions that the ruling elite, willingly or not, fails to control, that alternative elites can and do diffuse their own ideas of the nation among the people at large.

It is important to stress that this work does not claim that institutions and the role they play in the dissemination of the idea of the nation are the sole variable that can explain the discrepancies between "elite" and "popular" formulations of the nation. Undoubtedly these differences are also the product of numerous other factors that deserve separate treatment.[26] The contention here is, rather, that while the shape that "popular" ideas of the nation assume is influenced by a broad set of variables, institutions and the way they disseminate the idea of the nation are of such significance that an analysis of this aspect alone can provide important evidence of the reach, limits and discontinuities in the reproduction of the state-elite idea of the nation, as well as of the diffusion of alternative formulations through institutional channels. In consequence, looking at institutions can offer valuable insights into the elements upon which the popular idea of the nation is formed. Exploring what makes of institutions such a pivotal element in the reproduction of the idea of the nation and in the existence and persistence of contending ideas of the nation beyond the elite level is the purpose of the following pages.

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[25] Brass, *Ethnicity and Nationalism*..., p.16.

[26] For a view that stresses the ethnic identity of the people in question as an important prerequisite of the successful "popular" acceptance of the elite's formulation of nationalism, see: Anthony D. Smith, *The Ethnic Origins of Nations*, Oxford, Blackwell, 1986.

1.2 Institutions: the link between the elites and the people

In 1936, the sociologist E.C. Hughes stated that "the only idea common to all usages of the term 'institution' [was] that of some sort of establishment of relative permanence of a distinctly social sort".[27] Hughes' veiled complaint encompassed in this definition was certainly warranted; for in the thirties, as much as in the present, the term "institution" was employed to denote quite different things. Nonetheless, although the usages of the term continue to be diverse, today there seems to be agreement in the literature that the concept "institution" refers to two basic phenomena. For one, "institution" might be used to denote "a general pattern or categorisation of activity". For another, the term might refer to "a particular human-constructed arrangement, formally or informally organised".[28] To be sure, both ways to conceive of institutions entail the establishment of relative permanence of a distinctly social sort to which Hughes alluded. However, this is not the only characteristic that the two notions have in common; more importantly, both general patterns of activity and particular arrangements involve the existence of a persistent set of rules –be they formal or informal—that prescribe behavioural roles, constrain activity and shape expectations.[29]

Institutions, then, orient people's expectations and regulate their activity and behaviour. They do so because the goals they pursue are "generally recognised as important in a society".[30] It is therefore social values –those values which establish what is important for a society, at any rate—that ultimately constitute the soul of institutions. In this sense, institutions are not only "frozen decisions" or "history encoded into rules", as J. March and J. Olson maintain,[31] but also, and more significantly, crystallised values.

The fact that institutions embody the prevalent values of a society does not mean, however, that institutions are unchangeable. On the contrary, like all social life,

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[27] E.C. Hughes, "The Ecological Aspect if Institutions", *American Sociological Review*, 1, 1936, p.180; quoted in Robert O. Keohane, "International Institutions: Two Approaches", in Friedrich Kratochwil and Edward D. Mansfield, *International Organization: A Reader*, New York, HarperCollins, 1994, p.47.

[28] This and the previous quote are from Keohane, ibid. Instances of institutions as general patterns of activity would include marriage, international cooperation and the nation; institutions as particular human-constructed arrangements would include, instead, the World Bank, the French Constitution and the Mexican public education system.

[29] Ibid., p.48.

[30] Allan G. Johnson, *The Blackwell Dictionary of Sociology*, Cambridge, Blackwell, 1995, p.142.

institutions are experienced as external to the individuals who participate in them; yet, they are also inescapably changed and shaped by that participation.[32] At this point it is necessary to make a distinction between institutions conceived as categorisation of activity (general institutions) and institutions as particular arrangements (particular institutions), for the differences between both are mostly related to the issue of change and, although subtle, are significant. Indeed, while "general" institutions incarnate fundamental social values, they also mirror long-established social practices. Insofar as "general" institutions change as a result of individuals' participation in them, they do so only gradually. Thence, "general" institutions do not only look after the reproduction and continuity of fundamental social values and established practices, but also provide an arena in which the compromise arising from the interaction between old and new values and old and new practices can be stabilised –if on most occasions, only temporarily. By contrast, rather than reflecting long-accepted practices, "particular" institutions seek to establish, regulate and reproduce such specific practices. Being *ad hoc* human-constructed arrangements, this type of institution is more prone to being immediately affected by human interaction, as well as by sudden changes in the dominant social values. Moreover, and especially relevant for the purposes of this work, despite always being justified in terms of fundamental social values, "particular" institutions are quite often instruments for the diffusion of new social values.

In this dissertation it is these "particular" institutions and their function as transmitters of social values that receive attention.[33] In this sense, the present work shares some of its main concerns with the literature on nation-building, represented by the works of Karl Deutsch, William Foltz, David Apter, Daniel Lerner and Reinhard Bendix.[34] These authors basically claim that nations are human constructions which arise out of a process of intense institutionalisation. In their view, far from being primordial communities, nations, "like houses", can be built "according to different plans, from various materials, rapidly or gradually, by different sequences of steps, and

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[31] J. March and J. Olson, "The New Institutionalism: Organizational Factors in Political Life", *American Political Science Review*, 79, 1984, p.741.

[32] Johnson, *The Blackwell Dictionary...*, p.142.

[33] For an alternative approach that presents the nation as a "general" institution, characterising it as a "practical category, institutionalised form and contingent event", see: Rogers Brubaker, *Nationalism Reframed. Nationhood and the National Question in the New Europe,* Cambridge, Cambridge University Press, 1996. The quote is from page 7.

[34] Karl W. Deutsch and William J. Foltz (eds.), *Nation-Building*, New York, Atherton Press, 1963; David Apter, "Political Religion in the New Nations", in Clifford Geertz (ed.), *Old Societies and New States*, New York, Free Press, 1963; Daniel Lerner, *The Passing of Traditional Society*, New York, Free Press, 1958 and Reinhard Bendix, *Nation-Building and Citizenship* (enlarged ed.), New Brunswick, Transaction Publishers, 1996 (1st ed. 1964).

in partial independence from [their] environment".[35] Writing with the process of decolonisation in Asia and Africa as backdrop and particularly interested in the emergence of new states in the former colonies and the concurrent efforts of the newly independent state's elites to create unified polities out of the heterogeneous societies for whose government they became responsible, these authors argued that nations were creations of the elites which were aimed at fulfilling two specific functions: on the one hand, that of unifying the –often deeply—divided societies of the new states and, on the other hand, that of providing an impulse to mobilise the population for the commitment and self-sacrifice entailed in the process of modernisation, which came hand in hand with the attainment of independence.[36]

While the main point of reference for the nation-building literature was the experience of post-colonial Asia and Africa, the approach was also cogently applied to account for the emergence of "old" European nations. Consistent with the general argument, these nations were portrayed as creations of the elites of the modern centralising states in an effort to provide a unifying ideology to legitimate both the socially costly modernisation policies of the state and its centralising drives. Encompassing "new" and "old" nations alike, the term "nation-building" was thus coined to refer to this process of deliberate creation, and more concretely to denote "a manner of building group cohesion and group loyalty for international representation and domestic planning".[37]

How specifically these group cohesion and loyalty were to be attained is a question for which every author offered a different answer. In fact, within the literature on nation-building there are significant differences with regard to the specific means that are considered essential for the construction of nations –the rise of a powerful national ideology or "political religion",[38] the establishment of a widespread and effective network of social communication,[39] or the creation of adequate mechanisms of popular political participation,[40] to name but a few. In the final analysis, however, all these means relate to the creation of institutions that are meant to foster the people's allegiance to the nation, instil both a sense of commonality among the members of the

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[35] Karl W. Deutsch, "Nation-Building and National Development: Some Issues for Political Research" in Deutsch and Foltz, *Nation-Building*, p.3.
[36] Smith, *Nationalism and Modernism*, p.20.
[37] Carl Friedrich, quoted by Karl Deutsch in Deutsch and Foltz, *Nation-Building*, p.10.
[38] Apter, "Political religion..."
[39] Karl W. Deutsch, *Nationalism and Social Communication*, 2nd ed., New York, MIT Press, 1966, (1st ed. 1953).
[40] Bendix, *Nation-Building and Citizenship*...

national community and a sense of difference *vis-à-vis* other nations, as well as to promote the uniformity of the members of the nation. In this vein, the production of national rituals through civic ceremonies and entities as varied as parliaments, armies, popular literature, courts, constitutions and schools acquire significance as nation-building institutions.[41]

Thus, from the viewpoint of the nation-building approach the creation of adequate and effective institutions that integrate the population and aid in its mobilisation in support of the political projects of the nationalist elite is fundamental for the success of the nation-building efforts. This premise is, I believe, indisputable. What the nation-building approach tends to overlook, however, is the fact that institutions are quite frequently not only the product, but rather part and parcel of the political struggle. By assuming absolute and direct control of the institutions by the state elites, as it tends to do, the nation-building approach reduces the explanatory power of its tenets.

The fact is that because of their crucial functions of prescribing roles, constraining activity, shaping expectations and, most saliently, of ensuring the continuity and the reproduction of fundamental social values, particular institutions –or more specifically, command over them—are an essential instrument in the struggle for, as well as in the consolidation of power. Hence, it is seldom the case that one single elite has command over all the relevant institutions. Rather what usually takes place is a contest for control of the institutions by contending elites and, not infrequently, even by different factions within one elite. To be sure, in most cases the battle for control over institutions assumes the form of a struggle for control of the state. As Samuel Baily has argued, control over the state gives the group who holds it "distinct advantages over its competitors", among which are "money, police and military support [and] direct access to the communications media [...]".[42] In other words, dominion over the state's institutional infrastructure provides the group in power with the material resources necessary for its survival. Even more importantly, state power affords the elite in question enormous symbolic resources, as it is usually the state that controls the principal institutions of social mediation and, therewith, the most powerful instruments for the establishment and reproduction of values, such as those embodied in the idea of the nation.

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[41] Breuilly states that these institutions "construct, preserve and transmit national identities and [...] connect those identities to interests." See his "Approaches to Nationalism...", p.154.

[42] Samuel L. Baily (ed.), *Nationalism in Latin America*, New York, Alfred Knopf, 1971, p.7.

However, while control of the state and the concurrent command over its institutions is the surest and most efficient means by which an elite can disseminate its own idea of the nation and shape accordingly the goals and interests it claims to pursue on behalf of the national community, possession of state power does not always guarantee the ruling elite total control over all the relevant institutions. For, as Michael Mann has argued, state power is far from absolute –even in totalitarian states—and the autonomy of the state is much more limited than we tend to think. In this context, Mann's distinction between the "despotic power" of the state and its "infrastructural power" is illuminating.[43]

Mann claims that there are, in fact, two conceptions of state strength. On the one hand, there is the "despotic power", which refers to "the distributive power of state elites over civil society".[44] This type of power derives, according to Mann, from the range of actions that state elites can undertake without routine negotiation with civil society groups. On the other hand, there is the "infrastructural power", defined as "the institutional capacity of a central state, despotic or not, to penetrate its territories and logistically implement decisions".[45] This is, by contrast, "power through" society, which coordinates social life through state infrastructures. In Mann's view, therefore, control of the state and the ability to exercise despotic power, in whatever measure, do not necessarily guarantee the state's social or territorial penetration. Furthermore, Mann takes pains to stress that the institutions that compose the state "undertake different functions for different interest groups located within [the state's] territories" and, thus, parts of the body politic of the state are "open to penetration by diverse power networks".[46]

The above discussion should suffice to convey a view of the state as a porous entity with far from absolute powers. This understanding of the state is relevant to this chapter insofar as it shows that control of the state does not automatically give the state elite command over all state institutions, and that even those institutions that are placed under the aegis of the state can be influenced by society. In terms of the diffusion of the idea of the nation, this has important implications. First, it means that the state does not always control all the institutions through which the idea of the nation is spread.

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[43] Michael Mann, *The Sources of Social Power. Volume II: The Rise of Classes and Nation-States, 1760-1914*, Cambridge, Cambridge University Press, 1993, pp.59ff. I thank John Hutchinson for drawing my attention to this distinction.
[44] Ibid, p.59.
[45] Ibid. p.59.
[46] Ibid. This and the previous quote are from p.56.

Secondly, it suggests that the idea of the nation disseminated through state-controlled institutions is itself subject to modification through the penetration of the non-state elites –"power networks", to use Mann's term—that permeate such institutions. How this is actually done is, in the final analysis, an empirical question. Here it is enough to stress that it is through those institutions which are not controlled by the state that parallel –and often opposed—ideas of the nation are transmitted to the members of the supposed national community; and that it is also through such institutions that ideas of the nation which represent an alternative to that propounded by the state-elite can continue to exist and be reproduced over time.

This dissertation is concerned with one of those institutions, which despite being apparently under control of the state, provided alternative elites with a platform from which to disseminate their own idea of the nation. In the case that constitutes the subject of this work, i.e. Mexico during the *Reforma* period, public education was, indeed, both an instrument of the state and a tool of non-state elites to spread their contending ideas of the nation. It is the aim of the following section to explore what renders education as an institution such a potent resource for spreading the idea of the nation and, consequently, why it is that command over it is so desirable in the eyes of rival elites.

1.3 Education and the transmission of the idea of the nation

Institutionalising the nation entails both using the existing institutions and giving birth to new ones in order to transmit and reproduce the idea of the nation among the population at large. It is a process that implies, to borrow George Mosse's phrase, a concerted effort to "nationalise the masses";[47] that is to say to render the population aware of the nation and make it share in its goals and values. Needless to say, the repertoire of means available to the state to disseminate the idea of the nation is, as a rule, broad. For instance, the state might resort to organising public ritual and public celebrations that, as such, not only "provide visual and aural dramas of the society's hierarchy"; but that also reiterate "the moral values on which the [elites'] authority

[47] George Mosse, *The Nationalization of the Masses: Political Symbolism and Mass Movements in Germany*, New York, Howard Fertig, 1975.

rests",[48] values of which the idea of the nation is an accomplished embodiment. Or, as has been thoroughly documented by Eugene Weber for the case of France,[49] the state might deliberately resort to institutions like the army and conscription to break down local attachments and thereby facilitate the exposure of the rural population to the values of the nation as envisaged by the elites.

Yet, from the institutions at disposal of the state elite in its quest to spread the idea of the nation, education is the most significant one. Not casually was the power of education in serving the interests of the state and its elite noticed as early as 1805 by Napoleon when he wrote: "There will never be a fixed political state of things until we have a body of teachers instructed on established principles. So long as the people are not taught from their earliest years whether they ought to be republicans or royalists, Christians or infidels, the state cannot properly be called a nation."[50]

Behind this faith in the potential of education lay, no doubt, a conception of the human being that was strongly influenced by the philosophy of the Enlightenment. The idea that individuals were the product of their environment as well as John Locke's depiction of the human consciousness as a *tabula rasa*, upon which anything could be imprinted,[51] animated the confidence in education's capacity to shape and mould the citizens in a way that they would adopt and work towards the attainment of the goals of the state –and, by extension, of its elite.

However, if the Enlightenment and the change in the conception of the human consciousness stimulated the development of education, it was the conditions imposed by modernity that made education necessary. In fact, full participation in modern society requires an amount of knowledge that is so great and diverse, that it can no longer be provided by simpler, less formal modes of socialisation, such as those that take place within the family, the guild or the religious community. In this context, education thus emerges as a complex and formal way of socialisation, whereby every new member is given the systematic training that enables him/her to partake in the modern society.[52]

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[48] William H. Beezley, Martin English and William E. French, "Introduction: Constructing Consent. Inciting Conflict", in William H. Beezley *et al.*, *Rituals of Rule, Rituals of Resistance. Public Celebrations and Popular Culture in Mexico*, Wilmington, Delaware, SR Books, 1994, p.xiii.

[49] Eugene Weber, *Peasants into Frenchmen: The Modernization of Rural France, 1870-1914*, London, Chatto and Windus, 1979.

[50] Quoted in Kedourie, *Nationalism*, p.77.

[51] Andy Green, *Education and State Formation. The Rise of Education Systems in England, France and the USA*, New York, San Martin's Press, 1990, p.30.

[52] See Johnson, *The Blackwell Dictionary*...,p.92.

Equipping new members for effective participation in modern society entails, however, more than supplying them with the necessary skills to join in modern economic life. As Emile Durkheim stressed, in the context of the fragmentation and individualism that characterise modern society, it is necessary to create new forms of social integration that enable the emergence of social solidarity among the otherwise isolated members of society. Education fulfills this function by transmitting a collective culture that provides the individual members with the community of ideas and sentiments upon which social solidarity can be built.[53]

The relationship between the transmission of collective culture and the nation cannot be sufficiently stressed. It is so strong that it has been made the focus of one of the most influential theoretical accounts of the emergence of nations and nationalism; namely, that propounded by Ernest Gellner in his works *Thought and Change* and *Nations and Nationalism*.[54] In view of the significance of Gellner's theory and of the emphasis it places on the importance of the transmission of a standardised common culture through formal education systems for the surge of nations, an overview of its main arguments is justified.

Gellner's starting point is a concern with the impact of modernisation and its uneven diffusion on traditional communities. For the author, the advent of modern industrial society brought about two fundamental changes. Firstly, communication became crucial. Yet, it was a very specific type of communication which acquired preeminence; namely a communication whose emphasis was not in the context, but on the message itself. According to Gellner, in traditional societies highly developed structure ascribes roles, "which determine and circumscribe [individuals'] activities and relationship to others",[55] thus making effective communication possible even if the culture of the interacting individuals is different. By contrast, modern industrial societies are much less structured; they are characterised by great mobility, scarce relationships and ephemeral and non-repetitive interactions. Under these circumstances, which render communication essential, the burden of comprehension shifts from the context to communication itself.[56] Furthermore, in modern society culture acquires new relevance; for if the message at the core of the communication process is to be understood by all members engaged in the casual contacts that as a rule take place in

[53] See the full discussion on Durkheim in Green, *Education and State Formation...*, pp.34-36.
[54] Ernest Gellner, "Nationalism" in *Thought and Change*, London, Weidenfeld and Nicholson, 1964; and *Nations and Nationalism*, Oxford, Blackwell, 1983. The quotes that follow are from the 1993 edition.
[55] Gellner, *Thought and Change*, p.166.
[56] Ibid., p.155.

this kind of society, it must be formulated in a common culture –which Gellner equates with language--, accessible and intelligible to all.

Secondly, Gellner claims, the arrival of modern society brought with it the requirement that all of society's members be literate and numerate if they were to participate fully in economic and political life. The reason for this is twofold: for one thing, the high degree of specialised labour and the standardisation of work, hallmark of industrial society, require that individuals be mobile, mutually substitutable and, by consequence, able to communicate with "[...] a large number of other men, with whom they frequently had no previous association and with whom communication must consequently be explicit, rather than relying on context".[57] This means, according to Gellner, that this communication must be in the same shared and standardised linguistic medium and script. It is thus that universal literacy becomes central, because only it can guarantee that all members of society share this standardised linguistic medium and script. For another thing, only a person who can read, write and who has a "certain level of technological competence" can be an effective moral member of a modern community, as "only a person possessing these can really claim and exercise his rights".[58] Thus, in Gellner's view, citizenship in the industrial era becomes a matter of culture.

These characteristics of modern society bring education to the foreground. For if all members of society are to be provided with the literacy and numeracy that will allow them to claim their rights and exercise their duties as citizens as well as to efficiently participate in economic life, a new kind of schooling, one that is mass-oriented, public and standardised becomes indispensable.[59] Clearly, only the state has both the resources and the strength to sustain such education systems, therefore, education becomes also a state enterprise. That this kind of education represents an important break with traditional forms of socialisation can hardly be doubted. As Smith has observed,

> [u]nlike the minimal contextual education [...] given to children in pre-modern societies, usually by the family and the village school, education in a modern society is a public affair and of far greater importance to the operation of society. Public mass education systems or "exo-socialisation"

[57] Gellner, *Nations and Nationalism*, p.35.
[58] Gellner, *Though and Change*, p.159.
[59] Gellner, *Nations and Nationalism*, p.35.

> provide a vigorous training in the uses of precise, explicit messages and context-free meaning in a standardised written language and script.[60]

The implications of the introduction of such education systems are, for Gellner, of utmost importance. In his view, not only does education now determine the employability, dignity, security and self-respect of individuals, but also confers identity on them, as "the limits of the culture within which [individuals] were educated are also the limits of world within which they can morally and professionally breathe".[61] More importantly, perhaps, by generally imposing on society a "high" culture based on a "school-mediated, academy supervised idiom, codified for the requirements of reasonably precise bureaucratic and technological communication",[62] modern education systems create nationalism and promote the emergence of artificial cultural communities, which, for Gellner, are nothing else but nations.

Gellner's arguments are, no doubt, compelling. Yet, they overstate the role of state-sponsored public education systems in creating nationalism. For, while it can be convincingly argued that modern education systems have been conducive to the emergence of modern nations, it is difficult to prove that nationalism too is a product of mass public education. Rather, the opposite seems to be the case: it is not the education system that creates nationalism, but nationalism that gives rise to state-sponsored mass public education.

Indeed, a historical survey of the first public education systems in Europe carried out by Francisco Ramírez and John Boli[63] demonstrates that European states –where state-sponsored mass public education first saw the light—became engaged in authorising, funding and managing mass schooling as part of an endeavour to "construct a unified national polity[,] within [which] individuals were expected to find their primary identification with the nation".[64] Moreover, according to Andy Green's persuasive study of the emergence of education systems in England, France and the

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[60] Smith, *Nationalism and Modernism*, p.31. On a similar note, Green has pointed out that "[...]national education systems [are] not simply elaborated networks of schools of the earlier type: they [are] qualitatively distinct. What characterise[s] the national education system [is] its "universality" and specific orientation towards the secular needs of the state and civil society." Green, *Education and State Formation*, p.29.

[61] Gellner, *Nations and Nationalism,* p.36.

[62] Ibid., p.57.

[63] Francisco O. Ramírez and John Boli, "The Political Construction of Mass Schooling: European Origins and Worldwide Institutionalization", *Sociology of Education*, 60, 1987, p.2-17.

[64] Ibid., p.3. See also: Yasemin Nuhoglu Soysal and David Strang, "Construction of the First Mass Education Systems in Nineteenth-Century Europe", *Sociology of Education*, 62, 1989, p.279.

United States,[65] the nineteenth-century European education system surged at a time when nationalism was on the rise. In Green's view, this explains why the state-sponsored, mass public education system in Europe came to assume a primary responsibility for the moral, cultural and political development of the nation; why

> [i]t became the secular church [...], variously called upon to assimilate immigrant cultures, to promote established religious doctrines, to spread the standard form of the appointed national language, to forge a national identity and a national culture, to generalise new habits of routine and rational calculation, to encourage patriotic values [and] to inculcate moral disciplines.[66]

Public education systems were thus founded to spread the idea of the nation. But this was not the sole function these institutions had to fulfill. Behind the educational efforts of European ruling elites there was also a strong aspiration to enhance state power and therewith these elites' social preeminence. Arguing on this point, Green has drawn attention to the fact that the main impetus for the creation and expansion of education systems in Europe was the need to provide "trained administrators, engineers and military personnel; to spread dominant national cultures and inculcate national ideologies of nationhood; and so to forge the political and cultural unity of burgeoning nation-states and cement the ideological hegemony of their dominant classes".[67] It was, therefore, the interest in providing not only basic skills to partake in modern economic life, but also an ideology aimed at both unifying the population and legitimating the rule of those in power within a context of nascent nation-states which, in Green's view, stimulated the emergence of mass public education systems in Europe.

The issue of the environment of "burgeoning nation-states" should, in view of its importance, be explored further. Yehudi Cohen has claimed that the emergence of state-sponsored mass schooling systems is only possible in the context of a civilisational network of nation-states competing with one another.[68] Ramírez and Boli's above mentioned study proves, in fact, that the process of construction of education systems in Europe was fuelled by inter-state competition. It further shows that this process intensified in states experiencing military threats or defeat, in the face

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[65] Green, *Education and State Formation.*
[66] Ibid., p.80.
[67] Ibid., p.309.
[68] Yehudi Cohen, "The State System, Schooling and Cognitive and Motivational Patterns" in Nobuo Shimahara and Adam Scrupski (eds.), *Social Forces and Schooling*, New York, McKay, 1979, pp.103-140.

of failure to keep pace with industrial development in antagonistic countries or in cases where "a nation moving toward a position of first rank in the [interstate] system was challenged by rivals attempting to block its rise".[69] In states faced with these challenges, education appeared as an unrivalled instrument to achieve a more comprehensive mobilisation of the population in support of the ruling elite's projects or, as a means of national revitalisation and reconstruction, which would "not only [...] repair the ruins of war, but [would] also [...] establish a new social order".[70]

State funded, mass public education became, thus, a feature of the incipient European nation-state. As this form of political organisation became the rule and evolved into the Western and, ultimately, world-model to be followed, every entity aspiring to the status of nation-state espoused, almost automatically, the conviction of the need to count on a system of mass public education for the success of its nation-building efforts.[71] Lamenting the "hijacking" –as it were—of education by nationalism, Elie Kedourie stated:

> [...] On nationalist theory, education must have a central position in the role of the state. The purpose of education is not to transmit knowledge, traditional wisdom and the ways devised by society for attending to the common concerns; its purpose rather is wholly political, to bend the will of the young to the will of the nation. Schools are instruments of state policy, like the army, the police and the exchequer.[72]

Undoubtedly Kedourie was right in pointing out that schools were, as they still are, instruments of state policy. What seems to have escaped Kedourie's otherwise incisive eyes is that education, as we now know it today, was not suddenly overtaken by nationalism, but was, more accurately, created by it. The state-sponsored mass public education system emerged in Europe as a means to strengthen the state and to consolidate it around a national form. Education was therefore born bound to the idea of the nation and was aimed, since its earliest origins, at diffusing it. Here lies the key

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[69] Ramírez and Boli, "The Political Construction of Mass Schooling...", p.3.

[70] Green, *Education and State Formation*, p.310. It is worth mentioning that the state-led educational efforts did not always meet with the desired results. As Michael Mann has shown for the case of Prussia in 1848, the education system provided an arena from which the *Bildungsbeamten* and teachers could articulate their opposition to the *Kaiserreich* and press for reform from within the system. See: Mann, *The Sources of Social Power...*, ch.9.

[71] John W. Meyer, Francisco O. Ramírez and Yasemin Nuhoglu Soysal, "World Expansion of Mass Education, 1870-1980", *Sociology of Education*, 65, 1992, p.131.

[72] Kedourie, *Nationalism*, p.78.

to explaining why education is such a prominent tool in the state's consolidation efforts and why control over this institution gives an enormous advantage to the elite in power.

Yet, what happens when the state cannot exercise full control over the whole educational establishment? Gellner argued that the educational infrastructure required to make of every individual a literate and replaceable citizen is too large and costly for any organisation other than the state.[73] Quite often, however, the costs of sustaining education and the efforts necessary to build and staff schools are too large even for the state itself.[74] Under these circumstances, society tends to fill in the gaps. Headed by elites who oppose the state's centralising efforts and whose preeminence is threatened by the idea of the nation advanced by the state, alternative establishments of instruction might be erected and be used as a platform to spread different values and different ideas of the nation. The interesting point here is that these elites resort to the same type of institution that the state employs, i.e. formal education. It would appear that, once the system of public education became the main instrument for socialisation, there was no way back. The nation was and still is to be taught, principally, in the classrooms.

1.4 Final considerations

The argument presented in the previous pages can be summarised as follows: Elites play a prominent role in the surge of the idea of the nation; it is they who initially conceive the national community and define its difference and uniqueness *vis-à-vis* other groups. Researching nationalism by focusing exclusively on the elites can therefore throw light on the process of birth of the idea of the nation as well as on the first steps that lead to nationalist mass mobilisation. Nonetheless, an unconditional elitist analysis cannot account for the reception of the idea of the nation at the popular level and for the later reproduction of this idea.

In this chapter I have put forth the study of institutions as an intermediate level of analysis between the elites and the popular level. I have suggested that although institutions themselves are creations of the elites, their mediating function brings them, figuratively speaking, one step closer to the people, thus rendering them a rich source

[73] Gellner, *Nations and Nationalism*, p.37.
[74] Soysal and Strang's survey of the first education systems in Europe mentions, for instance, Greece, Italy, Portugal and Spain as weak states in which the educational efforts of the state were rhetorical rather than effective. Soysal and Strang, "Construction of the First...", pp.286-287.

of information about the origins of the transformations that the elite's idea of the nation might suffer in the process of its diffusion. To be sure, while the role of institutions does not suffice to explain the often observable differences between elite and popular ideas of the nation, a better understanding of institutions' function in disseminating the elite's idea can shed light on some aspects of the process whereby this idea is re-elaborated and re-interpreted from below.

In the context of this approach, public education received particular attention. Being born as a product of state elites' efforts to consolidate their power by strengthening the state and solidifying it around a national form, the modern system of mass public education was tied, from its birth, to the function of spreading the idea of the nation. Elites who are able to control education have thence at their disposal one of the most potent agents of modern socialisation through which they can spread their idea of the nation and therewith attempt to legitimate their actual or desired predominance. This is what renders command over education so attractive and what explains the often aggressive competition of elites for control over this institution.

While the system of modern public education originated as an enterprise of the modern centralising state, absolute control of the state over the education system was and is, as with other institutions, not automatically guaranteed. In the case of debilitated states, moreover, the gaps left by the state offer competing elites invaluable opportunities to secure pockets of power from which they can further their interests and projects and legitimate them through their idea of the nation. This is what in many senses happened in Mexico during the *Reforma* period. It is the object of the following chapters of this thesis to presents the idea of the nation of the two most prominent elites engaged in the struggle for control of the state during the 1855-1867 period and to explore how, after the military victory of one of them, education served as a channel to transmit not only the official idea of the nation formulated by the liberal state elite, but also other ideas that echoed that of its conservative opponent.

CHAPTER 2

GOD, KING AND THE MEXICAN *PATRIA*: THE CONSERVATIVE IDEA OF THE NATION

This chapter investigates the conservative idea of the nation, the first of the two conceptions of Mexico which fed the violent conflict that convulsed the country between 1855 and 1867. This idea took definite shape and acquired influence in the late 1840s –that is, nearly a decade before the *Reforma* liberals' conception of the nation came into being.

In this chapter I argue that the conservative idea of the Mexican nation was an ethnic one. In thus characterising the conservative formulation I am drawing from the distinction between ethnic and civic nations advanced by Anthony Smith.[1] Since Smith's typology provides the basis for the analysis presented in the following pages, as well as in chapter three, I would like to explore very briefly its main features.

In a nutshell, Smith claims that there exist two clearly distinguishable conceptions of the nation. On the one hand, there is the ethnic model, which portrays the nation as a community of descent. This type of nation stresses birth and genealogy over territory, envisages the nation as a "fictive super-family"[2] and is epitomised by the German nation. On the other hand, there is the civic model of the nation, which rests on a conception of a well-defined territory on which the *patria*, a community of laws and institutions with a single political will, exists.[3] The civic conception of the nation, of which revolutionary France is the archetype, further stresses legal equality among the members of the community and the centrality of a shared common public culture.[4] Needless to say, most nations combine elements of both ideal types; yet the fact that, in practice, elements of one or the other tend to dominate in every specific case renders this analytical distinction useful.

For, as I argue here, the conservatives saw Mexico as a community of descent. As will be discussed in detail in the second part of this chapter, the idea of the nation that the conservatives held and defended was specifically articulated around pride in the

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[1] Anthony Smith, *National Identity*, Harmondsworth, Penguin, 1991, pp.9-13 and "Civic and ethnic nationalism revisited: analysis and ideology", *ASEN Bulletin*, 12, Autumn-Winter 1996-97, pp.9-11.
[2] Smith, *National Identity*, p.12.
[3] Ibid., p.10.

Spanish origins of Mexico and in the cultural, religious and, to some extent, racial dimensions thereof.

The chapter has been structured as follows: after presenting a brief overview of the *Reforma* period, intended to provide the basic historical framework for the discussion developed in the rest of this dissertation, the chapter looks at Mexican conservatism and touches upon its main features, programme and creed. Following this general characterisation, the chapter focuses on the conservative idea of the nation and examines its main elements. In this discussion, the pride in the Spanish origins of Mexico as well as Catholicism as a fundamental element of the Mexican nation receive particular attention. The final pages of the chapter present some concluding remarks.

2.1 The Mexican *Reforma* (1855-1867): An overview

The leadership of what came to be known as the *Reforma* seized power in 1855, in the aftermath of the Ayutla revolution. In its origins a revolt located within the tradition of local chieftains' hostility towards the central power, the movement of Ayutla aimed to overthrow Antonio López de Santa Anna's dictatorial regime and return Mexico to a loose confederation of states in which local caciques could rule freely and unobstructed by national policies.[5] Soon, however, the movement attracted the attention of prominent liberals who had been exiled by Santa Anna, and became the vehicle for their return to public life. As liberal intellectuals and politicians joined, the direction of the movement changed in a significant way, as the initial goal of defending "republican" institutions declared in the Plan of Ayutla on 1 March 1854 gave way, ten days later, to the goal of defending "liberal" institutions.[6]

Having succeeded in ousting Santa Anna, the liberals, under the military leadership of Juan Álvarez, took power in August 1855. After a short period as president, Álvarez resigned his office in favour of Ignacio Comonfort, a moderate liberal who immediately appointed a cabinet in which liberals of radical views were in a clear majority. As will be seen in chapter three, while moderate and radical liberals

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[4] Ibid., p.11.
[5] Brian Hamnett, *Juárez*, London, Longman, 1994, p.57; Richard N. Sinkin, *The Mexican Reform, 1855-1876. A Study in Nation-Building*, Austin, Institute of Latin American Studies, University of Texas Press, 1979, pp.3 and 35.
[6] *Plan de Ayutla*, 1 March, 1854, in Ernesto de la Torre Villar [*et al.*], *Historia Documental de México*, Mexico City, UNAM, 1964, vol.2, p. 263.

differed on their views about the pace at which changes in Mexican society should take place, they did agree that changes were necessary to solve what, in their shared view, was Mexico's main problem: namely, the detrimental colonial heritage which impeded the emergence of a strong secular, democratic, capitalist state.[7] This heritage, patent in many facets of Mexican life, was, in the liberals' view, most evident in the enormous influence that the Catholic Church exercised over Mexican society.[8]

In accordance with the liberals' diagnosis of the cause of Mexico's problems, Comonfort's administration issued from its earliest days new legislation aimed at consolidating state power, secularising Mexican society and modernising the country's economy. Thus, between November 1855 and January 1857, the liberal government published the Juárez Law, which restricted the jurisdiction of ecclesiastical and military courts; the Lerdo Law, aimed at eliminating corporate land ownership, by ordering the sale of land held in mortmain; and the Iglesias Law, which took cemeteries out of Church control and brought an end to the state's collection of tithes on behalf of the Church. These measures met with strong opposition from the Church, the military and the Indian *pueblos* and ignited violent uprisings which under the motto "*Religión y fueros*" ("Religion and privileges") aimed to overthrow the liberal government.[9]

In February 1857 a new constitution was published. The product of a liberal-dominated constituent congress,[10] the 1857 constitution did not only incorporate the triad of controversial laws, but also adopted the federal system; comprised a chapter on individual guarantees; established freedom of education and –in stark contrast to all previous Mexican constitutions—abstained from declaring Catholicism the official religion of the nation.

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[7] Walter V. Scholes, *Mexican Politics During the Juárez Regime, 1855-1872*, Columbia, University of Missouri Press, 1957, p.2.

[8] Recent works have begun to warn against accepting the hitherto prevailing view that the Church was both monolithic and powerful. Josefina Z. Vázquez has drawn attention to the fact that after independence the Catholic Church was debilitated, as a result of the Bourbon reforms and its losses during the wars of independence. Josefina Z. Vázquez, "Centralistas, conservadores y monarquistas 1830-1853" in William Fowler and Humberto Morales Moreno (coords.), *El conservadurismo mexicano en el siglo XIX*, Puebla, Universidad Autónoma de Puebla, 1999, p.118. Brian Connaughton, in turn, has clearly demonstrated the intellectual diversity and regional-based fissures of the Mexican clergy during the first half of the nineteenth century. Brian F. Connaughton, "La larga cuesta del conservadurismo mexicano, del discurso resentido a la propuesta partidaria, 1789-1854" in Fowler and Morales Moreno, *El conservadurismo mexicano...*, pp.169-186.

[9] See: i.a.: Jan Bazant, *Antonio Haro y Tamariz y sus aventuras políticas, 1811-1869*. Mexico City, El Colegio de México, 1985; Bazant, "La Iglesia, el estado y la sublevación conservadora de Puebla en 1856", *Historia Mexicana*, XXXV (1), 1985, pp.93-109; and Guy P.C. Thomson, "La contrarreforma en Puebla, 1854-1886" in Fowler and Morales Moreno, *El conservadurismo mexicano...*, pp.249-250.

[10] Wilfrid Hardy Callcott, *Liberalism in Mexico, 1857-1929*, Hamden, Connecticut, Archon Books, 1962 (1st ed. 1931), p.8.

Opposition to the new constitution made itself felt immediately. The strongest blow would come, however, in December 1857, with Félix Zuloaga's revolt against the constitution and the liberal government. Seeing in this revolt an opportunity to reform the constitution –which, in his view had become the greatest obstacle to peace—, and excited by the possibility of appeasing the moderates, President Comonfort joined Zuloaga and ordered the arrest of his ministers. Yet, less than a month later, disappointed by the ultra-conservative character that the military coup had acquired, Comonfort reversed his actions and ordered the release of his former colleagues before fleeing to the United States.

Among the members of the cabinet who had been released from prison was Benito Juárez, President of the Supreme Court of Justice and, in accordance with the 1857 constitution, first in the line of succession. One day after his release on 11 January 1858, Juárez claimed the presidency and began his struggle in defence of the constitution. Since conservative forces were now in control of Mexico City, where Zuloaga had formed his government, Juárez and his followers moved away from the capital and established the liberal government in the city of Veracruz. These events were the start of what is now known as the Three Years or Reform War (1858-1861), a period where two rival governments existed in Mexico and fought each other with both ideas and arms.

By late 1860 the military balance was in favour of the liberal forces. After three years of war, the conservative army was weak and had been mostly reduced to guerrillas. On 1 January 1861, Juárez, heading the triumphant liberal army, entered Mexico City. Military victory had been attained, and yet, the liberals in power were very debilitated: internally, they were deeply divided; externally, they had to repel attacks from the conservative guerrillas but lacked the resources to do so. Thus, on 17 July 1861, in an attempt to strengthen the government's financial situation, the congress ordered the suspension of payments of domestic and foreign debts. The diplomatic representatives of European creditor countries only learnt of this measure through the press and were thus both surprised and offended.[11] Having failed to persuade the congress to revoke its decision, they broke diplomatic relations with the liberal government eight days later.

The suspension of diplomatic relations gave a new impetus to the Mexican monarchists resident in Europe who, since 1854, had been trying to negotiate with the

[11] Scholes, *Mexican Politics...*, p.75.

ruling houses of Spain, Austria and France the establishment of a Catholic monarchy in Mexico. Lead by José Manuel Gutiérrez de Estrada and José María Hidalgo,[12] these monarchists finally succeeded in eliciting Napoleon III's interest in their project. Thus, when in late 1861 the Emperor of the French decided to send troops to Mexico in conjunction with Spain and England, his intentions went far beyond his stated purposes of claiming the payment of the debt. This became apparent to the other two members of the tripartite expedition, when they were already in Mexican soil. They then entered into negotiations with the Mexican government, reached a diplomatic settlement and withdrew their armies from Mexican territory.

In January 1862 the French troops, hitherto stationed in Veracruz, began their advance towards Mexico City. With the exception of the Battle of Puebla of 5 May 1862, in which the liberal army defeated the interventionist forces, the French troops were successful; and in March 1863 the City of Puebla fell to the French. Fearing the proximity of the French army, Juárez left Mexico City and moved his government to the north of the country. Once again, the liberal government was to be an itinerant one.

The French army entered Mexico City in June 1863. Up to this point, the conservatives' expectation had been that General Forey, commander of the expeditionary troops, would cooperate with the conservative government that had been organised by General Juan Nepomuceno Almonte. What now happened was that Forey announced that Almonte would have to dissolve his government and limit himself "in the strictest manner to carrying out the instructions of the [French] Emperor".[13] These instructions demanded that a governing junta be established and nominate a regency composed of three individuals, who would exercise the executive power. According to Napoleon's wishes, the junta was later to form an Assembly of Notables, which would present proposals regarding the form of government Mexico should have. The Assembly of Notables met in July 1863 and declared that it was the will of the Mexican nation to constitute itself as a moderate, hereditary monarchy headed by a Catholic prince.[14] Less than a year later, the work of the Mexican monarchists finally bore fruit: in June 1864, Maximilian of Habsburg, the long-awaited Catholic prince, made his triumphal entry into Mexico City.

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[12] For an interesting analysis of Gutérrez de Estrada's public life, see: Vázquez, "Centralistas, conservadores...", pp.125-127.

[13] Callcott, *Liberalism in Mexico...*, pp.44-45.

[14] The full text of the Assembly's report on the form of government is reproduced in Rafael Tafolla Pérez, *La Junta de Notables de 1863*, Mexico City, Jus, 1977, pp.109-149.

By the time Maximilian and his wife, Carlotta, arrived in Mexico most of the country's territory was under French control. The liberal army had been dispersed and had re-organised itself into smaller groups, which were carrying out guerrilla warfare against the French army and its conservative supporters. Juárez and his cabinet, in turn, had moved further north. Again, as during the Three Years War, two regimes coexisted in Mexico. But in contrast to the 1858-1861 period, when one government had been conservative and the other liberal, during the years of the empire, both contending regimes happened to be liberal. In effect, disappointingly for the conservatives who had brought him to power, Maximilian was a staunch advocate of liberalism. He fully agreed with Juarez's policies and therefore did little –or nothing—to reverse the course of the president's actions. Unwilling to declare the invalidity of the Juárez, Lerdo and Iglesias Laws, and to restore the Church property that had been sold during Juárez's administration, Maximilian soon awoke the opposition of the Church, the Vatican and, perhaps more importantly, the conservatives. He thus managed to deprive himself of his main sources of support, without being able either to conciliate the liberals –which he secretly aspired to do[15]-- or to find an alternative basis of his power. Furthermore, the confrontation with the Vatican, to which Maximilian's liberal policies had led, ultimately culminated in the total estrangement of the empire from the Holy See, and, to the horror of the Church and conservatives, in Maximilian's ratification of the Laws of Reform, which Juárez had decreed in 1859 to complete the separation of Church and state. A popular witticism at the time had it that Maximilian had been able to accomplish "*Juarismo* without Juárez".

In January 1866 Napoleon III announced his decision to withdraw the French army from Mexico. International circumstances played as important a role in precipitating this decision as Napoleon's disenchantment with the Mexican affair. In Europe, it appeared that France was being drawn into a war with Prussia. At the same time, following the victory of the Northern States in the American civil war, the United States, hitherto unwilling to intervene in Mexican affairs, now made it clear that it would not tolerate any European monarchy in the American continent and much less so in the country on its southern border. Striving to avoid an unwanted war with the United States, France began to withdraw its troops from Mexico in February 1867. Maximilian, who had been unable to create a strong Mexican imperial army, was left to

[15] Jasper Ridley, *Maximilian and Juárez*, London, Constable, 1993, p.179.

rely on the support of the Austrian and Belgian volunteer regiments and the far from consolidated Mexican imperial forces.

As the French withdrew, the liberal troops recaptured towns and villages, and Juárez and his government began to approach the capital. Having lost control over most of the territory, Maximilian then decided to conduct personally the war against the republicans. At the head of the imperial army, Maximilian set out for Querétaro, one of the few cities still under imperial authority. His first and only campaign against the republicans proved disastrous, and in May of 1867 the City of Querétaro fell to the republican army. Maximilian, and Generals Miguel Miramón and Tomás Mejía were then taken prisoner only to be tried and sentenced to death for having attacked Mexican independence. Together with his two generals Maximilian was executed on 19 June 1867.

Maximilian's execution marked the end of the *Reforma*, a period characterised by the struggle to resolve fundamental questions about the organisation of the Mexican state. It can hardly be doubted, however, that what was at stake during these twelve years went far beyond the matters of state power and the political system. The differing perspectives on the form of government, and the relationship between the Church and the state were, in fact, only the most visible elements of two different and even irreconcilable conceptions of Mexico, which were based on different interpretations of history, distinct views of the present, and diverse projects for the future. Indeed, the *Reforma* was the confrontation of two well-defined and clearly opposed ideas of the nation that embodied the values of different and competing segments of Mexican society. The aim of the following pages of this chapter is to chart the conservative idea and inquire into its specific characteristics as well as into the political project it both inspired and embodied.

2.2 Conservatism in Mexico

While the birth of conservatism in Europe has been clearly identified with the publication of Edmund Burke's *Reflections on the Revolution in France* (1790),[16] the date of appearance of conservative tendencies in the Mexican political scene has often

[16] Edmund Burke, *Reflections on the Revolution in France: and on the Proceedings in Certain Societies in London Relative to that Event.* London, Dodsley, 1790.

been a matter of debate. The independence wars (1810-1821),[17] the second proclamation of the Cadiz Constitution (1820),[18] the first reformist movement in 1833,[19] all have been mentioned as moments where the ideas designated by the term "conservatism" became visible. However, although traditionalist ideas might have circulated in Mexico since the second decade of the nineteenth century, it was not until the late 1840's that a militant, well-articulated conservative opposition with a clear political project appeared.[20] The catalyst of this emergence was the war that Mexico fought with the United States between 1846 and 1848.

In fact, Mexico's dramatic defeat in that war and the consequent loss of half the territory to the powerful neighbour were followed by a period of reflection and debate about the past and the future of the country. The chain of misfortunes that Mexico had experienced since independence was put in the spotlight and became a matter for exhaustive analyses. In the conservatives' reading, the origin of Mexico's problems lay in the political institutions adopted by the country's political leadership since 1824. From the conservatives' viewpoint, federalism was the main culprit because it had fostered disunion and localism and had, therefore, irremediably debilitated the country. Concerned with the survival of Mexico as a nation, the conservatives pronounced their verdict in strong and lapidary terms: in adopting "alien" institutions and principles, independent Mexico had broken with its past and had, therefore, condemned itself to internal anarchy and external weakness.[21]

At the heart of the conservative critique lay a profound nostalgia for the peace and prosperity associated with colonial times. This manifest nostalgia has even led some observers to state that "for [the conservatives], the ideal was the Spanish regime prior to independence, but without Spain".[22] To be sure, the Mexican conservatives

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[17] Charles A. Hale. *Mexican Liberalism in the Age of Mora, 1821-1853*. New Haven and London, Yale University Press, 1968, p.15; and François Chevalier, "Conservateurs et Libéraux au Mexique. Essai de sociologie et geographie politiques de l'independence à l'intervention française" in *Cahiers d'Histoire Mondiale*, 8, 1964, p.457.

[18] José María Luis Mora, quoted in Alfonso Noriega, *El pensamiento conservador y el conservadurismo mexicano*, Mexico City, UNAM, 1972, v.1, p.69.

[19] Hale, *Mexican Liberalism* ..., p.15.

[20] William Fowler and Humberto Morales Moreno qualify as anachronistic every suggestion that there existed a conservative political project before the late 1840's. They further stress that prior to that time, when people spoke about "conservative sentiments" they referred "almost exclusively to ethical values that the people of good wanted to preserve from the threat of moral dissolution posed by popular revolt." Fowler and Morales Moreno, "Introducción: una (re)definición del conservadurismo mexicano del siglo diecinueve" in Fowler and Morales Moreno, *El conservadurismo mexicano*..., p.12.

[21] For an illuminating analysis of federalism and centralism as projects based on different "definitions of nationhood", see: Timothy E. Anna, *Forging Mexico, 1821-1835*, Lincoln and London, University of Nebraska Press, 1998, p.116.

[22] Chevalier, "Conservateurs et Libéraux...", p. 457.

longed for the order and abundance that had characterised New Spain; yet, they were far from seeking to preserve the colonial political system. Rather than proposing a return to the colonial order, the conservatives advocated the preservation of the elements of that order that had given New Spain its strength and stability. In this context, tradition and corporatism were to be safeguarded. This did not mean, however, absolute rejection of change. Change was to be accepted as long as it was gradual.[23]

Moreover, as William Fowler and Humberto Morales Moreno have argued, the conservatives' idealisation of colonial times responded to their dream of making of Mexico as prosperous an entity as New Spain had been. Under Lucas Alamán's leadership, the conservatives conceived a project to develop the Mexican economy through the establishment of a strong centralised government that would create the political conditions needed to attract foreign investment.[24] As will be seen below, for these conservatives a monarchy headed by a Catholic European prince represented the best way to attain the desired stability and to set a sound basis for the country's economic development.

The conservatives accompanied these views with a reappraisal of Mexico's history. Starting with the conquest, the conservatives provided an alternative reading of Mexico's historical development and used it to attack some of the liberals' basic assumptions about the country. Furthermore, and perhaps more important, the reinterpretation of history furnished the conservatives with the elements to support a political programme that represented a true alternative to the federalist orthodoxy. While this interpretation encompassed the whole of Mexican history, it focused particularly on the period 1810-1824 during which New Spain transited from being a colony of Spain to being the independent federal republic of the United Mexican States, the country's official name. To understand the conservative discussion of this period – as indeed the liberal one, which will be explored in chapter three—it is necessary to look briefly at the main events that took place during those fourteen years.

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[23] Fowler and Morales Moreno, "Introducción...", p.15 and Brian R. Hamnett, "El partido conservador en México, 1858-1867: La lucha por el poder" in Fowler and Morales Moreno, *El conservadurismo mexicano...*, p.213.

[24] Fowler and Morales Moreno, "Introducción...", p.18.

2.2.1 From colony to federal republic

Napoleon's invasion of Spain in 1808 and the ensuing imprisonment and abdication of Spanish monarch Ferdinand VII in favour of Joseph Bonaparte brought about unprecedented activity in Spain's American colonies. In New Spain, this situation gave rise to a heated debate about the sources and repositories of sovereignty. In congruence with New Spanish social divisions, two clearly identifiable views emerged. On the one hand, the *Real Audiencia* (the colony's high court of justice), firmly backed by Spanish-born functionaries and merchants, asserted that the junta organised by the resistance in Seville should be recognised as the supreme authority and that society and government were to remain unchanged until the legitimate heir to the throne was able to rule again. On the other hand, the *Ayuntamiento* (city council) of Mexico City, stronghold of well-to-do and middle class American-born Spaniards (*criollos*), refused to recognise the Junta of Seville and proposed, instead, the convocation of a junta formed by the New Spanish estates, which would be the provisional repository of sovereignty and would govern New Spain until Ferdinand VII could return to the throne.[25]

Fearing a reform that would give the middle *criollo* strata access to power, the Peninsular Spaniards blocked the way of the *criollos* by deposing the Viceroy Iturrigaray, who, in their view, had shown sympathy for the *criollo* programme, and installing in his place an unconditional supporter of the Peninsular cause. The *criollos*' response to this manoeuvre was varied: while the Mexico City *criollos* persisted in their search for legal ways to attain autonomy, a growing sector of the *criollo* elite, mostly middle-class and provincially-based, decided to resort to violence.

As in other parts of the viceroyalty, in the city of Querétaro a conspiracy took place. Led by royalist officers Ignacio Allende and Juan Aldama, and parish priest Miguel Hidalgo, the members of the conspiracy sought to declare independence from Spain –albeit not from the Crown. They justified their goal by arguing that they feared that the Spaniards who had deposed the viceroy would turn the control of New Spain over to the French, something that, in their view, constituted a serious threat to Catholic religion and cult in the colony.

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[25] For an interesting analysis of the intellectual sources of both programmes, see: Jaime E. Rodríguez, "From Royal Subject to Republican Citizen: The Role of the Autonomists in the Independence of Mexico", in Jaime E. Rodríguez (ed.), *The Independence of Mexico and the Creation of a New Nation*, Los Angeles, UCLA, Latin American Center Publications, 1989, pp.19-43.

On the evening of 15 September 1810, after having learnt that their plot had been discovered by the colonial authorities, Hidalgo and Allende decided to take up arms. In an action that would at once mark the first phase of the war and differentiate the Mexican movement for independence from the rest of the Latin American independence movements,[26] Hidalgo summoned the people of the parish. Mobilising their resentment against their Spanish lords, he exhorted them to join the struggle to defend Ferdinand VII's right to the throne and the Catholic religion, as well as to redress the injustices New Spaniards had suffered at the hands of the Spanish *mal gobierno* (bad government). In appealing to the lower classes, Hidalgo unleashed a rural uprising directed against the oppressors who, in the rebels' eyes, were all Spaniards, regardless of their place of birth.[27] Because of this, the movement spread spontaneously throughout the territory of the colony and acquired a class and race character that not only rendered it extremely violent, but also deterred those *criollos* who aspired to self-rule from joining the revolt.

Hidalgo's original plan for revolution included proclaiming allegiance to Ferdinand VII. However, as it became apparent that the chances of the deposed king's return to the throne were remote, Hidalgo decided to dispense with all reference to the Spanish king and introduced the term "*reconquista*" (re-conquest) to designate the armed movement.[28] This was, however, far from being an open and explicit declaration of independence. In fact, throughout Hidalgo's lifetime independence would not be the stated goal of the struggle.

Failure to attract significant *criollo* support for the movement, internal divisions among the leadership and the disorganisation of their improvised army led to the defeat of the insurgents. Hidalgo, Allende and the rest of the officers were taken prisoner by the royalist army and executed in July 1811. Despite being a serious blow to the insurgency, the leaders' deaths did not, however, bring the movement to an end. Rather, the outcome was that the movement split into two different strands that would at times converge, despite being manifestations of different ideas. On one side, Ignacio López Rayón, a young *criollo* lawyer, who had been Hidalgo's secretary in chief, appeared as

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[26] Luis Villoro, "La revolución de independencia", in *Historia General de México*, Mexico City, El Colegio de México, 1976, v.1, Charles Cumberland, *Mexico, the Struggle for Modernity*, New York, Oxford University Press, 1968, chapter 2, and Alan Knight, "The Peculiarities of Mexican History: Mexico Compared to Latin America 1821-1992", *Journal of Latin American Studies*, 24, Quincentennary Supplement, 1992, p.105.

[27] Rodríguez, "From Royal Subject...", p. 31; and Luis Villoro, "La revolución de independencia", p.619.

his successor and represented the views of the *criollos* who had been striving for autonomy since 1808. On the other side, José María Morelos, a rural priest entrusted by Hidalgo with the southward expansion of the movement, emerged as the undisputed leader of the popular movement advanced by a disciplined peasant army.

While López Rayón worked towards the creation of a junta, which, consistent with the *criollos'* objective of attaining self-rule, would save the royal rights of Ferdinand VII, Morelos began to make it clear through different proclamations that the goal of his movement was independence. Strengthened by a series of military victories, Morelos succeeded in imposing his authority over the *criollo* strand. Thus, on 13 September 1813, a congress summoned by Morelos issued the declaration of independence of *America Septentrional* (Northern America), which was followed in October 1814 by the *Decreto Constitucional para la Libertad de la América Mexicana* (Constitutional Decree for the Liberty of Mexican America). In addition to reiterating the independence from Spain, this primitive constitution adopted the republican system, stated that Catholicism was to be the official and exclusive religion of the nation and embraced the doctrine of popular sovereignty. These provisions, no doubt, reflected a significant shift in the ideas on which the insurgency was based. This shift had been triggered by the promulgation of the Spanish liberal constitution in 1812.

Interestingly enough, while Morelos and his followers, influenced by the rise of liberalism, established the congress that would ultimately declare Mexico's independence, liberalism in Spain was under attack. Indeed, in April 1814 Ferdinand VII returned to the throne and ordered the suppression of the Cadiz constitution both in Spain and in the colonies. In the meantime, in New Spain, Juan Ruiz de Apodaca, the newly appointed viceroy, sought to counter the insurgency through a policy that combined conciliation and repression. His efforts were fruitful and in 1815 Morelos was captured and executed. By 1817 little remained of the insurgent movement: only fugitive bands commanded by Guadalupe Victoria and Vicente Guerrero were still active.

Once the popular movement had been contained, the *criollos* who since 1808 had been inclined to struggle for autonomy, no longer believed popular revolution to be a possibility. They therefore redoubled their efforts to attain home rule. The occasion to break with the metropolis eventually came in 1820, with the liberal revolution in Spain and the restoration of the Cadiz constitution. As soon as news of events in Spain

[28] Hugh M. Hamill, *The Hidalgo Revolt; Prelude to Mexican Independence*, Gainesville, University of

reached the colony, the New Spanish elite, who had already enjoyed the benefits of the home rule institutions created by the Constitution of 1812, enthusiastically grasped this second opportunity to attain political power at home.[29]

Yet, not all sectors of New Spanish society welcomed the restoration of the liberal constitution. For corporations such as the Catholic Church and the army the Cadiz fundamental law, represented a serious threat.[30] Faced with the imminent loss of their status and wealth, high-ranking members of the army and Church conceived of a project to stop the proclamation of the Cadiz constitution in New Spain. Aware of the need to count on some kind of military support for the success of their enterprise, the plotters approached Agustín de Iturbide, a *criollo* officer hitherto known for his implacable suppression of the insurgency, and ensured his participation in the plan.

The Plan of La Profesa, as this project was known, was however frustrated in May 1820, when Viceroy Apodaca proclaimed the Cadiz constitution in New Spain. Ironically, in November 1820 Iturbide was appointed by the colonial authorities to command the southern military district, the area where the insurgency was still active. By January 1821 Iturbide had established contact with Guerrero, the leader of the insurgent forces, and began to entertain the idea of declaring independence on terms that would "preserve and protect the interests of the Church, the army and the nation".[31] Thus, on 24 February 1821 he officially announced the Plan of Iguala, which declared the independence of *la América Mexicana* (Mexican America) from Spain. In accordance with tradition, the Plan declared the Catholic religion to be the exclusive religion of the nation and preserved the privileges of the clergy. With regard to the political regime, the plan stated that the monarchy was to be kept as the system of government of the new state, and proposed to offer the throne to Ferdinand VII himself, or to any other member of the Bourbon House. Finally, the Plan of Iguala demanded that Europeans, *criollos* and Indians unite in a single nation. Independence, unity and the Catholic religion became thus the three guarantees upon which the new Mexican nation was to be founded.

Florida Press, 1966, p.131.

[29]Jaime E. Rodríguez, "The Transition From Colony to Nation: New Spain, 1820-1821", in Jaime E. Rodríguez (ed.), *Mexico in the Age of Democratic Revolutions, 1750-1850.* Boulder, Lynne Rienner, 1994, p.100.

[30] Roberto Breña has argued that rather than the restoration of the Cadiz constitution itself, it was the anti-corporatist measures decreed by the Cortes of Madrid in 1820 that caused alarm among the New Spanish *criollos*. See: Roberto S. Breña, "La independencia de México. Dónde quedó el liberalismo? Historia y pensamiento político", *Revista Internacional de Filosofía Política*, 16, 2000, pp.59-94. I thank José Antonio Aguilar for drawing my attention to this article.

[31] Rodríguez, "The Transition...", p.121.

The Plan of Iguala was sworn on 2 March 1821. Whereas the *criollo* oligarchy, the Church and the army –pleased by its anti-liberal character—advocated it wholeheartedly, Guerrero and the other rebel leaders saw in the Plan their only chance of attaining independence and finally decided to back it on 9 March. In this way, the *criollo* and the popular movement converged. In no time and without bloodshed, Iturbide gained control of the most important cities of New Spain. On 23 August 1821, he and the newly appointed political chief of New Spain, Juan de O'Donoju, met to discuss the situation of the colony and signed the Treaties of Cordoba, whereby the independence of New Spain was decreed. On 27 September 1821 victorious Iturbide entered in Mexico City at the head of the "Army of the Three Guarantees" and one day later the Act of Independence was sworn.

Spain, however, did not recognise Mexican independence. On the contrary, the Spanish Cortes rejected the Treaties of Cordoba and thereby eliminated the possibility of a member of the Spanish royal family's becoming the first Mexican emperor. In a move that would bring about enormous unrest, Iturbide, backed by the army, crowned himself Emperor on 21 July 1822. In reaction to these events, a plot was organised to bring down the empire and establish a republic. When Iturbide heard of this conspiracy and learnt that some deputies were involved in it, he decided to repress the congress. The congress resisted these measures and Iturbide responded by dissolving it.

The suppression of the congress unleashed the forces opposed to Iturbide. An uprising led by Antonio López de Santa Anna began in January 1823 with the aim of overthrowing the emperor. Two months later, Iturbide abdicated. According to the Plan of Casa Mata, the document which had united Iturbide's adversaries, a new congress was to be summoned that would constitute the nation anew. This congress met at the end of 1823 and by 31 January 1824 it had approved a new constitution in which the republican and federal systems were adopted.[32]

These were the events whose interpretation by liberals and conservatives reflected different –indeed, opposed—understandings of the essence and characteristics of the Mexican nation. As regards the conservatives, they would base their idea of the nation and the consequent political project on a reading of Mexican history that was most fully developed by Lucas Alamán (1792-1853), an intellectual and politician frequently identified as "the father of Mexican conservatism".[33]

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[32] For a fascinating analysis of early Mexican federalism and its role in the "construction of nationhood", see: Anna, *Forging Mexico....*

[33] Noriega, *El pensamiento conservador...*, v.1, p.67.

2.2.2 Lucas Alamán's conservative interpretation of history

That Lucas Alamán experienced first-hand the destruction and suffering brought about by the war of independence is frequently mentioned as one of the main causes of his aversion to revolution and, ultimately, of his advocacy of conservative ideas.[34] That he grew up during the last stage of the Spanish colonial administration in the rich mining town of Guanajuato and enjoyed the economic abundance related to that industrial sector in the colony appears to account, on the other hand, for his idealisation of pre-independence times. Be the underlying causes what they may, the fact is that Alamán devoted the best part of his mature life to the formulation of a project that, based on tradition and custom, would give Mexico the strength and grandeur that –he maintained—the country deserved.[35] In seeking what he regarded as the key to the country's stability and splendour, Alamán turned to the past and found in history a guide from which he strove to draw lessons that could be applicable to the present.[36] Hence the profuseness and depth of his historical writings.[37]

For Alamán, the history of Mexico began with the conquest. Although he acknowledged and, to some degree, even expressed his admiration for pre-Hispanic cultures, he rejected the idea that they could be justly deemed "the origin of Mexico". Underlying this view was a concept of "unity" as a pre-condition of national existence. In Alamán's opinion, the pre-Hispanic peoples, as remarkable as they may have been, were deeply divided. It was this lack of unity among them, rather than the overwhelming strength of the Spaniards, that ultimately accounted for their defeat and the ensuing colonial domination. Unity –Alamán argued—had been possible only after the conquest, for it was this event that provided a unifying principle by means of

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[34] See the prologue by Moisés González Navarro to Alamán's *Historia de Méjico...*, as well as González Navarro, *El pensamiento político de Lucas Alamán*, Mexico City, El Colegio de México, 1952.

[35] For Alamán's life as a politician, see: González Navarro, *El pensamiento político...;* José Valadés, *Alamán: estadista e historiador.* Mexico City, UNAM, 1977 and, of more recent publication, Vázquez, "Centralistas, conservadores...", pp.121-124 and Brian R. Hamnett, "El partido conservador en México, 1858-1867: La lucha por el poder" in Fowler and Morales Moreno, *El conservadurismo mexicano....* pp.215-217.

[36] Hira de Gortari Rabiela, "Realidad económica y proyectos políticos: Los primeros años del México independiente" in Cecilia Noriega Elío (ed.), *VIII coloquio de antropología e historia regionales: El nacionalismo en México*, Zamora, Michoacán, El Colegio de Michoacán, 1992, p.165.

[37] Lucas Alamán, *Historia de Méjico desde los primeros movimientos que prepararon su Independencia en el año 1808 hasta la época presente.* 1850. 5 v. Facsimile edition: Mexico City, Instituto Cultural Helénico-FCE, 1985; and *Disertaciones sobre la historia de la república mejicana desde la época de la conquista por don Lucas Alamán*, Mexico City, Publicaciones Herrerías, n.d.

instituting mores and customs, language, law and a political, social and religious order.[38] In this interpretation of the origin of Mexico, Hernán Cortés, conqueror of Aztec empire, emerged as the founding father of the nation.

The general balance of the three centuries of colonial rule was, in Alamán's viewpoint, a positive one. He portrayed New Spain as a wealthy entity characterised by order and stability and founded on solid and respected institutions. Although as a Creole aristocrat himself, Alamán was aware of the main colonial grievances and recognised the political and social inferiority imposed on the *criollos* by the colonial administration, on the whole, colonial rule did not appear to be oppressive to him. In his view, independence had been inevitable, but not because of the alleged tyranny of the Spanish government. Rather, independence, when finally attained by Agustín de Iturbide in 1821, had been the result of a slowly evolving process nurtured and prepared by centuries of generally enlightened and progressive policies.

As a follower of Burke, Alamán abhorred revolutionary change. He favoured, instead, slow, gradual evolution ruled by morality, religion and customs.[39] It was, in fact, the conviction of the evil character of revolution that was at the basis of one of Alamán's best-studied facets: his reinterpretation of the war of independence.[40] Rejecting the hitherto dominant view that the independence movement had been an integral one, of which Miguel Hidalgo's call to arms had been the beginning and Agustín de Iturbide's ultimate attainment of independence the felicitous conclusion, Alamán, argued that the war of independence had comprised, indeed, two different movements. The first one, initiated by Hidalgo in 1810, had not been intended, according to him, to procure independence, nor had it been the expression of the Mexicans' feelings and thoughts. More accurately –Alamán asserted—, the popular movement had only been a violent and anarchical uprising of the mob against the propertied classes. In Alamán's view, Hidalgo had been nothing but a demagogue who had "exaggerated the democratic doctrines of the French Revolution".[41]

Approving of the lack of support that the movement led by Hidalgo had had among the *criollo* and higher echelons of New Spanish society, Alamán further contended that "the events of that time were judged by the thinking men of the country,

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[38] Lourdes Quintanilla Obregón, "El nacionalismo de Lucas Alamán", in Noriega Elío (ed.), *El nacionalismo en México,* p.379.

[39] Noriega, *El pensamiento conservador...*, v.1, p.69.

[40] See *i.a.*: O'Gorman, *La supervivencia política novohispana; reflexiones sobre el monarquismo mexicano,* Mexico City, Fundación Cultural Condumex, 1969, pp.38ff ; Hale, *Mexican Liberalism...*, pp.19ff and Alfonso Noriega, *El pensamiento conservador...*, v.1, pp.90ff.

who, far from taking part in favour of the incomprehensible cause of the first insurgents, fought [against this cause] with all their strength until they annihilated it".[42] The time for independence would come, however, after the natural evolution of society had taken place. It was then, almost ten years after Hidalgo's movement had started, that Agustín de Iturbide, "friend of independence, foe of the insurgents",[43] achieved independence through a simple break of political ties with Spain. For Alamán the success of Iturbide's enterprise had been possible thanks to the true principles that had inspired his movement, i.e. the three guarantees proclaimed in the Plan of Iguala. "Religion, independence and unity" became, in Alamán's interpretation, the cornerstone of Mexico's existence, the learned and decent men its guarantors.

Alamán believed that Mexico had been born to independent life with an admirable programme that not only had not broken abruptly with the past, but had also succeeded in preserving its worthiest elements. The tragedy had been that the Plan of Iguala had never materialised. Alamán deplored Iturbide's decision to crown himself Emperor, but even more than Iturbide's ambition and the collapse of his short-lived empire, Alamán lamented the adoption of the federal republican system after 1824. For embracing such a system represented, in Alamán's opinion, a radical break with the past. Moreover, Alamán claimed that in constituting Mexico as a federal republic, the political leaders appeared to have presupposed that the order formed and established during three hundred years of Spanish rule had disappeared as if by magic; and that the Mexican nation was composed of individuals who had just come out of nature's hands, without memories, aspirations or previous rights.[44]

For Alamán, the adoption of republican federalism in Mexico was to be blamed, to a great extent, on the dissolving and nefarious influence of the United States. In fact, Mexico's northern neighbour elicited in Lucas Alamán a mixture of fear and contempt that he openly expressed. Especially after the 1846-1848 war, Alamán was convinced that the United States' ultimate goal was to take over whatever was left of Mexico. The internal turmoil that had become normalcy in Mexico after 1824, and that had so much facilitated the victory of the United States' army had its roots, Alamán claimed, in the subservient imitation that Mexican politicians had made of the United States' institutions. Alamán further regretted that in mirroring the first-ever federal republic,

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[41] Hale, *Mexican Liberalism...*, p.20.
[42] [Lucas Alamán], "Aniversario del grito de Dolores", *El Universal*, Mexico City, 16 September 1849.
[43] Ibid.
[44] Noriega, *El pensamiento conservador...*, v.2, p.352.

the Mexicans had not taken into account the differences in origin, religion and history that made the two societies fundamentally different:

> Not considering that our social, political and religious unity advised us to adopt the monarchical form of government, just like the diversity of cults, of peoples, of languages advised them [the United States] to adopt the republican form and the federal organisation, we believed that the easiest way to ensure our political liberty was to throw ourselves into the arms of the United States of America.[45]

At the bottom of this critique lay, once again, the concept of unity, which in this context clearly referred to the unity that the Mexican nation had allegedly achieved during the colonial rule through colonial institutions. It was this unity that existed among the Mexicans that, in the eyes of Alamán, rendered the federal system totally inadequate for Mexico and made the monarchy, in turn, the ideal form of government. Indeed for Alamán the monarchical system was the best Mexico could aspire to, for not only was it in line with the colonial experience, but it also made it possible to recover the main features of pre-independence social organisation; namely, a strong government, a centralist structure and Catholic religion as an organising principle. In Alamán's view, all these elements had been either lost or, at least, strongly undermined by the adoption of the federal republican system. To him, this meant that everything was destroyed and that it was necessary to rebuild Mexico. Ideally this necessary reconstruction would have assumed a monarchical face; however, during Alamán's lifetime the likelihood of the success of the monarchical project was –at best— extremely limited.[46]

By early 1853, a few months before his death, Lucas Alamán had formulated his last alternative project for the salvation of Mexico. In it he advocated the preservation of the Catholic religion, because he considered it to be "the only common bond that links all Mexicans, after all the rest have been broken".[47] He further proposed the eradication of the federal system and the political reorganisation of the territory in a similar fashion to that which existed during colonial times. Finally, Alamán suggested

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[45] *El Tiempo*, Mexico City, 7 February 1846.

[46] For an illuminating analysis of Mexican monarchism at the end of the 1840s, see: Elías José Palti (comp.), *La política del disenso. La "polémica en torno al monarquismo" (México, 1848-1850)...y las aporías del liberalismo*, Mexico City, Fondo de Cultura Económica, 1998.

[47] Lucas Alamán a Antonio López de Santa Anna, Mexico City, 23 March 1853; reproduced in *El Partido Conservador en México*, Mexico City, Imprenta de Andrade y Escalante, 1855.

the establishment of a strong, centralist government that would structure the nation anew.

Lucas Alamán died in June 1853, shortly after communicating his project to Antonio López de Santa Anna who, brought to power by the conservatives, eventually dispensed with their programme and ruled as a dictator. Alamán did not live to see Santa Anna's last dictatorship or Maximilian's empire. Nor did he take part in the War of Reform and the ensuing events in which conservatives and liberals engaged in a struggle to the death. However, Lucas Alamán was an important figure in all these episodes, for his ideas were at the core of the creed that the Conservative Party of the *Reforma* period defended until the very last sigh.

2.3 The Conservative Party: Its creed and its programme

Strictly speaking, the Conservative Party did not exist. While it is undeniable that an active group of advocates of conservative thought began to make itself heard since 1846, it is also true that such a group was never organised as a political party with clear headquarters, representation organs and registered membership.[48] The Conservative Party was, rather, a group of people who represented the interests and ideas of a sector of Mexican society, especially those of the landed classes and the Catholic Church.[49] Since 1849, however, the members of this group participated openly in the electoral struggle under the banner of conservatism and succeeded in advancing their influence, especially in Mexico City. Although never organised as a party, the politically active conservatives conceived of themselves as composing the "Conservative Party" and had, furthermore, a clear idea of the values this party aimed to promote. In an editorial article published by the conservative *El Universal* in 1849 the author explained: "We repeat today together with the famous historian Capefigne in his latest and most recent work: 'The conservative party is the one that seeks to preserve, as a sacred traditions

[48] Jorge Adame Goddard. *El pensamiento político y social de los católicos mexicanos 1867-1914,* Mexico City, UNAM, 1981, p.l. For an alternative reading that places the concept of "party" within the framework of mid-nineteenth-century Mexican politics, see: Palti, *La política del disenso...,* pp.44-46.

[49] For a more detailed characterisation of the Conservative Party's bases of support, see: Chevalier, "Conservateurs et libéraux...", pp.60-64.

the [Catholic] religion, property, family, authority, rational liberty; in sum, the foundations of all well organised societies.'"[50]

That the Conservative Party lacked formal organisation was further confirmed by Alamán himself in a 1853 letter to Santa Anna.[51] That such a party espoused clearly defined views was also left undoubted:

> Not being the conservatives organised as franc-masonry, you ought not to believe that Mr. Haro [our envoy] represents the opinion of a body; however, since all of those who hold the same opinion are related, in such a way that we understand each other and act in agreement from one end of the Republic to the other, you can listen to all of what Mr. Haro says as the abbreviated expression of all the landed people, the clergy, and all of those who want the good of the *patria*.
> [...] Our envoy will request nothing from you, [...] he only wishes to manifest the principles that the conservatives profess and that, by a general impulse, all people of good follow.
> The first one is to preserve Catholic religion, because we believe in it, and even if we did not hold it for divine, we consider it to be the only common bond that links all Mexicans [...]. We also believe that it is necessary to support the Catholic cult and the Church property with splendour [...].
> We wish the government to have the necessary strength to comply with its duties, albeit subject to principles and responsibilities in order to prevent abuses.
> We are decidedly against the federation, the representative system [...] and everything that might be called popular suffrage [...].[52]

After Lucas Alamán's death in 1853 and the ensuing betrayal of the conservative project by Santa Anna, which brought painful discredit to the conservatives, the members of the Conservative Party were compelled to restate their position and vindicate their ideas. For instance, in *El Partido Conservador en México*, an apocryphal document published in 1855,[53] the author sets out to defend the conservative ideas "so much attacked in the past" and further attempts to "indicate the means to apply them in the future, as the only way to save our race from total extinction".[54] In analysing the origin of the conservative ideas, the author stated that:

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[50] "Confesiones del Siglo" in *El Universal*, Mexico City, 13 October 1849. The quotation refers to M. Jean Bapstiste Honoré Raymond Capefigue's, *Histoire de la restauration et des causes qui ont amené la chute de la branche ainée des Bourbons*, Paris, Charpentier, 1842-1845.
[51] Lucas Alamán a Antonio López de Santa Anna, Mexico City, 23 March 1853; reproduced in *El Partido Conservador en México*. Mexico City, Imprenta de Andrade y Escalante, 1855.
[52] Alamán a Antonio López de Santa Anna, p.40.
[53] *El Partido Conservador en México*, Mexico City, Imprenta de Andrade y Escalante, 1855. Alfonso Noriega attributes this pamphlet to either Bernardo Couto or J.J. Pesado, both prominent conservatives, in *El pensamiento conservador...*, v.2, p.293.
[54] *El Partido Conservador...*, p.4.

> The conservative ideas, that is to say moral and religious ideas applied to human society, respect for family ties, respect for private property and public authority, and as a consequence of this all, the administration of the government placed in the hands of capable and honest men, are ideas that exist by conviction in the heart and spirit of all reasonable and enlightened people and by instinct among the lowest and most ignorant classes of society.[55]

In the understanding of *El Partido Conservador*'s author society itself appeared, therefore, to be the source of the essential principles of conservatism. Yet, it was only a fraction of Mexican society that could be designated "Conservative Party". This fraction, the author asserted, taking into account the Mexicans' inexperience in political and administrative affairs, believed in the need of a strong government that, rather than being a regulating force, would become the principal engine of society.[56] Thus, in this interpretation, whereas the conservative creed had its origins in and was shared by society at large, the Conservative Party was the particular group that propounded a strong, centralist government.

Four years after the publication of *El Partido Conservador en México* an attempt was made to organise a "Conservative Society" as a "political lodge" –a term used derisively by a liberal detractor. Although, yet again, this organisation was not fashioned as a political party in the modern sense of the word, it had a somewhat elaborate structure and clearly defined objectives. In the *Reglamento de la Sociedad Conservadora de las Garantías Sociales* (Rules of the Society for the Conservation of the Social Guarantees) published in 1859,[57] the Conservative Party was defined as "the reunion of all honorable persons who profess and practise the constitutive principles of a religious, cultivated and tranquil society".[58] The declared aims of the Society/Party were, in turn, to preserve Roman Catholicism as the sole creed of the nation; to protect the right of property of both corporations and individuals; "to work in favour of the political nationality throughout the extension of the Republic";[59] to enhance authority

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[55] Ibid., pp.4-5.
[56] Ibid., pp.5-6.
[57] *Reglamento de la Sociedad Conservadora de las Garantías Sociales*, Mexico City, 1859. This document, attributed to Manuel Díaz Bonilla, a conspicuous conservative who was seen by many as the successor of Lucas Alamán, can be found in volume 644 of the Lafragua Collection, Biblioteca Nacional de México, Mexico City. Hereafter cited as *LAF*.
[58] Ibid., p.5.
[59] Through the notes that the liberal commentator of this document inserted in the edition available at the Lafragua Collection, it becomes apparent to the general reader that this proclaimed object refers to sovereignty *vis-à-vis* other nations and territorial integrity. Ibid., p.9.

in the public sphere as well as in private family relations according to valid legislation; to protect the inviolability of social guarantees; to procure that education, guided by religious principles and delivered by Catholic teachers of good reputation and knowledge, be the only one permitted at private schools; to encourage industry and employment in honest and useful activities as a foundation of public well-being and peace; and to reorganise public finances.[60]

It is interesting to note that the *Reglamento* was published in 1859, as the War of Reform was well under way and the conservatives occupied the capital, therefore becoming, in the eyes of many, the legitimate national government. Thus, despite the fact that the *Reglamento* was never declared to be an official document, it constitutes the best approximation there is to a declaration of principles of the conservatives in power.[61]

After the 1861 victory of the liberals in the War of Reform, the conservatives saw few possibilities of executing their project. For one thing, not only had their defeat been accompanied by public stigmatisation,[62] but also many of the leading conservatives had been expelled from the country. Moreover, they had been tremendously weakened and could not attempt to reorganise openly as an opposition force. Regarding their own strength as insufficient to pursue their enterprise on their own, the conservatives then decided to turn to Europe in search for support. This decision brought about an important change in the conservative project: the Plan of Iguala, which had always been a source of inspiration for the conservatives became, once again, the goal to achieve. Religion, independence and unity were proclaimed to be –as they had been since the beginning of the War of Reform[63]— the guiding principles of the nation. However, on this occasion the adherence to the principles of Iguala went far beyond the enunciation of the three guarantees. It entailed, above all,

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[60] Ibid., pp.6-11.

[61] Miguel Miramón's *A la nación* appeared later in 1859 and focuses on administrative matters rather than on political ideas. See: *Miguel Miramón, general de división en gefe del ejército y presidente sustituto de la República Mexicana a la nación.* Chapultepec, 12 July 1859 (*Archivo General de la Nación*, Folletería, caja 10, folleto 565; hereafter cited as *AGN*).

[62] See: *Proceso instruido a los Ex-Ministros de Estado, Señores Luis G. Cuevas, D. Manuel Díaz de Bonilla, D. Manuel Peña y Cuevas y D. Teófilo Marín, y Ex-Gobernador del Distrito, D. Miguel Ma. Azcárate: acusados de usurpación del poder público por las funciones que desempeñaron en la República entre los años 1858 y 1860.* Mexico City, Imprenta de José Mariano Lara, 1861.

[63] For instance, in his inauguration speech as interim president, Félix Zuloaga stated: "I swear before God and the Mexican Nation to fulfill with honour and loyalty the duties of interim President of the Republic that have been bestowed upon me through the Plan of Tacubaya [...] and to observe the *Catholic religion*, to support *independence*, to promote with tenacity the *unity* among all Mexicans and to do whatever is required for the good of the nation." ["Toma de posesión del General Zuloaga"], in *Diario Oficial del Supremo Gobierno*, Mexico City, 24 January 1858. Emphasis added.

bringing the original plan to fruition through the establishment of a constitutional monarchy, led by a Catholic European prince.

The wheels of Mexican monarchism were set in motion. Joined by the defeated conservatives,[64] the Mexican monarchists endeavoured to rescue Mexico from the chaos that, in their view, had been brought about, first, by the adoption of the republican system and, second –and perhaps more important—, by the fierce attack on the Catholic religion and Church that the 1857 liberal constitution and the 1859 Laws of Reform represented. Indeed, the secularising laws decreed and enforced by the victorious liberals appeared to the conservatives as much more than an attempt to curb corporate privileges. For them they were, rather, a blatant attack on the main pillars of Mexican nationality. Moreover, what the conservatives saw as a profound internal weakness resulting from the dissolution of the religious and moral principles provoked by the liberal regime was accompanied by an ever-present fear of the United States. In the conservatives' eyes, decaying within and threatened from the outside, Mexico would soon face extinction.

As it was presented to the European powers, the conservatives' plea for help was founded on the conviction that, should Europe fail to intervene, Mexico would be absorbed by its northern neighbour. As early as 1840, the precocious monarchist, José Manuel Gutiérrez Estrada, had expressed his persuasion that a monarchy under a European prince was the only viable way to bring about peace to Mexico, and therefore, "to save our nationality, imminently threatened by the Anglo-Saxon race, which transported to this continent, is prompt to invade everything supported by the democratic principle, which is an element of life and strength for them, but the germ of weakness and death for us".[65] The same kind of argument was put forward time and time again during the intense campaign to bring the Mexican Empire into being. In 1859, for instance, while the conservatives held power in Mexico City, José María Hidalgo, former Mexican diplomat and enthusiastic supporter of the monarchy now

[64] There were, of course, exceptions. Initially both Miguel Miramón and Leonardo Márquez expressed their reservations about the idea of intervention and monarchy. Ultimately, however, both adhered to Maximilian's empire. For Márquez's viewpoint see: *Manifiesto que dirige a la Nación Mexicana el General de División Leonardo Márquez,* New York, Establecimiento Tipográfico, 1868.

[65] José Manuel Gutiérrez Estrada, *Carta dirigda al Escmo. Sr. Presidente de la República sobre la necesidad de buscar en una convención el posible remedio de los males que aquejan a la República y opiniones del autor acerca del mismo asunto, por [...]*, Mexico City, Imprenta de Ignacio Cumplido, 1840, p.55.

living in Paris, published a pamphlet "aimed at proving that the nationality of Mexico [would] soon be lost if European intervention [did] not save it".[66]

Underlying this belief was not only the fear of a powerful neighbour that had already shown the dark side of its strength, but also a much more complex, though not always obvious, rejection of a different way of being. For the conservatives, the United States epitomised, in many ways, everything that Mexico was not.[67] The mistrust of the United States stemmed, therefore, from more than the dread of annexation. Although, clearly, the survival of Mexico as an independent state was of concern to the conservatives, the preservation of what they thought to be the Mexican essence embodied in language, religion and tradition was to be the undisputed priority. A passage in J.M. Hidalgo's pamphlet illustrates this:

> I cannot believe that there are Mexicans who prefer the American protectorate [to a European intervention]. I cannot believe that there are men so blind that they forget the proof of power that they gave us in [1]847; that forget the origin of their race, the religion they profess, the language they use, their customs, their demeanor, their profound contempt toward us, the arrogance with which they treat us and the political institutions that they so rudely practise. This [American] race [...] does not mingle and assimilate with the peoples it conquers; it destroys them.[68]

European intervention and later the monarchy under Maximilian of Habsburg found then, their main justification in the safekeeping of those properties so dear to the conservatives. Political independence could in this light be sacrificed for the sake of the preservation of the Mexican soul:

> That the remedy [of intervention] is severe; that it will somehow humiliate our national pride, all that is true. But I ask those who do not think like I do [and oppose intervention] because of this: what is worse? To wait quietly until we are absorbed by the United States or to frankly request the European intervention?[69]

Anticipating the criticisms that the conservatives might face for allegedly attempting against Mexico's independence, J.M. Hidalgo made it clear that no real independence

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[66] [José María Hidalgo], *Algunas indicaciones acerca de la intervención europea en México*, Paris, E.Thunot & Co., 1859, p.5.
[67] Edmundo O'Gorman presents an interesting analysis of the tension arising from this opposition in his *México, el trauma de su historia*, Mexico, UNAM, 1977.
[68] [Hidalgo], *Algunas indicaciones acerca...*, p.19.
[69] Ibidem.

was possible under alien institutions and laws, under patterns of life that did not agree with the traditional national character. He further argued that it was the liberals, and not the conservatives, who should be considered traitors to the nation, because "the treason or the error rests with those who contribute to the loss of our nationality, to the enslavement of our society, to the disruption of the political balance and even to the disappearance of Catholicism from our country".[70]

When in 1863 the Conservative Party could finally fulfill its dream of consummating the programme first delineated forty-two years earlier in the Plan of Iguala, it resorted to the arguments that Gutiérrez Estrada and Alamán had defended since the 1840's. The *Dictamen de la Forma de Gobierno*,[71] the document that justified and further decreed the establishment of the Mexican Empire, barely added anything new to the already aged idea that adopting the federalist republican form of government had been a fundamental error and the beginning of all of Mexico's misfortunes. The *Dictamen* further stated that in embracing such a system Mexico had "awkwardly abused its emancipation". The matter of the threat posed by the United States was also present. However, the blame on the liberals for rendering Mexico so weak and easy prey to the United States was further transformed into an outright accusation of treason. For the conservatives, the liberals had betrayed the nation not only because they had undermined the basis of nationality from within, but also because during the War of Reform they had negotiated the McLane-Ocampo treaty with the United States and had therewith put at risk Mexico's integrity.[72] In defending themselves from the accusation of traitors to the nation that the liberals had cast upon them, the conservatives were prompt to indicate that "in order to accomplish their anti-national thought, the

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[70] Ibid., pp.23-24.

[71] *Dictamen de la Forma de Gobierno presentado por la Comisión Especial que en la sesión del 8 de julio de 1862 fue nombrada por la Asamblea de Notables reunida en cumplimiento del decreto de 16 de junio último.* 10 July 1863. Reproduced in: Tafolla Pérez, *La Junta de Notables...*, pp.109-147.

[72] On 1 December 1859 Robert McLane, United States representative in Mexico, and Melchor Ocampo, minister of foreign affairs of Juárez's government, signed the McLane-Ocampo Treaty, which granted the United States and its citizens perpetual right of transit along the Tehuantepec Isthmus, created a free trade zone at both the East and West sides of the isthmus, granted the United States the right to defend with military force the lives and properties of its citizens along the isthmus without having previously obtained the approval of the Mexican government and conferred the right of transit to United States troops along different routes in Mexican territory. In exchange for these concessions the Mexican government was to receive –officially—four million *pesos duros*, and –unofficially—the United States' support in the battle against the conservatives. The Senate of the United States did not ratify the treaty and thus, it never came into force. For the text of the treaty, see: Ernesto de la Torre Villar (*et al.*), *Historia Documental de México*, Mexico, UNAM, 1964, v.2, pp.306-310. For the reaction of the conservative government, see: ["El ministerio de relaciones exteriores inserta la protesta que el Gobierno Supremo de la República ha hecho en contra de los tratados o convenios que el llamado Gobierno Constitucional ha ajustado en Veracruz con el Americano del Norte por medio de su agente McLane".] *AGN*, Gobernación, legajo 144, caja 1, exp.2.

demagogues [i.e. the liberals] were about to cede to the neighbour republic the richest part of our territory, while those who requested help from France, England and Spain [i.e. the conservatives] did not do it but to safeguard, above all else, the integrity and independence of Mexico".[73]

It was, in fact, as saviours of the nation that the conservatives conceived of themselves. Hence the messianic air that the special commission in charge of discussing the form of government Mexico was to adopt impressed on its *Dictamen*:

> The Commission, supported by the integrity that the holy faith in duty produces [and] by the courage infused by the joyful hopes that nurture the purest and most disinterested patriotism, will finally pronounce the magic word, the name of the marvelous institution that in its view encloses a whole future not devoid of glory, honour and prosperity for Mexico. This word, this institution is the monarchy.[74]

As the monarchy was finally proclaimed, the invitation to Ferdinand Maximilian of Austria to assume the Mexican throne completed the ideal vision of a Catholic monarchy led by a European prince, contained in the Plan of Iguala. It was thus not casually that in his speech offering the Mexican throne to Maximilian, J. M. Gutiérrez Estrada pointed to the strong relation between the 1821 and 1863 adoption of the monarchy:

> We cannot forget, Sir, that this act is taking place, thanks to a felicitous coincidence, a few days after [our] country celebrated the anniversary of the day in which the national army triumphantly planted in the Mexican capital the standard of independence, and proclaimed the monarchy, calling to the throne an Archduke of Austria for lack of a Spanish *Infante*.[75]

With these events –asserts Edmundo O'Gorman— the conservative solution culminated and exhausted itself without actually reaching its full realisation.[76] For, as was mentioned above, Maximilian's rule proved to be, to the conservatives' dismay, more liberal than Juárez's and was, consequently, far removed from the conservative ideal of pre-independence Mexico. Thence its ultimate isolation and failure.

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[73] *Dictamen de la forma de Gobierno*...,p.126.
[74] Ibid., p.129.
[75] José Manuel Gutiérrez Estrada, "Discurso pronunciado en el Palacio de Miramar el 3 de octubre de 1863 por [...], presidente de la delegación mexicana encargada de ofrecer a nombre de la Junta de Notables la Corona de México a SAIyR el Archiduque Maximiliano de Austria", reproduced in Tafolla Pérez, *La Junta de Notables*..., p.172.

Although the tragic end of the empire eliminated once and for all the possibilities of realisation of the conservatives' monarchical project, it had little impact on the conservative idea of the nation. The central elements of this conception of Mexico continued to exist after the political debacle and made up the core of the conservative conceptualisation of Mexico that, despite the liberals' political dominance, continued to be spread among the Mexican people. It is to the components of this idea that I would now like to turn.

2.4 The nation of the conservatives

In the previous pages I have tried to outline the main characteristics of the Conservative Party's project and creed. To that end, I have devoted particular attention to the conservatives' idealisation of the colonial past, their defence of the Catholic religion and Church, their rejection and fear of the United States and their monarchical project. In so doing, my intention has been to provide a general framework in which to inscribe the following analysis of the conservative idea of the nation.

As I mentioned in the introduction of this chapter, it is my contention that Mexican conservatives had, by and large, an ethnic conception of the Mexican nation. For them Mexico was, above all, a community of descent united by culture and religion. Interestingly enough, however, the "fictive super-family" to which the conservatives thought to belong had hardly anything to do with the specificity of native Mexico. Rather, this "family" was visualised in terms of its Hispanism. As I intend to show in the following sections, this conceptualisation of a Hispanic Mexico comprised two basic dimensions: Mexico as a Spanish offshoot and Mexico as a Catholic community. Although closely interrelated, each of these dimensions points to a distinct feature of the conservative idea of the nation and deserves, therefore, separate attention.

2.4.1 The Spanish origins

"We are the offspring [...] of those who, under the venerated cry of *Patria*, Religion and King, three things that are linked to liberty, have undertaken all enterprises and

[76] O'Gorman, *La supervivencia política novohispana...*, p.68.

faced constantly and fearlessly, all sacrifices."[77] These words that José Manuel Gutiérrez Estrada used before Maximilian to describe the courage and determination of the Mexican people express –much more accurately than any notion of resolve—the pride with which most Mexican conservatives conceived of their Spanish origins, and, by extension, of the genesis of the Mexican nation. This pride, I would like to argue, derived from the conservatives' conviction that in belonging to the Hispanic world, they partook of an elevated culture based on a morally high project.

Edmundo O'Gorman has explored this matter extensively.[78] In his account, the roots of the conservative conceptualisation of Mexico in terms of its Spanish heritage can be found in the self-definition as Iberian to which New Spanish *criollos* subscribed. To support his argument, O'Gorman goes back to sixteenth and seventeenth-century Europe and points to the open hostility that existed between the modernising, rationalist English way to conceive the world and the religious, traditionalist Spanish one. He further asserts that these two contending worldviews were condensed in clear projects that, for the first time, faced a possibility of full realisation on virgin soil after the "discovery" of America. However, whereas for the English settlers the goal was to build a renewed (i.e. reformed and improved) Europe in America; for Spain, America provided an opportunity to try to implement the old traditionalist project right from the beginning, free from the reformist contamination which had tarnished it in the old Europe.[79]

According to O'Gorman, it was thus that the Spanish traditionalist project found its way to the American colonies of Spain and that the New Spanish *criollos* came to conceive of themselves as Iberian in terms of their goals, culture and beliefs. It was also thus that they participated in the Spanish project and embraced its traditionalism, absolutism, Catholicism and rejection of modernity.[80] Alongside this self-perception as Iberian –O'Gorman contends—, the *criollos* developed a special pride in the particularities of their place of birth, in the characteristics of their colonial *patria*. Predominantly in response to the discrimination they experienced *vis-à-vis* the

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[77] Gutiérrez Estrada, "Discurso pronunciado en el Palacio de Miramar el 3 de octubre de 1863...", pp.172-173.

[78] O'Gorman, *México, el trauma de su historia,* pp.3-20.

[79] Alberto Filippi has drawn attention to the fact that after the Reformation, "America and its inhabitants were considered as a form of cultural heritage, destined to European Catholicism, insofar as they were conceived as a compensation to the Roman-Catholic faith for all that Lutheranism and Calvinism were taking away from it in the rest of Europe." Filippi, *Dalle Indias all'America Latina: Saggi sulle concezioni politiche delle istituzioni euroamericane*, Camerino, Collana dell'istituto di studi storico-giuridici filosofici e politici, 1999, p.35.

[80] O'Gorman, *México, el trauma de su historia*, p.12,

Peninsular Spaniards, the New Spanish *criollos* resorted to an exaltation of what they thought to be distinctive of New Spain. Hence the repeated praise of the natural beauty of New Spain, the talent of the American Spaniards and the constant allusions to the favour that Divine Providence had bestowed upon New Spain through the apparition of Our Lady of Guadalupe.[81] It was in this way that, according to O'Gorman, the colonial *criollos* added to their pride in belonging to the trunk of Iberian culture –the only one which, in a Europe plagued by the modern heresy, continued to brandish the standard of religious truth—the complacency nurtured by the alleged superiority of their own peculiarities.[82]

As a result of this parallel affirmation of their membership in the Iberian community, on the one hand, and of their American peculiarities, on the other hand, the New Spanish *criollos* reached a balance between their loyalty to Spain and their loyalty to America. This balance rested upon the conceptualisation of the *criollos*' historic being as Iberian, clearly different from the metropolitan Iberian, but ultimately Iberian.[83] In O'Gorman's view, the Mexican conservatives of the 1850s inherited this way to conceive of themselves and therewith the pride in participating in Spain's morally superior project.

O'Gorman's interpretation is certainly alluring, as it links the New Spanish *criollos* with the conservatives of *Reforma* Mexico through a smooth and uninterrupted line of common self-perception. Nonetheless, this reading, while suggestive, is also oversimplified. For if it is true that clear coincidences can be found between New Spanish *criollo* patriotism and the 1850s and 60s conservative idea of the nation, it is

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[81] According to the account that began to circulate in 1648, the Virgin appeared to Indian Juan Diego in December 1531, leaving a painting as testimony of her apparition. While there is evidence that the image of Guadalupe had been venerated in New Spain since 1556 –especially by the indigenous population—it was until 1746 that Our Lady of Guadalupe was acclaimed as the patron of New Spain. The cult of Our Lady of Guadalupe laid the foundations of a sense of election, as, according to the popular interpretation, no other people had been granted the privilege of having been given a token, at once tangible and divine, of the miraculous apparition of the Mother of God herself. This was encapsulated in Pope Benedict XIV's dictum when declaring Our Lady of Guadalupe patron of New Spain: "*non fecit taliter omni nationi*" ("it was not done thus to all nations"). The classical work is Jacques Lafaye, *Quetzalcóatl y Guadalupe*, Mexico City, Fondo de Cultura Económica, 1974. See also: Francisco de la Maza, *El guadalupanismo mexicano*, Mexico City, Fondo de Cultura Económica, 1984 (1st ed. 1953). For the myth of Guadalupe as a cornerstone of Creole patriotism, see: David Brading, *The First America...*, pp.343-361 and Brading, *Prophecy and Myth in Mexican History*, Cambridge, Centre for Latin American Studies, 1984, chapter 1. For the syncretic character of the cult of Our Lady of Guadalupe and the image's worship by the indigenous population, see: Enrique Florescano, "Guadalupe de todos", *Nexos*, v.10 (109), 1987, pp.29-35 and Solange Alberro, *El águila y la cruz. Orígenes de la conciencia criolla. México, siglos XVI-XVII*, El Colegio de México/Fideicomiso Historia de las Américas/Fondo de Cultura Económica, 1999.

[82] O'Gorman, *México, el trauma de su historia*, p.15.

[83] Ibid., p.11.

also undeniable that significant breaks and differences exist between both strands of thought that render it impossible to conceive of them as one and the same thing.

Indeed, a rigorous analysis of Creole patriotism, such as that offered by the works of David Brading and Anthony Pagden,[84] shows that by the end of the eighteenth century, "most of the inhabitants of the Spanish American mainland were conscious that they belonged to communities that, though they still shared a common language, a common religion and much else in addition with Spain, were no longer Spanish".[85] Rooted in the land of America, New Spanish *criollos* saw Spain as their *nación*, a term that indicated a common racial inheritance; however, they also saw the colonial soil as their *patria*, a concept that referred to the place of birth and belonging.[86] The notion of *patria* would soon include cultural elements as well: in their self-definition *vis-à-vis* the Spaniards, the *criollos* would, for instance, pride themselves in being more devout and in speaking the Spanish language more richly and beautifully than the people in the Peninsula.[87] More importantly still–and this is a point on which O'Gorman is conspicuously silent—, New Spanish *criollos* appropriated the mythical pre-Hispanic past and appealed to it, first, to support their claim to the self-government they had been denied and, later, to combat the portrayal of everything American as degenerate, immature and inferior to everything European that, during the Enlightenment, authors like Cornelius de Pauw, William Robertson and Georges-Louis Buffon had begun to spread.[88]

As a matter of fact, from early on the New Spanish *criollos* conceived of New Spain not as colony, but rather as a kingdom of the Spanish Crown.[89] The problem with this conception was, as Pagden has argued, that, in order to be able to claim this status as quasi-autonomous kingdoms, these polities "had to have a continuous, instructive

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[84] David Brading, *Los orígenes del nacionalismo mexicano* (2nd ed.), Mexico City, Era, 1988 (1st ed. 1973) and Brading, *The First America..., passim;* Anthony Pagden, *Spanish Imperialism and the Political Imagination. Studies in European and Spanish-American Social Political Theory 1513-1830*, New Haven and London, Yale University Press, 1990, pp.90ff and Pagden, *The Uncertainties of Empire. Essays in Iberian and Iberoamerican Intellectual History*, Aldershot, Hampshire, Variorum, 1994, ch.XIV.

[85] Pagden, *The Uncertainties of Empire...*, ch.XIV, p.51. See also: Brading, *The First America...*, p.293.

[86] Pagden, *Spanish Imperialism...*, p.99. A 1737 dictionary defines "*nación*" as "1) the act of being born; 2) the collection of the inhabitants of a Province, Country or Kingdom; 3) frequently used to denote a foreigner." "*Patria*", in turn, is defined as "1) the place, city or country in which one has been born; 2) metaphorically, it denotes the place of belonging." *Diccionario de la lengua castellana en que se explica el verdadero sentido de las voces, su naturaleza y calidad, con las phrases o modos de hablar, los proverbios o refranes y otras cosas convenientes al uso de la lengua*, Madrid, Imprenta de la Real Academia Española, 1737, v.IV, p.644 and v.V, p.165.

[87] Pagden, *The Uncertainties of Empire...*, p.84.

[88] For a thorough analysis of the arguments put forth by these authors and their impact on the formation of Creole patriotism, see: Brading, *The First America...*, pp.422-464.

and politically legitimating past".[90] However, the only past the New Spanish *criollos* did not share with Spain was precisely that of the peoples their ancestors had conquered. Thus, despite the difficulty in establishing any credible continuity with those peoples, the *criollos* attempted to draw a line that would connect them with the pre-conquest inhabitants of the viceroyalty, especially with the Aztecs.[91] Since as early as the seventeenth century, therefore, the *criollos* reached for the pre-Hispanic past and used it to legitimate their aspiration to be recognised on an equal footing with the other kingdoms of the Spanish Crown.

Later, in the eighteenth century, the Enlightenment criticism of America and the Americans brought about a strong Creole reaction and renewed attempts to appropriate, on behalf of the *criollos*, the pre-Hispanic past. In this vein, from his Italian exile, Jesuit Francisco Javier Clavijero published in 1770 his *Storia Antica del Messico*, with the aim of "restoring splendour to a truth which has been obscured by an incredible mob of modern writers on America".[92] In his work, Clavijero set out to rescue the Aztec past and to create out of it a classical antiquity which would serve the Mexicans "as the past of Greece and Rome had served the Europeans, as a culture to be shared with the ancient Mexicans [i.e. the Aztecs] with whom they were connected by place, not race."[93]

Like other themes of Creole patriotism, the re-appropriation of the pre-Hispanic past fed into the nationalistic rhetoric of the insurgency.[94] Through the works of Fray Servando Teresa de Mier, an exiled *criollo*, and Carlos María de Bustamante, a *criollo* lawyer who actively participated in the insurgency at José María Morelos' side, emerged a myth of a Mexican nation which was a direct heir to the Aztecs. This myth imprinted the popular movement throughout and provided the basis for declaring independence from Spain as an act of restoration on behalf of a Mexican nation that had existed before the conquest.[95] That the myth of a pre-existing Mexican nation provided a forceful argument to justify independence from Spain is furthermore evidenced by the fact that Iturbide and his *criollo* followers, who eventually attained independence without having participated in the popular insurrection, declared in the

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[89] Pagden, *Spanish Imperialism...*, p.91; see also: Rodríguez, "From Royal Subject...", pp.25-26.
[90] Pagden, ibidem.
[91] One of the first attempts to establish such continuity was made by Carlos de Sigüenza y Góngora in 1681. For an interesting analysis of his convoluted account, see: Brading, *The First America...*, pp.362-372 and Pagden, *The Uncertainties of Empire...*, pp.71ff.
[92] Quoted by Brading, *The First America...*, p.450.
[93] Pagden, *The Uncertainties of Empire...*, p.101.
[94] Brading, *Los orígenes del nacionalismo...*, pp.76ff.

opening paragraph of the Act of Independence: "The Mexican nation, which for three hundred years has neither had its own will nor the free use of its voice, today leaves the oppression in which it has lived."

In the light of the previous discussion, O'Gorman's assertion that the New Spanish *criollos* affirmed themselves as Iberian appears difficult to sustain. Even more problematic is the author's projection of an incomplete picture of Creole patriotism onto the self-definition of mid-nineteenth-century Mexican conservatives. For a fundamental difference existed between both conceptions that can, by no means, be smoothed off. Indeed, whereas the New Spanish *criollos* made important efforts to find the elements on which to found a separate identity from that of the Peninsular Spaniards, the conservatives of the *Reforma* sought to dispense with everything that could render them culturally and ethnically different from the other children of the mother country. In other words, in absolute contrast to the New Spanish *criollos*, the Mexican conservatives presented themselves and the nation to which they belonged as exclusively Hispanic. It was therefore the conservatives and not the *criollos* who –to use O'Gorman's language—affirmed themselves as Iberian.

For the conservatives, in fact, the way in which independence had been gained by Iturbide and his *criollo* followers in 1821 had implied a change in the political status of Mexico *vis-à-vis* the metropolis, but in no way did it entail the recognition that Mexico, as an entity, was culturally different from Spain. Hence the value attributed to Iturbide's feat of attaining independence by only "untying the political links" between Spain and its colony without actually altering the true principles that held New Spanish society together. Hence, also, the choice of Iturbide's figure as the father of Mexican independence. Furthermore, in the conservative view, Mexico was only a grown up child of the mother country that, despite its emancipation from parental tutelage, continued to profess the Catholic values and beliefs that it had absorbed throughout three hundred years of Spanish rule. Thus, in the conservatives' interpretation, political independence had not in the least affected Mexico's Hispanic soul.

Consequently, the Conservative Party, self-proclaimed successor to the 1821 *criollos*,[96] postulated an interpretation that portrayed independent Mexico as being almost a mere continuation of New Spain and, at times, even conflated both entities.

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[95] Brading, *The First America...*, p.581.

[96] Alamán drew attention to the continuity that existed between the Conservative Party that he led and the "Men of the Conservative Party" that had consummated independence. See: "Aniversario del grito de Dolores."

Thence the occurrence of phrases equating Mexico to New Spain in many a conservative writing. For instance, José Manuel Gutiérrez Estrada stated in his letter to President Bustamante: "We have not been governed in any other way [than the monarchy] since the conquest. We did not have a king here, that is true, but did we not have a representative of his? And, more importantly, our legislation, our institutions, our customs, our way of being, was it all not monarchical?"[97] Two decades later, in his speech before Maximilian, Gutiérrez Estrada confirmed that "Mexico expect[ed] much of the institutions that ruled it during three centuries, leaving us, after their disappearance, a splendid legacy that we have been unable to preserve under the democratic republic".[98]

As was said earlier, the identification of the Mexicans with the New Spaniards stemmed from the Hispanic self-definition that the conservatives adopted. Yet, the conservatives' attachment to the Hispanic culture derived its strength from more than a simple adhesion to traditional values. Rather, it had its most potent source in the conviction that this culture was superior to others insofar as it embraced and promoted the values of the true faith of Catholicism. This facet of the conservative idea of the nation is most clearly manifest in the way the conservatives visualised Mexico's relations with the United States.

To be sure, the relationship between Mexico and its northern neighbour had been turbulent since its early days. From the outset, Mexican political elites were aware of the fact that the overwhelming power of the United States represented a threat to the country's security. When their fears became justified in the late 1840's, the consequences were all too grave and painful to ignore. What is interesting here is that while the experience of the war alone would have sufficed to explain why the conservatives rejected the United States so forcefully, the conservatives articulated their repudiation of Mexico's northern neighbour around a discourse of cultural difference, and –even—superiority.

In this interpretation, the revealed superiority of the Hispanic culture was invoked to oppose what the conservatives saw as the United States' "barbarism", incarnated in its "hypocritical espousal of democratic ideals" –of which the expansionistic attack on Mexico had left no doubt—, and significantly, in its

[97] Gutiérrez Estrada, *Carta dirigida al Escmo....*, p.45. Note the use of the pronouns "we" and "our" to denote identification with the New Spaniards.
[98] Gutiérrez Estrada, "Discurso pronunciado en el Palacio de Miramar el 3 de octubre de 1863...", p.170.

Protestantism. It was precisely this ignorance of the absolute truth of Catholicism that rendered the United States morally inferior. And in fact, it was the moral superiority of the Hispanic culture combined with the recognition of the enormous physical power of the United States that the conservatives stressed in their attempts to rally support for their defence of Mexico:

> Our race, strong in its past, strong in its religious, political and warrior traditions, strong even now in its religious faith, in its honour and in the noble character of its aspirations, is weak since its origins if we consider its physical characteristics: the continuous revolutions have weakened it even more. Its mission, however, is great and arduous: it has been called to fight in the New Continent against another race, weak in the moral order, but highly powerful in the physical order. It is therefore necessary to fortify our race, of whose preservation Mexico is the most advanced sentinel.[99]

This extract from *El Partido Conservador en México* is revealing in more than one sense. First, it points to the already explored moral authority of the Hispanic project of which, according to the conservatives, Mexico was repository. Secondly, it speaks of a –non-specifically Mexican—race understood in terms of culture and tradition as opposed to biology or physiognomy. Thirdly, and related to the previous point, in stating that Mexico was the "most advanced sentinel" of this race, it suggested that it was not the only one. Moreover, not only does this passage hint at the likely presence of more sentinels, but also, and more important, at the probable existence of this race beyond the boundaries of Mexico. The implications of these ideas for the conservative idea of the nation are significant and to them I now turn.

As I mentioned in the introduction to this part of the chapter, I argue that the Mexican conservatives had an ethnic idea of the nation. This idea, however, was far from incorporating the peculiarities of Mexican native populations in an attempt to create a new and unique ethnic identity. Instead, the idea of the nation that the conservatives shared conceived of Mexico as a member of the Hispanic cultural trunk. Membership in this exclusive club entailed participation in a project that was deemed to be morally superior because it rested on the values of Catholicism. In conceiving the nation in such terms, the conservatives could not claim, in principle, that Mexico was any different from any of the other Spanish American nations, or, for that matter, from Spain. Thence their willingness to see themselves and Mexico as belonging to the

[99] *El Partido Conservador en México*, p.38.

"Hispanic race", in conjunction with all the other peoples that shared and professed the superior Hispanic values.

To be sure, this Hispanism was far from being a conception unique to the Mexican conservatives. As Romana Falcón has shown, throughout the mid-nineteenth century, "in the Iberian Peninsula, in the Antilles and in the old Spanish America a common notion was that of 'Latin' or 'Hispanic race', [which] was used to designate the collection of Spanish-American peoples that were identified with an ethno-cultural community different to the Anglo-Saxon one and which had its matrix in Spain".[100] The advocates of this idea, which was strongly promoted by Spain itself, claimed that, throughout the centuries, the Spaniards had developed a culture and a way of life, with particular modes, values, traditions and attitudes that made them different to and distinguishable from other peoples. Furthermore, according to this view, when the kings of Castile and their descendants conquered America, they transplanted this way of life to the new continent and transmitted it to the mestizo "races" that were later born there. Thus, for those who endorsed Hispanism, "those people who had been born in the Peninsula and those who had been born in Spanish America belonged to the same race, and were united by the same culture, the same historical experience, a language, a tradition and a religion that bound them as brothers and rendered them children of a common *patria*."[101]

Interestingly enough, although in her work Falcón refers to the nineteenth-century notion of race as "term that denoted precise and hereditary moral and biological characteristics"[102] she refrains from ascribing any biological features to the idea of "Hispanic race" which was at the core of the Hispanism that Mexican conservatives professed. In turn, Falcón settles for a conception of "race" as an ethno-cultural community. And it might well have been the case that it was, in fact, a non-biological conception that the conservatives had mostly in mind when referring to "our race" or "the men of our race."[103] Yet, there is indication that, even if not as a rule, Mexican conservatism had, in fact, racist undertones.

For instance, a 1851 liberal satire of the monarchical-turned-conservative party portrayed the Conservative Party as one whose aim was to form an aristocratic

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[100] Romana Falcón, *Las rasgaduras de la descolonización. Españoles y mexicanos a mediados del siglo XIX*, Mexico City, El Colegio de México, 1996, p.20. For the notion of "Anglo-Saxon race" to which the Mexican conservatives were reacting, see: Reginald Horsman, *Race and Manifest Destiny: The Origins of American Racial Anglo-Saxonism*, Cambridge, Mass., Cambridge University Press, 1981.
[101] Falcón, *Las rasgaduras...*, p.22.
[102] Ibid., p.19.

government in which only white people could participate.[104] While it is evident that this portrait had a political function to fulfil and is therefore exaggerated, it does point to the fact that the conservatives' opponents perceived the Conservative Party as a group whose elitism might flow over to the realm of racism. More compelling, however, is the 1858 appearance in the conservative press of an article that discussed the meaning of *patria*, and, less openly, the nature of the Mexican nation. Published on 16 September, the anniversary of the beginning of the popular movement of independence, the article's main aim was to convince the readers that Europe did not represent a threat to Mexico, but that it was rather the United States from whom Mexico had to defend itself. What is interesting in this case is that in developing his argument, the unidentified author revealed much more about his conception of Mexico in terms of race than about the threat that the United States allegedly posed. The richness of the argument justifies a lengthy citation:

> *Patria* is liberty, order, wealth, civilisation, native soil, organised under the same flag and in the name of the same soil [...]. All of this was brought to us by Europe. That is to say Europe has brought us the notion of order, the science of liberty, the art of wealth, the principles of civilisation. All of this was unknown to the indigenous populations.
> [...] Europe, then, has brought the *patria* to us. If we add that Europe even brought the population that constitutes the personnel and body of the *patria*, all the civilisation on our soil is European. We could define civilised America as Europe established in America.
> [...] To the things, the objects, let us add the people, the men that constitute America today. All its population or the population that represents it is European. The Indian does not figure or count in our political order.
> We, who call ourselves "American" are nothing but Europeans born in America. Our skull, our blood, they both come from a European mould. Our names are European; no distinguished person in our society has an *Otomí* or *Tarasco* name.
> Our language is European; our religion is European. Without Europe, America today would adore the sun the trees, the beasts [...] The European's hand planted the cross of Christ in hitherto gentile America. Blessed be the hand of Europe.
> [...] Thus, what we call independent America is really America-established Europe. Our revolution [of independence] was the dismembering of a European power into two halves that today manage their own affairs.

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[103] "El gran día nacional", *El Universal*, 27 September 1849.
[104] V.C. *Lijera reseña de los partidos, facciones y otros males que agobian a la República Mexicana y particularmente al Distrito Federal, ecrita por [...]*, Mexico City, Imprenta de M.F. Redondas a cargo de Manuel C. Zuleta, 1851, p.5.

> [...] We owe to Europe all goodness we possess; even our race, much better and nobler than the indigenous one, although the poets, who always feed on fables, say the opposite.[105]

Following Alamán's steps, who in 1850 had rejected the "vulgar error" current in 1821 that portrayed independence as a resurgence of the pre-conquest nation of Anáhuac after three centuries of Spanish oppression,[106] the author of this article repelled the pre-Hispanic past as significant for (his) contemporary Mexico. In his stating the European character of Mexico, however, he went farther than most of his fellow conservatives and not only claimed that Mexico was culturally European, but also genetically so.

Mexico as Europe transplanted in America, Mexico as a culturally Hispanic nation, Mexico as a Catholic community, Mexicans as racially European/Spanish, this article in *Diario de Avisos* encapsulates the conservative idea of the nation with accomplished clarity. And yet, not everything is as clear as it appears. For, the conservatives, as any other group with a particular view of the nation, had to reconcile the disparate elements of a society that did not conform to their ideal of a Hispanic Mexico. Significantly, with regard to the reality of a large indigenous population, many conservatives took pains in trying to accommodate the existence of the Indians within the framework of their Hispanic nation. Their solution was much determined by their elitism.

As Lourdes Quintanilla has shown, in the case of Lucas Alamán the answer came through the differentiation of two distinct notions: nation and *pueblo* (people). In this appreciation the nation was depicted as the active creator of history, whereas the *pueblo* appeared to be, in turn, the inert matter of history, never its actor. While the nation, comprising only the notables, was in charge of directing social preservation and change, the *pueblo*, comprising the majority, worked, trusted its leaders and believed in the future, which appeared before it as both promised and promising.[107]

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[105] "Aniversario patriótico", *Diario de Avisos*, 16 September 1858.

[106] See: Hale, *Mexican Liberalism...*, p.21.

[107] Quintanilla Obregón, "El nacionalismo de Lucas Alamán", pp.379-380. This way to understand "nation" and "*pueblo*" was common in the second half of the nineteenth century. As a 1878 dictionary states: "The nation is the body of citizens, the *pueblo* is the reunion of the peasants" ("*La nación es el cuerpo de los ciudadanos, el pueblo es la reunión de los agrícolas*"). Pedro María de Olive, *Diccionario de Sinónimos* in *Novísimo diccionario de la lengua castellana, que comprende la última edición íntegra del publicado por la Academia Española y cerca de cien mil voces, acepciones, frases y locuciones añadidas por una sociedad de literatos aumentado con un suplemento de voces de ciencias, artes y oficios, comercio, industria, etc. etc. y seguido del Diccionario de Sinónimos de D. Pedro M. de Olive y del Diccionario de la Rima de D. Juan Peñalvier*, Paris, Librería de Garnier Hermanos, 1878, p.171.

Thus, the conservatives excluded the masses, most of whom were Indians and mestizos, from their conception of the nation. The fact is that when they spoke about the Mexican nation, what the conservatives envisaged was a select group of men of Spanish descent that were entitled to run the affairs of the country. Clearly, this conception did not provide them with any basis upon which they could mobilise the population in support of their political project. And yet, when the time came, the conservatives did succeed in raising a significant popular following who responded to their calls to defend the nation.[108] They managed to do so by appealing to the Mexicans' faith and love of the Catholic religion, the other constitutive part of the conservatives' Mexican nation.

2.4.2 The Catholic community

If Catholicism and the moral superiority that was attributed to it played a fundamental role in the conservatives' definition of the Mexican nation as a branch of the Hispanic trunk, and, therefore, as different from and morally superior to its Protestant Anglo-Saxon neighbour, it was no less important for the definition of the nation in internal terms. This is evidenced in statements such as that made in 1855 by the author of *El Partido Conservador en México*: "We will issue a sole warning: The only thing that revolutions have left standing among us is the religious principle, once this has been destroyed, the only tie that exists today in Mexico will be broken."[109] These words clearly echoed the concern that Lucas Alamán had expressed since the late 1840's and, in a way, summarised the view most conservatives maintained regarding the power of Catholicism as an agglutinating force. For from the conservatives' viewpoint, Catholicism not only contributed to the cohesion of the Mexican nation, but was the determinant force behind it.

A very pragmatic interpretation of Mexican society was at the centre of the conservative argument. Following the observation of what they deemed to be Mexican reality, the conservatives were convinced that in Mexico, a country that was characterised by regional diversity, colossal economic and social differences and bitter internal discord, the only element that allowed for a certain identity to exist among the whole of the population was Catholicism. Moreover, in their view, Catholicism not

[108] Brian Hamnett has recently explored the popular bases of Mexican conservatism in his "El partido conservador en México...", in Fowler and Morales Moreno, *El conservadurismo mexicano...*, pp.213-237.
[109] *El Partido Conservador en México*, p.38.

only made possible the emergence of a common identity, but also fostered unity among all Mexicans.[110]

An analysis of conservative writings reveals, however, that there was yet another way in which the conservatives conceived the role of Catholicism in the constitution of the Mexican nation. This view, which complemented rather than substituted the approach which held Catholicism as a source of unity, portrayed Catholicism as the true spirit of the Mexican nation. This interpretation was closely intertwined with the identification of the Spanish conquest as the point of origin of the Mexican nation, which, as was mentioned earlier, propounded that Mexico was born as a nation only after Catholicism was brought to the formerly idolatrous peoples that inhabited the current Mexican territory.[111] The birth of Mexico appeared therefore to be, in essence, a religious event in which a Catholic community had come into being. Hence assertions such as: "[Mexico was] formed by religion, civilised by religion, united [to Spain] or independent [from it] in 1821 for the sake of [the] preservation [of religion]".[112]

This manner of visualising Mexico has two interesting implications that have already been touched upon if only briefly. The first regards the above-mentioned essential character that the conservatives attributed to Catholicism in their idea of the nation. The second, in turn, points to the assumed continuity between New Spain and independent Mexico. As was mentioned above, for the conservatives, independence as attained in 1821 had not been brought about by the birth of a new nation, nor had it even constituted an interruption in the continuous existence of the Mexican/Hispanic nation as they defined it. Independence had meant, above all, a change of rule within a society that continued to be, as its had been for three centuries, a Catholic community. The fact that the Plan of Iguala had proclaimed Catholic religion as the first guarantee of independent Mexico only seemed to confirm, in the conservatives' perspective, that

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[110] On the use of religious metaphors in the patriotic discourse to induce a sense of unity in the period prior to the *Reforma* see Brian Connaughton's interesting work: "Conjuring the Body Politic from the Corpus Mysticum: The Post-Independent Pursuit of Public Opinion in Mexico, 1821-1854", *The Americas*, 55 (3), 1999, pp.459-479.

[111] Patricia Galeana seems to endorse this view when she asserts that "the fact that westernisation of Mexico took place through Catholicism rendered this religion constitutive of the national being." See: Patricia Galeana de Valadés, "Los liberales y la Iglesia", in Jaime E. Rodríguez, *The Mexican and Mexican American Experience in the 19th Century*. Tempe, Arizona, Bilingual Press/Editorial Bilingüe, 1989, p.45.

[112] José Ma. Espinosa y Mora [*et al.*], *Representación al Soberano Congreso contra el artículo 15 del proyecto de Constitución sobre tolerancia religiosa*, Mexico City, Imprenta de Andrade y Escalante, 1856. Among the signatories of this document were conservatives José Joaquín Pesado, Bernardo Couto and Octaviano Muñoz Ledo.

the "educated men" who consummated independence under Iturbide's leadership knew and understood the true nature of the nation.

Against this backdrop it is not difficult to see why the Liberal Party's reformist policies, with their emphasis in curbing corporate privileges and secularising society, were interpreted and publicised by the conservatives as overt attacks on the Catholic religion and, therefore, on the foundations of Mexican nationality itself. Thus, in 1858, for instance, shortly after ousting Ignacio Comonfort from the presidency, the new conservative administration issued a document that stated:

> To a plan that destroys everything [*i.e.* the 1857 constitution], the government will oppose a plan that preserves everything and will, in turn, ask whether that which is called "progress and reform" and that has soaked our soil with blood and tears must prevail over the sentiments that the nation has always manifested under the banner of independence.[113]

There can be little doubt that in referring to the "sentiments that the nation has always manifested" the author of this manifesto had Catholicism in mind; and, in order to reinforce the conservative defence of religion on the grounds of its importance for Mexican nationality, he added: "Will the fire that the liberator lit not revive among the children of the *patria*, the fire that he lit as he proclaimed that the first goodness of Mexico was the Catholic religion, and that with it we would live united and that it would be the indestructible foundation of our independence?"[114]

The conviction that Catholicism was the most important component of Mexican nationality did not recede after the conservative defeat in the Three Years War. Moreover, it increased its presence and continued to be one of the cornerstones of the critique that the conservatives made of Juárez's liberal policies. The words of Luis G. Cuevas, minister of foreign relations during the conservative administration, provide a vivid example of this:

> What has been done during the past five years [since 1856], what is being done now, the reform, in sum, [...] is not favourable to either the diverse constitutions we have had, or to the political systems that have been adopted [in the past], or to our traditions of government, or to the religious feelings represented in our flag as the most illustrious trophy of our

[113] *El Gobierno Supremo de la República a los Mexicanos*, Mexico, Imprenta de Andrade y Escalante, 1858, p.6. Justo Sierra attributes the authorship of this manifesto to Ignacio Elguero, "a perfect gentleman and jurist." See: Justo Sierra, *Juárez; su obra y su tiempo*, Mexico City, Editora Nacional, 1965, p.106.
[114] Ibid.

> nationality. All what we see is new [...] and capable of exciting a strong opposition among the most tranquil and submissive souls. These are palpable facts, and if the established powers feel the obligation to [...] punish those who rise against them, they must at least agree that, before victory, their title [of authority] could not but meet with tenacious resistance supported by the two most respected things on earth: customs and religious conscience. What could be said of the current national government if, with its conduct, it sought to demonstrate that everything deserves indulgence except the defence of what has, until now, been our moral being and formed our society?"[115]

As has already been said, the Conservative Party's hopes of seeing religion vindicated and its importance for Mexican nationality recognised were not fulfilled by either European intervention or the longed-for Catholic monarchy. To the secularising measures decreed by both the French occupation forces and Maximilan the conservatives responded by openly expressing their disgust and stressing that, by undermining Catholic religion, the secularising legislation had put at risk "the nation's social constitution."[116] Moreover, some conservatives feared that the ultimate consequence of the adoption of the *Reforma* principles by Maximilan would be the total ruin of Mexico:

> [The] consequences [of this matter might be] so fatal that they could have as their last result the ruin of this unfortunate nation, which has fought with such tenacity against its oppressors and tyrants, only to sustain the religion it professes, and which would rather let itself be torn into pieces than abandon its religion. No, the nation will never consent to anything that will bring it apart or deviate it from its religious beliefs.[117]

The defeat of the Second Empire in 1867 brought to an abrupt end the possibilities of realisation of the conservative project through state-channels. The conservatives had been unable to save the Mexican nation from the threat represented by the undermining of its fundamental basis. And yet, after the victory of the secularisation project, Mexico

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[115] Luis G. Cuevas, "Esposición que dirige al Tribunal Superior del Distrito Federal [...] sobre su conducta oficial como ministro de relaciones del gobierno establecido en la capital en enero de 1858." In: *Proceso instruido a los Ex-Ministros...*, p.210.

[116] El Supremo Tribunal de Justicia a la Regencia del Imperio, December, 1863, in "Documentos relativos a la reforma y a la intervención francesa en México (1851-1910)", 81 (6), *Benson Latin American Collection*, General Libraries, University of Texas at Austin. Hereafter cited as *BLAC.*

[117] Ignacio Sepúlveda a Teodosio Lares, 12 November 1863, Teodosio Lares Collection, 86 (6) *BLAC.* For the Church protest against the secularising measures adopted by the French occupation administration, see: Pelagio A.Labastida [*et al.*], *Solemne protesta que el episcopado mexicano presentó ante D. Juan N. Almonte y D. José M. Salas, llamados regentes del Imperio contra los actos de la intervención francesa*, Colima, Tipografía de L. Orosco, 1864.

did not disintegrate, nor was it ultimately absorbed by the United States. However, for some of the defenders of the idea of a Catholic Mexico, the result of the victory of the liberal project had been just as negative: Mexico could probably be said to exist in a physical way, but it had undoubtedly lost its soul.[118]

2.5 Final considerations

The conservative idea of the Mexican nation was, to a great extent, a reflection of the more general features of conservatism as a political tendency: it was based on tradition, defended Catholic religion and the Church, and was permeated with the elitism that was predominant in the conservative creed. However, it is undeniable that these general characteristics of conservatism acquired a distinctive shape when incorporated into the idea of the nation. This shape resulted from a very particular understanding of Mexico's past and from a clear project for Mexico's future.

Faced with external threat and internal anarchy, the conservatives looked to the past in their search for guidance. The obvious period to turn to was the colonial era, for it was then that Mexico –or its antecedent, in any case—had been stable, peaceful and rich. The tradition, corporatism and centralism that had made New Spain strong appeared then to be the answer to Mexico's problems. If Mexico could be made to rest on these pillars again, it could certainly recover the grandeur that had once characterised it. Underpinning this conviction was the no less strong belief that independent Mexico continued –at least in an ethnic sense—New Spain. In the conservatives' view, the change of name and the change of rule had had no impact whatsoever in the composition of the actual nation which, for them, remained first and foremost Hispanic.

The conservatives had an ethnic conception of the nation in that they saw the Mexican nation as a community of descent bound by culture, religion and a generally non-biological conception of race. This visualisation of the nation portrayed Mexico as being morally superior to non-Hispanic peoples, Catholic in terms of its essence and fundamental unity and Hispanic in terms of race. It was these features that the

[118] "Catholic Mexico, although without national independence, was more national and independent than today, because it had a healthy soul in a healthy body, a Christian spirit animated by a robust constitution; but Mexico seduced by the ever growing prosperity of the United States [...] has taken away the life of the social body that its classes composed." J. Ramón Arzac, *México no vivirá sin el*

conservatives struggled to preserve and defend from both the foreign and the internal enemy.

In defending the nation, the conservatives were in fact fighting to preserve a system of beliefs and values that they treasured as constituting the core of the national being; however, this view was hardly concerned with the issue of sovereignty. As became especially evident after the liberal victory in the War of Reform, the defence of the "Mexican nationality" meant, in short, protecting Hispanic culture and above all else, Catholic religion from the attack of modernity. If this could ultimately be achieved by resorting to a foreign power and by calling a non-Mexican to rule the country, so be it. For, clearly, safeguarding Mexican nationality even under a foreign ruler was preferable to clinging to a contested sovereignty that could only conduce to the denationalisation of Mexico.

The conservative idea of the nation articulated around the notion of Hispanism was elitist and exclusive. For the conservatives, the nation was constituted by the white, "thinking men" of society, in other words, by themselves alone. This left out of the picture most of the population, the *pueblo*, who were neither educated nor white. The conservatives could not, however, ignore the reality of the great majority of the Mexicans and, in an attempt to reconcile their view of the nation with the actual features of the Mexican people, turned to Catholicism and identified in it the common binding element. Thus, Indians and mestizos were considered members of the national community in their capacity as Catholics. This kind of response raises the question whether there was anything particularly Mexican about the conservative idea of the Mexican nation.

A tentative answer would be "yes". Although inscribed within the framework of the Hispanic culture-*cum*-nationality, the conservative idea of the nation envisaged the preservation of the Hispanic values inside the particular boundaries of independent Mexico, the soil to which the conservatives were attached by virtue of birth, emotion and economic interest. The defence of the "Mexican nationality", as the conservatives often called it, referred above all else, to the safekeeping of a system of beliefs, values and interests within the territory of what they accepted to be their country. Moreover, in proposing their centralist, traditionalist, monarchical project, the conservatives envisioned the creation of a powerful and wealthy nation equal to any in Europe; thence

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catolicismo, o sean consideraciones sobre el porvenir de las razas que ahora lo habitan, Colima, Tipografía "La Sociedad Católica", 1874, p. 40.

their absolute rejection of federalism, the imported model of localism and disunity, that hampered the rise of a strong and united Mexico.

Yet, it is important to keep in mind that in formulating –consciously or not—an idea of the nation, the conservatives, like any other group in those circumstances, had a vast array of elements from which to choose. They selected those elements that were more compatible with their understanding of the past, and more importantly, with their vision of a Mexico partaking of European civilisation. This does not mean however that full congruence should be expected. David Brading has said of Mexican nationalism in its first phase, i.e. the independence movement, that it was contradictory and ambiguous.[119] The same could be said about mid-nineteenth century conservative nationalism.

[119] David Brading, *Los orígenes del nacionalismo...*, p.82.

CHAPTER 3

A REPUBLIC ROOTED IN THE PAST: THE LIBERAL IDEA OF THE NATION

Mexican official historiography has often portrayed the struggle of Liberal Party, first, against the conservatives and, later, against the interventionist forces as a nationalist struggle. Two factors have contributed to this. On the one hand, as will be seen throughout the following pages, the liberals themselves presented their combat against the conservatives and the French and imperial forces as wars of the nation itself.[1] On the other hand, at the end of the day, the liberals were the victors of this struggle and could therefore write the official history and stamp it with their views.

Whereas the extent of the *Reforma* liberals' "nationalism" has been debated in the literature,[2] the content of their idea of the nation has received less attention. This chapter focuses on this area and investigates the components of the idea of the nation that the *Reforma* liberals upheld. Based on the ethnic-civic typology presented in chapter two, I propose that the liberal idea was predominantly civic, but contained an important ethnic element. For indeed, while the liberal formulation conceived of the Mexican nation as a community of citizens and emphasised its institutional and legal framework, it also traced the origins of the nation back to the pre-Hispanic past.

The first part of this chapter inquires into the characteristics of liberalism in Mexico. This is followed by an examination of the Liberal Party of the *Reforma* period and its programme. The third part of the chapter explores the liberal idea of the nation and identifies its main elements. The emphasis both on institutions and the law, as well as the focus on the role of the "people" receive detailed attention as components of a basically civic notion of the nation. This is complemented by the analysis of the inclusion and re-appropriation of the Aztec past as an ethnic element in the liberals'

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[1] For the nation-building character of nineteenth-century wars in Mexico, see: Fernando Escalante Gonzalbo, "Los crímenes de la Patria. Las guerras de construcción nacional en México (siglo XIX)", *Metapolítica*, 2 (5), 1998, pp.19-38.

[2] See i.a.: Jesús Reyes Heroles, *El liberalismo mexicano* (3rd ed.), 3 vols., Mexico City, FCE, 1988 (1st ed. 1957); Richard N. Sinkin. *The Mexican Reform, 1855-1876. A Study in Nation-Building*. Austin, Institute of Latin American Studies, University of Texas Press, 1979; Hamnett, *Juárez*, London, Longman, 1994 and David Brading, "El patriotismo liberal y la Reforma mexicana" in Cecilia Noriega Elío (coord.), *VIII coloquio de antropología e historia regionales: El nacionalismo en México*. Zamora, El Colegio de Michoacán, 1992, pp.179-204.

formulation of the Mexican nation. Finally, the chapter recapitulates the main issues discussed and advances some thoughts on the significance of the liberal victory for the idea of the nation that the elites of the Restored Republic sought to propagate after 1867.

3.1 Liberalism in Mexico: An overview

Much of the existing literature on nineteenth-century Mexican politics has explored the issue of liberalism and its importance in shaping the institutions and political system that emerged in Mexico after independence. In such literature a common subject of debate has been the extent to which liberalism took root in a society so dissimilar to the European ones from which liberal thought originally sprang. While some authors have argued that Mexico was little less than born liberal,[3] others have claimed that liberalism was, in fact, a creed alien to the realities of Spanish America and, therefore, destined to fail when transplanted from the old continent to the American colonies of Spain.[4] Whether liberalism found fertile ground in Spanish America and, by extension, in Mexico, or whether it was subverted by the negotiation with and accommodation of cultural, social and political elements of the Spanish American post-colonial reality remains a matter of discussion. By contrast, what seems to be a widely accepted view is that beyond the disposition of Mexican soil to liberalism, liberal ideas inspired a significant segment of the political elite since the early days of the independence movement.[5]

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[3] Reyes Heroles, *El liberalismo mexicano.*

[4] See i.a.: Richard Morse, "The Heritage of Latin America" in Louis Hartz (ed.), *The Founding of New Societies; Studies in the Histories of the United States, Latin America, South Africa, Canada and Australia*, New York, Harcourt, Brace and World, 1964; *Soundings of the New World; Culture and Ideology in the Americas*, Baltimore, Johns Hopkins University Press, 1989; Enrique Montalvo Ortega, "Liberalismo y libertad de los antiguos en México del siglo XIX y los orígenes del autoritarismo mexicano" in Enrique Montalvo Ortega (coord.) *El águila bifronte. Poder y liberalismo en México*, Mexico City, INAH, 1995.

[5] An illuminating analysis of the New Spanish context and its reception of Spanish liberalism from the Bourbon reforms to the Cadiz Constitution is presented by Josefina Zoraida Vázquez in "Liberales y conservadores en México: diferencias y similitudes", *Estudios Interdisciplinarios de América Latina y el Caribe*, 8 (1), 1997, pp. 19-39. Roberto Breña, in turn, emphasises that liberalism was much less accepted than is often thought and highlights the anti-liberal character of the movement that led to the consummation of Mexico's independence. Yet, he does concede that: "an array of liberal principles was displayed in the proposals that the New Spanish *criollo* political and intellectual leaders made throughout the emancipating process." Roberto S. Breña, "La consumación de la independencia de México. Dónde quedó el liberalismo? Historia y pensamiento político", *Revista Internacional de Filosofía Política*, 16, 2000, p. 76.

To be sure, from the early 1820s and until the war with the United States, the contending Mexican political elites shared many of their intellectual sources, among which dominated the works of Spanish liberals like Melchor Gaspar de Jovellanos and French thinkers such as Benjamin Constant.[6] Furthermore, the fact that the different political factions found inspiration in common sources often resulted in coincidences over principles and policy issues, of which the staunch defence of private property, trademark of liberalism, is a conspicuous example. Thus, it can be argued that until the late 1840s there existed, in fact, a basic consensus about the liberal values among the Mexican political elites.[7] Prior to the *Reforma*, it was from the opposition between centralism and federalism, and not from the tension between liberalism and conservatism that the main differences between the contending political factions in Mexico ultimately stemmed.

Although during the first ten years of independent life the main preoccupation of Mexican liberals was the formulation and adoption of a written constitution that would "guarantee individual liberty and limit central authority by legal precepts",[8] issues such as representation, the form of government, the rights of the Mexicans, equality before the law, secularisation of society and Church property, were also very much present at the core of the political debate. The first Mexican constitution appeared in 1824 as a product of this debate. Modeled after the United States constitution, but deriving its spirit from Spanish and French liberal thought, the 1824 fundamental law adopted the federal system, established separation of powers and proclaimed the existence of inalienable natural rights. Yet, it also left the special jurisdiction of the corporations, *i.e.* army, Indian *pueblos* and Church, intact and declared Catholicism to be the official and exclusive religion of the nation.

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[6] The common sources of inspiration of Mexican elites prior to 1846 are analysed in Charles A. Hale, *Mexican Liberalism in the Age of Mora, 1821-1853*, New Haven and London, Yale University Press, 1968. Jesús Reyes Heroles also inquires into the ideological roots of early Mexican liberalism in *El liberalismo mexicano*; François Xavier Guerra draws particular attention to the Spanish sources of Mexican liberalism, *Le Mexique. De l'ancien régime à la Révolution*, 2 vols., Paris, L'Harmattan/ Publications de la Sorbonne, 1985.

[7] David Brading has even argued that from 1822 to 1855 liberalism was "the dominant creed of the political nation", the only "true divisions in Mexican politics [being the ones] between the different factions of liberalism." In: "Creole Nationalism and Mexican Liberalism", *Journal of Interamerican Studies and World Affairs*, 15 (2), 1975, p.145. This evaluation is confirmed by William Fowler and Humberto Morales Moreno, who assert that "Mexican conservatism during the first half of [the nineteenth] century was, above all, a liberal conservatism." William Fowler and Humberto Morales Moreno, "Introducción: una (re)definición del conservadurismo mexicano del siglo diecinueve" in William Fowler and Humberto Morales Moreno (coords.). *El conservadurismo mexicano en el siglo XIX*. Puebla, Universidad Autónoma de Puebla, 1999, p.23.

[8] Charles A. Hale, "The Reconstruction of Nineteenth-Century Politics in Spanish America: A Case for the History of Ideas", *Latin American Research Review*, 8, 1973, pp.53-73.

By the early 1830s a reformist wave swept across Mexico. Led in its intellectual ranks by José María Luis Mora and Lorenzo de Zavala, and on the political front by Vice-President Valentín Gómez Farías, the liberal reformers set out to transform Mexico into "a nation of small owners, farmers and craftsmen".[9] In the liberals' eyes, for the fulfillment of this Jeffersonian dream to be possible, it was necessary to free individuals from the traditional ties that bound them to communities and corporations, as well as to break the system of enormous landholdings concentrated in a few hands that both hacienda and Church ownership constituted. Faced with the dilemma that would haunt them repeatedly in times to come, the liberals were forced to choose between their espousal of the non-intervention principle and their firm individualism. Not without difficulty, the liberals favoured state intervention over *laissez-faire* and embarked on a process of undermining the power of the corporations, especially the Church. Hence, in 1833 legislation curtailing the monopoly of the Church in education, suppressing religious orders and commanding the disentailment of Church property was enacted.

Certainly, these measures were intended to parcel out land and to increase the number of small landowners; however, they also pursued additional goals that went beyond the mere modification of the land-tenure regime. On the one hand, there was a strong belief that selling Church property held in mortmain would provide enough resources to solve the ever-present financial problems of the Mexican state. On the other hand, and perhaps more important, the measures aimed to confine the role of the Church to the spiritual sphere, a step deemed essential to the consolidation of the Mexican state. In fact, according to Mora, the preservation of corporate privileges in the 1824 constitution had turned out to be the main obstacle in the construction of a strong national state. In his view, a choice had to be made between the federal representative system established by the constitution and the old regime based on *esprit de corps*. If the state were to prevail, the former had to be chosen, for within the old regime, people identified with smaller corporate units rather that with the nation, thus preventing the surge of any kind of "national spirit".[10]

The 1833 reformist attempt met with virulent opposition and ultimately failed. It would not be until 1847 when, in the midst of the North American invasion, Gómez Farías, vice-president once more, would renew his attempts to reduce the power of the

[9] Brading, "Creole Nationalism...", p.146 and *Los orígenes del nacionalismo mexicano* (2nd ed.), Mexico City, Era, 1988, p.101.
[10] Hale, *Mexican Liberalism in the Age...*, pp.113-114.

Catholic Church. In an effort to obtain funds for military defence, Gómez Farías issued a decree expropriating Church property. Far from accomplishing its purpose, the measure provoked a violent reaction and the Church's funding of the Polko rebellion, a Mexico City-based movement that defied the government and thereby contributed to the ultimate defeat of the Mexican army by the United States. These events would make a long-lasting impression on the liberal memory: thenceforth, the Catholic Church would be marked with the stigma of treason.

As was mentioned in the previous chapter, the war with the United States was a watershed in the Mexican political struggle. The ignominious defeat and the ensuing loss of territory triggered a process of discussion and reflection from which the two well-delineated factions of conservatives and liberals emerged. Furnished with different programmes for the future and alternative interpretations of the past, these two groups would dominate the two following decades of Mexican political life.

In absolute contrast to the conservative evaluation of the country's past, the pre-*Reforma* liberals rejected and condemned the Spanish conquest as despotic and fanatic. Nonetheless, they also disdained the pre-Hispanic past, which they considered to be an epoch of barbarity.[11] When the pre-*Reforma* liberals searched for the origin of the Mexican nation, they turned their sights instead to the attainment of independence. Yet, they were far from believing that the independence war itself had been anything like a golden age: especially during Mora's time, the violence and destruction that had characterised the movement before 1821 appeared as nothing but deplorable. This would have to change, however, after Lucas Alamán publicly condemned the insurgency for being an anarchical uprising of the mob.[12]

To Alamán's claims that Iturbide had been the true and only hero of independence, while Hidalgo had only led the populace in a campaign of plunder and pillage, liberals like Guillermo Prieto, Ponciano Arriaga and Lorenzo de Zavala reacted by making an energetic protest in congress. They further accused the newspaper *El Universal*, where Alamán's editorial had been published, of abusing the freedom of the press.[13] Moreover, in reply to Alamán's article a pamphlet was soon issued with the aim of defending the first insurgents' reputation and of reiterating the hitherto dominant view that both 1810 and 1821 had been phases of an integral movement. After presenting documentary evidence to prove that Hidalgo's goal had been to attain

[11]Sinkin. *The Mexican Reform...*, p.24; Brading, "Creole Nationalism...", pp.150-151.
[12] See the discussion on Alamán's interpretation of the independence movement in chapter two.
[13] See *El Universal*, 19 September 1849.

independence, that the movement he had led had had higher aims than rapine and that the "illustrious men of the country" had indeed welcomed the revolution, the authors of the pamphlet concluded:

> We hope that what has been said will suffice to settle the facts, to vindicate the memory of our heroes and to ensure that the impolitic [*sic*] distinction between the patriots of 1810 and of 1821 will never arise again; [for this distinction is an] element of discord, which had fortunately been forgotten, [...] and that has been the first origin of the evils that have afflicted the *patria* and led her to the sad state in which she currently is [...].[14]

Evident in this line of argumentation is an awareness of the divisive potential –all too clearly fulfilled in the past—of the contending interpretations. Hence the call to unity with which the authors finished their "refutation":

> Let us forget the irritating names with which we have marked each other; let us put aside our political hatred for the sake of the *patria*; let us unite around the national flag and, taking into account that our nationality is imminently threatened by cunning and ambitious enemies, let us gather all our efforts to save that Independence bought with the blood and sacrifices of so many and so illustrious victims.[15]

Thus, prior to the *Reforma*, the liberals deliberately avoided making the choice between the popular and the *criollo* phases of the independence movement. Charles Hale has lucidly explored the reasons for such evasion. He asserts that Alamán's challenge "hit at the liberals' most vulnerable point, [namely] the social basis of their liberalism".[16] For, despite their rhetorical espousal of equality, when confronted with a stirring of the popular/Indian masses, be it in 1810 or in the contemporary caste wars, the liberals retreated from egalitarianism. Yet, they advocated an idea of meritocracy, of an "aristocracy of talent", which in fact excluded two thirds of the Mexican population.

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[14] Juan N. Almonte, Anastasio Zerecero, Mariano Domínguez and José M. Franco, *Refutación en la parte histórica del artículo de fondo publicado en el número 305 del periódico titulado El Universal, el 16 del pasado septiembre; por una comisión de la Junta Cívica de México*. Mexico City, Imprenta de Ignacio Cumplido, 1849, p.15. José María Lafragua attributed this article to Anastasio Zerecero; however it is also interesting to note Almonte's co-authorship of this article, which predates his break with the liberal camp.

[15] Almonte [*et al.*], *Refutación en la parte histórica...*, p.15.

[16] Hale, *Mexican Liberalism...*, p.38.

Like their European counterparts, the Mexican liberals of the pre-*Reforma* had no answers to the "social question".[17]

While the liberals' interpretation of the country's past found a point of departure in independence, it forcefully rejected the three centuries of colonial rule as backward and obscure. Not surprisingly, then, their diagnosis of Mexico's situation in the wake of the military defeat went hand in hand with their repudiation of the colonial structures that Mexico had inherited. Such structures, they argued, had caused and preserved acute socio-economic divisions, which ultimately accounted for Mexico's weakness and the consequent impossibility of organising an effective defence. The fact that the United States army had encountered little –if any—resistance, led some liberal intellectuals to lament that "in Mexico that which [was] called national spirit [could not] nor ha[d] been able to exist, for there [was] no nation".[18]

In the liberals' view, it was therefore necessary to create the nation. This required getting rid of "the adverse forces, which presented obstacles to progress".[19] It also entailed eradicating the colonial mentality to which Mexico was tied, by freeing individuals from the chains that bound them under the Spanish system. Paramount among these chains was, according to the liberals, the attachment to the corporations which prevented the emergence of any sense of national allegiance. The elements of a liberal project began to unfold more clearly. To the attacks of the monarchical conservatives the liberals responded with a passionate defence of the federal republic. Plans to colonise the hitherto uninhabited territory of the country with (Protestant) European immigrants who would prevent further territorial advances by the United States and instil in the Mexicans the ethic of work and the desire for self-improvement were discussed. The project of adopting the toleration of cults as a way to stimulate the desired immigration was put forward thus sparking the fierce opposition of the Church and significant political mobilisation.[20] But the deepest antagonism between the liberals

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[17] For the similarities between Mexican –and, more generally, Latin American—early liberalism and European liberalism on the issue of popular participation, see: Gabriel L. Negretto and José Antonio Aguilar Rivera, "Rethinking the Legacy of the Liberal State in Latin America: The Cases of Argentina (1853-1916) and Mexico (1857-1910)", *Journal of Latin American Studies*, 32, 2000, p.369.

[18] Mariano Otero, *Consideraciones sobre la situación política y social de la República Mexicana en el año 1847*, Mexico City, 1848, p.42.

[19] Guerra, *Le Mexique...*, v.1, p.189.

[20] Previous mobilisation against the toleration of cults had taken place in 1831 in response to a pamphlet published by Vicente Rocafuerte. In 1848, however, the Directorate of Colonisation and Industry presented a draft on an initiative to accept the toleration of cults in the Republic. Petitions and "representations", many of which were written by clergymen, from all corners of the country flowed to the national congress requesting that toleration be rejected. Examples of such documents can be found in *LAF* 539 and 540.

and the religious establishment would stem, as it had done in the past, from the proposals to reduce the power of the Church, the institution that, in their view, embodied all the worst elements of the colonial heritage. In the late 1840s, however, the liberal programme was basically limited to curtailing the influence of the Church by dissolving its corporate entailed wealth. In trying to do so, the liberals intended to free individual property holders from the control of the Church and thus transfer their loyalty to the nation.[21]

A similar motivation was behind the proposed attack on the *ejido*, the system of Indian community property. A legacy of colonial times, when the indigenous peoples enjoyed special rights and status, "the *ejido* had become an encysted institution outside the control of the nation-state; [a]nd like the Church, it had removed large numbers of individuals from direct contact with the state, thereby making them more loyal to their local community than to the nation".[22] For the liberals it was therefore necessary to break the ties of the Indians with these communities, in order for them to become first, individuals and, ultimately, citizens.

It was precisely this idea of turning the Indians into citizens which drove most liberals to adopt a legalistic view *vis-à-vis* the indigenous populations. Indeed, doctrinaire efforts were made to eliminate the appellative "Indian" from the Mexican vocabulary and to merge, albeit conceptually, the hitherto marginalised indigenous populations with the rest of the no less fictitious citizenry. By dispensing with the denomination "Indian" the liberals effectively cast a shadow on the indigenous problem: their assumption was that the situation of the natives had somehow automatically improved as they became legally free citizens.[23] Accompanying the legalistic attitude that placed the Indians on a par with the rest of the citizens was an almost total indifference to both the indigenous heritage of Mexico and the pre-Hispanic past. Ultimately, deep contradictions underlay the pre-*Reforma* liberals' relation with the realities of indigenous Mexico. For while they ideally conceived of the Indians as citizens, the liberals were deeply pessimistic about the possibilities of

[21] Hale, *Mexican Liberalism...*, p.37.
[22] Sinkin, *The Mexican Reform...*, p.20.
[23] Running against the prevailing view, Antonio Annino has argued in a recent and provocative work that liberal citizenship was monopolised by the *pueblos*, even before independence and that this category was later used by the indigenous communities to defend themselves against the intrusion of the liberal state. Antonio Annino, "Ciudadanía versus gobernabilidad republicana en México. Los orígenes de un dilema" in Hilda Sábato (coord.), *Ciudadanía política y formación de las naciones: perspectivas históricas de América Latina*. Mexico City, El Colegio de México / Fideicomiso Historia de las Américas / Fondo de Cultura Económica, 1999, pp.62-93.

"regeneration" of the native peoples.[24] In their eyes, the Indians were "backward and degraded remains of the ancient Mexican population", who could not form the base of a progressive Mexican society. Mora, in particular, advanced the thought that the Mexican character was to be sought in the "white race".[25] Whether such formulations were outright racist or not is a matter of debate. Hale refrains from qualifying Mora as a racist; Enrique Florescano, by contrast, suggests that he was indeed and further draws attention to the fact that during the late 1840s –and mainly as a reaction to the caste wars—both liberals and conservatives displayed racist features.[26]

It can be argued that the apparent racism was the other side of the coin of an unquestionable elitism. Like their conservative counterparts, most of the pre-*Reforma* liberals recoiled from democracy. Following Jovellanos and Constant, they rejected Rousseau's notion of popular sovereignty, as they advocated the rule for the people but not by the people. Favouring liberty over equality, these liberals accepted the idea of the "people" as the subject of political life, but they did not always embrace the consequences of such an acceptance, as their distrust and contempt for universal suffrage shows.[27] At the end of the day, the liberals prior to the *Reforma* believed in the rule of the citizens in a society where, despite all the rhetoric, only the higher social echelons –who were also ethnically distinct from the rest of the population—could be considered real citizens. This would be an important contrast to the programme of the Liberal Party of the *Reforma*, which constitutes the subject of the following section.

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[24] Alan Knight, "El liberalismo mexicano desde la reforma hasta la Revolución (una interpretación)", *Historia Mexicana*, 35 (1), 1985, p.62.

[25] This and the previous quote are from Hale, *Mexican Liberalism...*, p.223.

[26] Hale, loc.cit.; Enrique Florescano, *Etnia, estado y nación. Ensayo sobre las identidades colectivas en México*, Mexico City, Aguilar, 1997, pp.363-364. See also: Romana Falcón, *Las rasgaduras de la colonización. Españoles y mexicanos a mediados del siglo XIX*, Mexico City, El Colegio de México, 1996.

[27] Reyes Heroles, *El liberalismo mexicano*, v.2, pp.xviii and 265; Alfonso Noriega, *El pensamiento conservador y el conservadurismo mexicano*, Mexico City, UNAM, 1972, v.1, pp.162-171; Miguel Ángel Rodríguez, "Libertad y democracia en tres autores del siglo XIX", *Metapolítica*, 2 (5), 1998, pp.121-130. José Antonio Aguilar has suggested that the nineteenth-century liberal elites were not worried about the access to power of the subordinate classes, but rather by the rise of the contrary faction supported by the populace. Thus, it was not the popular character of universal suffrage that the liberals criticised, but the "manipulation of the popular sectors by the contending elites". José Antonio Aguilar

3.2 The *Reforma* Liberal Party and its programme

Like conservatism, liberalism was never organised as a formal party, with rigid structures or defined membership. Rather, the Liberal Party was a movement, a group of solidarities that were united in their rejection of the old society as well as in their desire to reform it. Because it provided an umbrella of general ideas under which diverse individual views found shelter, the Liberal Party was internally split into fractions and sub-fractions that differed in their views about the methods and speed with which the common principles and project should be pursued.[28]

If the Conservative Party became especially visible after the war with the United States, the Liberal Party, despite its initial reorganisation in response to the country's military defeat, would only emerge at its strongest in the aftermath of the 1854 Ayutla revolution and the overthrow of Antonio López de Santa Anna.[29] Having succeeded in ousting Santa Anna and his supporters the newly repatriated liberals set out to complete their project of ridding Mexico of what they saw as its colonial ballast. Their programme was in line with the reforms that had been attempted, but had never been fully accomplished, since 1833: consolidation of the Mexican state, strengthening of federal republican institutions, elimination of corporate privileges, disentailment of corporate land and the forging of a society of individual citizens, equal before the law and owing their prime allegiance not to village, community, corporation or privileged body, but to the nation.[30]

Like many of their liberal predecessors, the leaders of the *Reforma* had an almost blind faith in legislation as an instrument to transform society. Hence their first step in their race to transform Mexico into a modern country was to create laws directed at affirming the supremacy of the state over the corporations. To that effect between November 1855 and April 1857 the Juárez, Lerdo and Iglesias laws were enacted.[31] The first *Reforma* laws were intended to both reduce the power of the

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Rivera, *En pos de la Quimera. Reflexiones sobre el experimento constitucional atlántico*, Mexico City, Centro de Investigación y Docencia Económicas/Fondo de Cultura Económica, 2000, p.46.

[28] Guerra, *Le Mexique...*, v.1, p.152 and Reyes Heroles, *El liberalismo mexicano*, v.2, p.426. For a 1851 characterisation of those fractions by a contemporary commentator "unknown in the literary and political worlds", see: V.C., *Lijera resena de los partidos, facciones, y otros males que agobian a la República Mexicana y particularmente al Distrito Federal, escrita por [...]*, Primera parte, Mexico City, Imprenta de M.F. Redondas a cargo de Manuel C. Zuleta, 1851.

[29] See the section on the *Reforma* in chapter two.

[30] Brian R. Hamnett, *Juárez*, London, Longman, 1994, p.49.

[31] Ley de Administración de Justicia y Orgánica de los Tribunales de la Nación del Distrito y Territorios (Ley Juárez), 23 November 1855, Ley de Desamortización de Fincas Rústicas y Urbanas Propiedad de

corporations and free the individuals from their influence. As was mentioned in chapter two, the Juárez and Iglesias laws, in particular, restricted the jurisdiction of the Church and the military in civilian affairs, while the Lerdo law dictated the sale of corporate land held in mortmain. This latter measure was intended not only to undermine the economic power of the Church, but also to obliterate the indigenous regime of communal land-tenure in the belief that access to individual property would make of the Indians full citizens.

The greatest proof of the liberals' confidence in the power of the law as an agent of social change was provided, however, by their efforts to "constitute" the nation anew. The liberal leadership was convinced that if Mexico was to become modern and progressive it needed to have a fundamental law "exactly adapted to the Mexican nation",[32] free from the flaws and concessions that had made of the 1824 federal constitution "a monstrous amalgam of truth and lie, an impossible compromise between the old and the new"[33] or, as Guillermo Prieto would colourfully describe it, "a Yankee with chasuble and incense burner".[34]

Elections for a constituent congress were convoked in August 1855 and the elected congress commenced its work in February 1856. Despite its claims of being the nation's representative, the congress existed somewhat in isolation from the people, who had not voted it into position.[35] Moreover, both the clergy and the military were effectively prevented from participating in the congress; hence, the task of "constituting the nation" rested solely with the liberals. In this context, it comes as no surprise that liberal arguments dominated the constituent debates. According to Guerra,

> [d]espite the inevitable imitation of North American institutions, for regional particularism rendered the adoption of federalism imperative, the influence of the Enlightenment and European liberal thought dominated the constituent congress. If [the deputies] quoted Jefferson, they quoted Voltaire, Rousseau, Bentham, Montesquieu, Constant and Lamartine even more. But, above all, the spirit and example of the French Revolution –the

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las Corporaciones Civiles y Religiosas (Ley Lerdo), 25 June 1856 and Ley de Obvenciones Parroquiales (Ley Iglesias Law), 11 April 1857.

[32] Ignacio Comonfort, ["Discurso pronunciado al abrir las sesiones del Congreso Constituyente"], 18 February, 1856, *LAF* 1519.

[33] Ignacio L. Vallarta, *Discurso que en el solemne aniversario del día 16 de setiembre de 1810 leyó en la plaza principal de Guadalajara, el C. [...], miembro de la Sociedad Literaria "La Esperanza"*, Guadalajara, Tipografía del Gobierno a cargo de J. Santos Orosco, 1855, p.16.

[34] Guillermo Prieto, "Discurso pronunciado por el C. [...] en la Alameda de México el 16 de setiembre de 1869", *El Monitor Republicano*, 18 September 1869.

[35] Hamnett, *Juárez*, p.65.

> first revolution as well as the more recent one of 1848—were preserved as the essential sources of inspiration.[36]

The resulting constitution enunciated the rights of man and recognised them as the basis of all social institutions. It proclaimed the dogma of popular sovereignty and granted universal suffrage. It also incorporated the reformist Juárez, Lerdo and Iglesias Laws and went further in the path of secularising Mexican society. However, due to the pressure of the moderate minority in the constituent congress, the constitution fell short of proclaiming the toleration of cults. Indeed, the inclusion in the constitutional project of an article on freedom of conscience originated acrid and impassioned debates between the radical members of the congress and their moderate counterparts. Echoing what their predecessors had been arguing since the early 1830s, the champions of toleration contended that freedom of conscience was a basic human right whose recognition was of particular importance to Mexico, since it constituted the best way to encourage the strongly desired immigration of Europeans that were to populate the uninhabited Mexican territory. The opponents of toleration argued, in turn, that diversity of cults was not a reality in Mexico and, therefore, declaring toleration would only bring about more disunity in a society already plagued by division. The final decision was one of compromise: no mention of religion was made in the constitutional text. The consequence of such omission was all too important; for while freedom of conscience was not formally proclaimed in the constitution, the lack of any mention of Catholicism's being the official religion of the nation opened the back door, as it were, to religious toleration.

The 1857 constitution was, no doubt, flawed. Yet in the midst of the enthusiasm that followed its promulgation its shortcomings were overlooked. Moreover, the constitution was portrayed as an achievement, as the key to the affirmation of the Mexican people's independence and progress:

> The Mexican people, who made an heroic effort to get rid of Spanish domination and to join the sovereign powers [of the world]; the Mexican people, who have defeated all tyrannies, who have always yearned for liberty and constitutional order, now have a code, which is the full recognition of their rights and does not stop them, but rather, impels them in the path of progress and reform, of civilisation and liberty.[37]

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[36] Guerra, *Le Mexique...*, vol.1, p.30. See also: Jacqueline Covo, "La idea de la revolución francesa en el congreso constituyente de 1856-1857", *Historia Mexicana*. XXVIII (3), 1988, pp.69-79.
[37] "El Congreso Constituyente a la Nación", 5 February 1857, *LAF* 1519.

The enjoyment of this achievement required, however, that, for the first time in history, the Mexican people declare their loyalty to the constitution and the national government. Thus, all public servants were compelled to take an oath of allegiance to the new fundamental code. As Sinkin asserts, by demanding a public display of loyalty, "the new political elite forced Mexicans to choose between traditional society and the modern secular nation-state".[38] For the Mexican people, however, the choice was far more difficult than the liberal elite might have foreseen. Encouraged –and at times even coerced—by the Church, who claimed that the constitution represented an outright attack on Catholicism and threatened to excommunicate anyone who took the oath, many Mexicans refused to swear their allegiance to the constitution.[39] Reluctant civil servants were dismissed from their jobs; social unrest ensued and numerous uprisings in rejection of the constitution took place. Less than a year later, the Three Years War broke out.

The war created the circumstances in which the liberal leadership could finally accomplish its project of secularising Mexican society. Invested with exceptional powers, and therefore able to dispense with the approval of congress, between 1859 and 1860 the liberal government based in Veracruz decreed the full separation of state and Church, dissolved all religious orders, nationalised all Church property and established the toleration of cults. Despite all the similarities, the secularisation project that the *Reforma* liberals pursued differed markedly from the 1833 attempt in one central respect: the portrayal of the Church as both an enemy of the state and an anti-national element. In fact, throughout the 1830s attempts at reform, the Church was mainly attacked within the framework of anti-corporate liberalism, but it was not denounced as being anti-national. Moreover, the intellectual leadership of the 1833 reform desired to curb the privileges of the Church, but in no way did it want to destroy its position.

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[38] Sinkin, *The Mexican Reform...*, p.73. The formula of the oath was: "Do you swear to guard and ensure the observance of the political constitution of the Mexican Republic issued by the constituent congress on 5 February 1857? If it were so, may God reward you; if not, may He and the Nation demand it." It is interesting to note that in the original manuscript of the oath the word "Nation" appears superimposed on the word "Patria". See: "Juramento a la Constitución", 17 March 1857, *AGN*, Gobernación, legajo 221, exp.5.

[39] The activities of the Church aimed at dissuading Mexicans from avowing the constitution ranged from edicts and pastoral letters from the Church hierarchy to less subtle means to instil fear used by lower ranking ecclesiastics. Clergymen in the State of Mexico were reported to have spread the word that "the constitution was excommunicated [*sic*] and that if the oath were taken, the people who did it would be scratched by Satan on the following night." See: Manuel F. Soto a Mariano Riva Palacio, Tulancingo, 29 March, 1857. Mariano Riva Palacio Collection (1716-1850), 6353, *BLAC*. The difficulties facing the

Perhaps more important, the 1830s liberals were convinced of the need to preserve Catholicism as the official and exclusive religion of Mexico, for, in their eyes –as in those of the conservatives of all times—, the Catholic faith was the most important single element that united the otherwise profoundly divided population.[40]

The liberals of the *Reforma*, in contrast, acknowledged the centrality of Catholicism in the life of most Mexicans but they wanted to confine religion to the private sphere and, thereby, to remove the control that the Church as an institution exercised over the majority of the population in areas that went beyond the mere spiritual aspects. That since their arrival to power the liberals accorded respect to religion is evidenced by the fact that the first offence mentioned in the 1855 law of freedom of the press was "publishing writings in which the Catholic religion that the Nation professes, is directly attacked, being comprised in this offence the mocking and vituperation of that religion" (art.3. I) and not "publishing writings in which the popular, representative, republican form of government is directly attacked" (art.3. II).[41]

Furthermore, since 1855 and throughout all of the Three Years War, the liberals attempted to appropriate the religious language exploited by their opponents and counter the accusations they faced of being heretics by portraying themselves as the "true Christians" and their liberal-democratic programme as being the closest to the essence of Christianity. A powerful illustration of what was a widespread practice, can be found in a speech commemorating the attainment of independence in 1821, in which Juan A. Mateos asserted that "[t]he Gospel is the political code of the *liberal and progressive party*; the doctrines of Jesus Christ are its doctrines, His words are the text of [the Liberal Party's] speeches".[42]

Parallel with their respect for Catholic religion, the *Reforma* liberals entertained anti-clerical sentiments, which, as has been mentioned above, had been largely motivated by dissatisfaction with the Church's actions during the North American

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liberal elite with regard to the oath are also recounted in documents 6344, 6096 and 6407 of the same collection.

[40] Sinkin, *The Mexican Reform...*, p.121.

[41] "Reglamento Provisional de la Libertad de Imprenta", 28 December 1855, *Archivo General de la Nación*, Ramo Gobernación, legajo 221, exp.3.

[42] Juan A. Mateos, *Oración cívica pronunciada el 27 de Setiembre de 1856 en la Ciudad de Tlalpam, por el ciudadano [...]*, Mexico City, Imprenta de M.F. Redondas, 1856, p.10, emphasis in the original. Other interesting examples of the analogies drawn between the liberal programme and Christianity can be found i.a. in: Guillermo Prieto, *Oración cívica pronunciada el 27 de sbre. de 855 por el C. [...]*, Mexico City, 1855, *LAF* 917 and Miguel Cruz-Aedo, *Discurso pronunciado por el C. [...], miembro de la sociedad literaria "La Esperanza", la noche del 15 de septiembre en el salón del H. Congreso del Estado de Jalisco,* Guadalajara, Imprenta del Gobierno a cargo de I. Gutiérrez Cortés, 1857.

invasion. Notwithstanding, the initially mild anti-clericalism of the liberals only became a militant attack on the Church in response to what was deemed constant and unacceptable intervention of that corporation in politics, intervention of which the Church-instigated uprisings in Puebla against the first reform laws were only an example. It was this interference that hardened the liberal position and led the liberals to accuse the Church of being an "anti-national interest [*sic*]", which exploited "ignorance and fanaticism" for its own ends, based on the immense power that its "centuries-old influence" gave it.[43] The mobilisation in opposition to the constitution and the alliance of the Church with the conservatives during the War of Reform further contributed to the exacerbation of the liberal's anticlericalism, to such an extent that the destruction of the earthly power of the Church became a *conditio sine qua non* for the peace and liberty that the liberals so strongly desired. In the preamble to the 1860 decree of toleration of cults this is clearly expressed:

> [...] Our old legislation [...] made of the nation and the Catholic Church a regrettable amalgam, which among us, meant renouncing public peace, negating justice, abandoning progress and the absurd sanctioning of invincible obstacles for political, civil and religious liberty.[44]

Referring to Spain, François Xavier Guerra has argued that the anticlericalism of the first liberal reformers, rather than being a struggle for values, was mainly a combat against the privileges and the properties of the Church, seen at the time as the most important corporation of the *Ancien Regime*. In turn, the second liberalism was a struggle for principles; for the emphasis of liberalism had shifted from individual liberty to the general will. Once the system of the general will had been accepted, asserts Guerra, nothing legitimate could be placed above it, lest its coherence be lost.[45] The same argument could be applied to Mexican liberalism. The *Reforma* liberals transcended the initial anti-corporate liberalism of the 1830s and, following the example of revolutionary France, embraced the dogma of the general will. Within that framework, the general will was to be placed at the origin not only of power and legitimacy, but also at the centre of all definition of values. Therefore, no creed, despite its revealed character and no social body, notwithstanding its alleged sanctity, could be accepted as having preeminence over the general will.

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[43] "Manifiesto del Gobierno a la Nación", 5 February, 1857, *LAF* 1519.
[44] Secretaría de Justicia, ["Circular"], 4 December 1860, *LAF* 663.
[45] Guerra, *Le Mexique...*, vol.1, p.147.

The influence of the French Revolution did not stop, however, with the impact of the principle of the *volonté generale* on the liberals' conception of a secular society. It also shaped –at least in their rhetoric—the idea of a democratic polity that the liberals strove to create. In this respect the programme of the *Reforma* also differed strongly from the 1830s liberalism. For since the liberals' accession to power after the Ayutla revolution, democracy was portrayed not only as desirable, but also as necessary, as the panacea that would cure all of Mexico's ills:

> Democracy [is] the only political school that is capable of containing our ruin [...]; because democracy predicates equality before the law and destroys absurd privileges, because it accepts the principles of the liberal-economic school and does not accommodate an unjust and disproportionate territorial division, or the amortisation of capitals, or monopolies, or the abuses of [...] ecclesiastical contributions. [...] Democracy, in assailing the origin of our misfortunes, will end [...] the painful crisis that we are undergoing and will free the country from the disgraces that seriously threaten it.[46]

When the 1857 constitution was finally promulgated, the constituent congress proudly announced that, during its legislative works, it had "highly proclaimed the dogma of popular sovereignty and [had] sought to make the whole of the constitutional system a logical consequence of this luminous and incontrovertible truth: all powers emanate from the people; the people are ruled by the people".[47] Democracy was thus enshrined in the constitution; the idea of a sovereign people, from whom all powers originate, was placed at the core of the new political organisation. As will be shown below, this both reflected and influenced the idea of the nation that the *Reforma* liberals entertained.

Despite their open advocacy of democratic values, the liberals were less democratic than they liked to think. Whereas in their rhetoric they made the benefits of nationhood extend to all citizens, in practice they excluded most of the population from actual political participation in the life of the republic-cum-nation. Marcello Carmagnani has argued that the adoption of universal suffrage in the 1857 constitution extended the political rights of the Mexicans by making nationality coincide with citizenship; yet, at the same time, it restricted them by instituting a system of indirect elections for the most important posts, thus creating a distinction between the citizens,

[46] Vallarta, "Discurso que en el solemne...", p.14. Other examples of the role accorded to democracy in the "salvation" of the country can be found i.a. in: Octaviano Galván, *Oración cívica pronunciada el 27 de sbre. por el C. [...]*, 1855, *LAF* 917 and Mateos, *Oración cívica*....

who, as a category comprised nearly all the male adult population, and the electors, who were, in fact, a minority.[48] The corollary of this was, asserts Carmagnani, that the 1857 constitution formalised an identity between social status and political society, or as Guerra would state, between the cultural elite and the "people".[49] In a world where a significant segment of the social elite, *i.e.* the one that espoused conservatism, had been alienated, the equation between social status and political society meant that the political society was basically embodied in the Liberal Party. From there to the idea that the Liberal Party was also the embodiment of the nation itself there were, as will become apparent later, only a few steps. At the end of the day, the Liberal Party, like its conservative counterpart, presented itself as nothing less than the incarnation of the nation.

Back in the realm of rhetoric, however, the fact that, in the liberals' conception, the constitution had been the product of the general will, furnished them with a powerful weapon: the banner of legitimacy. Since the promulgation of the constitution, legality, legitimacy and liberalism would be inextricably linked. Thus, for instance, condemning the military coup that would bring the conservatives to power in 1858, Benito Juárez asserted that "the general will expressed in the constitution and in the laws that the nation ha[d] given itself through its legitimate representatives, [was] the only rule to which the Mexicans must be subjected in order to attain their happiness under the beneficent shade of peace".[50] Convinced of having justice and legality on their side, after the Tacubaya revolt, the liberals made of the constitution their banner and, ultimately, a national symbol. The fact that, after the liberal victory in the Three Years War, the conservatives turned to the European powers in their search for support and championed the establishment of Maximilian's empire, further contributed to strengthening the association of liberalism with nationalism that had begun to take form during the war of Reform.

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[47] "El Congreso Constituyente a la Nación", 5 February 1857. The principle of popular sovereignty was fully enunciated in article 39 of the constitution.

[48] Marcello Carmagnani, "La libertad, el poder y el Estado antes de la Revolución" in Montalvo (ed.), *El águila bifronte*, pp.227 ff. The logic of indirect elections is explored in François Xavier Guerra, "El soberano y su reino. Reflexiones sobre la génesis de la ciudadanía en América Latina" in Sábato, *Ciudadanía política...*, pp.33-61.

[49] Guerra, *Le Mexique...*, vol.1, p.148ff..

[50] Secretaría de Estado y del despacho de Gobernación, "Circular", 19 January 1858, *LAF* 396.

3.3 The nation of the liberals

The programme of the *Reforma* liberals was to transform traditional Mexico into a society of individual citizens, equal before the law and with right to representation at all levels of the administration, from the *municipio* to the federal congress. It further entailed fortifying the state and modernising, secularising and democratising a polity that appeared to be, at least in the liberals' eyes, still tied to a colonial mentality. Richard Sinkin and Brian Hamnett have argued that the implementation of this programme was, in fact, an exercise in nation-building, as it endeavoured to create new structures and adapt old ones to enforce compliance with state-policy decisions. Such creation and adaptation demanded, in turn, that the ultimate loyalty and commitment of large segments of the population be transferred from primordial groups to the larger national political system.[51] In opposition to this view, David Brading has asserted that while the liberals sought to create a modern state –and, to a certain extent, succeeded therein—they were not committed to building a nation.[52] In developing his argument, Brading has focused less on the creation of state structures than on the rhetoric and ideological support of the liberals' programme. He has therefore drawn attention to the dilemma that *Reforma* liberals had to confront in attempting to reconcile their firm individualism with the need to appeal to ideas of collective sacrifice in the face of the threat posed by the French intervention and Maximilian's empire. Brading concludes that although the liberals did not formulate a positive theory of the nation and, moreover, deliberately avoided every specifically nationalistic discourse, they appealed to the civic virtue of the Mexicans by invoking the concept of "*patria*", as conceived in classical republicanism.[53]

In my opinion, what Brading sees as the absence of "a positive theory of the nation" replaced by the notion of *patria* is, indeed, a civic conceptualisation of the Mexican nation. In other words, I would contend that the *Reforma* liberals did have a positive idea of the Mexican nation that envisaged it, first and foremost, as a community of citizens, whose institutions and political values represented the best

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[51] Sinkin, *The Mexican Reform..., passim.*; and Hamnett, *Juárez*, pp.12, 49, 111.

[52] David Brading, *The First America. The Spanish Monarchy, Creole Patriots and the Liberal State 1492-1867*, Cambridge, Cambridge University Press, 1991, p.674 and "El patriotismo liberal y la Reforma mexicana" in Cecilia Noriega Elío (coord.), *El nacionalismo en México. VIII coloquio de antropología e historia regionales*, Zamora, El Colegio de Michoacán, 1992, p.180 and 195.

[53] Brading, *The First America...*, p.663. This corrects the author's earlier interpretation, which asserted that the concept of "patria" as conceived by the liberals, derived from Creole patriotism. See: *Los orígenes del nacionalismo mexicano* (2nd ed.), p.139.

guarantee for survival as a group. This idea further emphasised the territorial and legal framework of the Mexican political community and, as will be discussed in detail in chapter four, was wedded to the ideal of a shared public culture in which every citizen must participate.[54] Modeled after the French revolutionary *nation*, rather than after the *patria* of Cicero, Plutarch and other classical republicans,[55] the Mexican nation of the *Reforma* liberals was founded on the notion of sovereignty of the people and had therefore, at least conceptually, a popular character that the classical *patria* lacked. It was this appeal to "the people" that, above all else, distinguished the liberals' idea of the nation from the classical republican notion of *patria*.[56]

However, if the liberal conception of the Mexican nation revolved around the pride and confidence in the republican institutions, it had, like the French revolutionary *nation*, an ethnic substratum. In fact, much in the same fashion as the French revolutionary elites looked back on the Gallo-Roman past and traced back to it their lines of descent,[57] the Mexican liberal elites turned to the pre-Hispanic –and more specifically, Aztec—past and found in it an antecedent to their fight against the Spanish/foreign oppressor. Moreover, in a similar way to the *criollo* patriots of the seventeenth century,[58] the liberals established a continuity between the Aztec empire, or "nation" as they would call it, and the Mexico they were both trying to build and resuscitate. Clearly there were contradictions and conflicts between these goals and interests, and its is precisely the aim of the next section to explore them.

3.3.1 Laws and institutions

Nearing the end of their exile in New Orleans, four prominent liberals published, in 1854, a pamphlet addressed "preferably to their compatriots", in which they rebuked the accusations that were then circulating in Mexico about their being "traitors to the *patria*". After arguing that during General Santa Anna's regime the *patria* had been

[54] See the discussion on the ethnic-civic typology of nations in chapter two.
[55] For a stimulating analysis of patriotism in the framework of classical republicanism and its differences *vis-à-vis* nationalism, see: Maurizio Viroli, *For Love of Country; An Essay on Patriotism and Nationalism*, Oxford, Clarendon Press, 1995.
[56] For the French revolutionary conception of the nation see: Josep Llobera, *The God of Modernity. The Development of Nationalism in Western Europe*, Oxford and Washington D.C., Berg, 1994, pp.179-193.
[57] Anthony D. Smith, *The Ethnic Origins of Nations*, Oxford and Cambridge, Blackwell, 1986, p.147. As has been shown by Llobera, the adoption of the Gallo-Roman past as the origin of the nation was directed at excluding the aristocracy, who claimed Frank origin, from the nation. Llobera, *The God of Modernity...*, pp.182-183.

simply equated with the person of the dictator, they asserted that, in their view, *patria* was "the country that [they] inhabited, [...] the laws under which [they] lived [and] the guarantees that [they] enjoyed". The exiles further lamented that the president and his coterie had denounced them for being traitors to the *patria*, while they seemed to forget that Santa Anna himself had "snatched [away from them] all what constituted the *patria*".[59]

Soil, laws and rights were, in a nutshell, what these liberals identified as constituent parts of their *patria* and, in their own words, of their Mexican nationality. Clearly these were elements that pointed to a conception of the nation in which the legal and institutional frameworks within the specific territory of Mexico were paramount. This emphasis on the institutional and legal dimensions, I contend, was widespread among the liberal camp and became stronger after the liberals assumed power and were faced with the need to defend both institutions and laws, first from what they deemed the conservative domestic enemy and later from foreign attack.

Indeed, the liberals' participation in the War of Reform was articulated, above all else, around the defence of the 1857 constitution, a legal code that the liberals portrayed not only as the embodiment of the national will, but, more importantly, as the crystallisation of the values of the Mexican nation. Furthermore, in the eyes of the liberals, it was not only the Liberal Party which was engaged in the defence of the constitution, but rather, the Mexican nation itself. The liberal struggle to defend the legal and institutional order, to secularise society and to strengthen the state was therefore transformed, in their rhetoric, into a struggle of the nation:

> The nation fights to preserve the majesty of its laws, which, made by all, must also be obeyed by all; [...] the nation fights to uproot the remains of colonial oligarchy; to turn the army into its supporter during the greatest conflicts, not the arbiter of its destiny; to return priesthood to its pure and sacred mission, not to its illegitimate and parricidal influence [...].[60]

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[58] See the discussion on Creole patriotism in chapter 2.

[59] Juan B. Ceballos [et al.], *Sobre una pretendida traición a México*, New Orleans, Imprenta de J. Lamarre, 1854, p.7-8. The other authors of the pamphlet are Miguel María Arrioja, Ponciano Arriaga and Melchor Ocampo.

[60] Juan Antonio de la Fuente, *Discurso que formó por encargo de la Junta Patriótica de esta Heróica ciudad el Sr. Lic. D. [...] para la tarde del 16 de septiembre de 1860 y que no pudo pronunciar por haberse enfermado*. Veracruz, Imprenta de José María Blanco, 1860, p. 18. In a letter to George Mathew, the British representative, Benito Juárez expressed the same view when he asserted: "The struggle that the nation has undertaken does not revolve around my person, but around its fundamental law, [which has been] established by its legitimate representatives." Benito Juárez to George Mathew, Veracruz, 22 September 1860, *Archivo Juárez* (hereafter cited as *MsJ*), supl. 93.

The 1861 defeat of the conservatives in the civil war symbolised for the Liberal Party the victory of the nation over the "anti-national elements", represented by the clergy, the regular army and, more broadly, what the liberals termed the "colonial aristocracy". The constitution and, more important, the laws of reform were then presented as essential not only to liberty and order, but also to the independence of the nation.[61] Furthermore, the downfall of the conservatives meant, in the liberals' view, that the Mexican nation could finally enjoy all its rights and find its place among the great peoples of the world. "From now on", said Juárez in an address to the "Mexicans" after the liberal victory, "it will not be possible to disdain the Mexican Republic, for it will not be likely that there be many peoples superior to it, in their love of liberty or in the realisation of the co-fraternity among men from all peoples and cults."[62] Triumph strengthened the liberals' faith in the power of the law and liberal institutions and further contributed to reinforce the link between the liberal order and the defence of nationality. In the same address, Juárez exhorted the Mexican people to "let the respect for legality and Reform, so heroically defended, be profounder than ever, as well as obedience to the general powers, which are the guarantee of the federation and of Mexican nationality".[63]

As the conservatives turned to Europe for support and succeeded in involving France in their project of establishing a Catholic monarchy in Mexico, the liberals faced the need to mobilise the population in the resistance against the imminent intervention. Consistent with their earlier emphasis on laws and institutions, on the eve of the landing of foreign troops on Mexican coasts, the liberals urged the Mexican people to defend the Republic (with capital "R"), its territory, and its internal administration and politics.[64] As I mentioned above, David Brading, has argued that during the French intervention the liberals not only avoided any specifically nationalistic discourse, but also that rather than appealing to the concept of "nation", they tried to convoke people to sacrifice their lives by using the concept "*patria*", which, borrowed from the classical republican tradition, corresponded vaguely with the concept of "country".[65] However, a close inspection of the liberal rhetoric reveals that while the appearances of

[61] "Neither liberty, nor the constitutional order, nor progress, nor peace, nor the independence of the nation would have been possible outside the Reform." [Benito Juárez], "A los mexicanos", 10 January 1861, *LAF* 394.
[62] Ibid.
[63] Ibid.
[64] "El presidente constitucional de la República a la Nación", supplement to no. 337 of *El Siglo XIX*, Mexico City, 18 December 1861.
[65] Brading, "El patriotismo liberal...", p.180.

the *word* "nation" are scarce, the *concept* "nation" was not altogether absent from the discourse. Moreover, there were in fact occasions in which the word "nation" not only occurred, but also did so linked to the notions of "people" –as in the French "political people" as opposed to the German *Volk*-- and of the defence of national symbols, thus evidencing a civic conception of the nation. For instance, when it became obvious that the French army would venture into Mexican territory, Juárez told the members of congress:

> [It has been] made clear for the nation [that there is a] need to defend its independence with arms [...]. The Mexican people are willing to gather around their flag and their institutions, and [despite] not having yet recovered from the two great wars that have given it *patria* and liberty, [they are willing] to seal again with their blood independence, the constitution and the reform.[66]

The liberals' widespread commitment to the idea of a political community in which all the members had equal rights and duties was eventually tied in with the belief that the liberal programme had endowed the Mexican people with specific rights. This programme –they believed—had improved the people's lives and would, therefore, incite them to defend such rights from foreign attack. During a speech at the opening session of congress, when the French army had already advanced into Mexican territory, the president of the congress said:

> The nation is determined to save its independence [...]. In a recent period, the country has acquired social and political benefits that inspire in it a double attachment to its nationality; for no longer does it see in it a vague word and an abstract idea, but a collection of positive rights.[67]

Yet throughout the intervention and the Second Empire, both in the face of adversity and in favourable conditions, it was the defence of the *patria* and its link with the preservation of the legal and institutional order derived from the 1857 constitution and the laws of reform, which were most strongly and consistently emphasised. After the liberal army's defeat by the French forces, for instance, Juárez encouraged the Mexicans to "[p]rove to the French [and] all the nations that [were] watching [them] in

[66] [Benito Juárez], "Discurso del C. [...] al abrir las sesiones ordinarias del Congreso el 15 de abril de 1862", *LAF* 1519. See also: [Juárez], "Discurso del C. Benito [...] al cerrar las sesiones ordinarias del congreso el 31 de mayo de 1862", *LAF* 1519.

[that] difficult situation, that adversity [was] not a sufficient cause for the dismay of the brave republicans who were defend[ing] their *patria* and their law."[68] Four years later, when the republic was reestablished following the defeat of the imperial army and Maximilian's execution, the argument had barely changed:

> The Mexican people with their patriotism, their valour and their constancy during the struggle have saved their independence and their institutions. In vain did the monarchical intervention attempt to destroy the Republic and its government. The [foreign] intervention vanished, fought by the people, leaving the Republic standing on its feet, stronger within and more respected outside.[69]

At the end of the war "the Mexican people" were portrayed as having fought for their independence by defending their laws and institutions. They were thought to have done so because their rights were at stake; because a conservative/monarchical victory would not only have entailed being ruled by a foreigner, but also renouncing the benefits of a democratic society that the liberals claimed to be striving to create. The ideal of democracy and popular participation, which was central to the liberal idea of the nation constitutes the subject of the following section.

3.3.2 The popular dimension

As was mentioned above, the liberals of the *Reforma* were influenced by the ideals and example of the French Revolution. This influence was translated, among other things, into positioning "the people" at the centre of the stage, as the source of sovereignty and legitimacy. The emphasis on "the people", had, in turn an important political corollary, namely, the democratic ideal, whose adoption by the *Reforma* liberals became one of the main differences between the *Reforma* liberal programme and the projects of Mexican liberals of earlier times. Now, the prominence of "the people" in the liberals' conceptualisation of the nation and their rhetorical espousal of popular government had interesting repercussions that are worth exploring. For one thing, the liberals' aspiration to popular republican rule allowed them to present themselves and their ideal of

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[67] ["Contestación del Sr. González Echeverría, presidente del Congreso"] in "Discurso del Sr. Juárez al abrir las sesiones ordinarias", 2 October 1862, *LAF* 1519.

[68] Benito Juárez, "[...], presidente de la República a sus conciudadanos", 20 May 1863, *AGN*, Gobernación, vol.491, caja 520, exp.8.

Mexico as distinctly American. In their view, America was the continent of freedom, of youth, of popular democracy. In contrast to Europe, where even the long-admired revolutionary France had succumbed to monarchical rule, America appeared as no less than the epitome of liberty.

While this identification as American-cum-republican was evident since the War of Reform, it was greatly accentuated during the French intervention and the Second Empire. Thus, if during the civil war the conflict was often depicted as resulting from the opposition between "the viceregal principle of monastic obedience and the American principle of popular governments",[70] it was in the course of the armed intervention to install Maximilian's empire that the liberals pictured themselves as defending not only the independence of Mexico, but its "American character" as well:

> Never before fellow citizens, since the heroic time of our independence had such a terrible threat been cast upon us, nor had we had to face a more powerful enemy [...]; after our emancipation, our internecine wars had for an object the predominance of a system or the ephemeral aggrandizement of a person, but we preserved our autonomy [...], the struggle against Washington's fatherland threatened us with absorption, but if we did not save the whole, at least we preserved our nationality and our American character [...]. But now this invasion is a war in which not only the life of Mexico is at stake, but also liberty in Columbus' continent.[71]

Interestingly enough, there were also voices that recalled that the popular republican principles and the dogma of the sovereignty of the people, that is to say the cornerstones of liberal rhetoric, had made their first appearance in France and from there, had been spread to the rest of the world, notably to the American continent. Trying to persuade the commander of the French interventionist forces not to attack "a sovereign and independent nation" that was simply following the example of revolutionary France, Manuel Payno wrote:

> From the day of independence to this date, this has been Mexico's civil war: the ideas of the conquest against the ideas of French philosophy. Those have [also] been the revolutions and wars in Europe: the monarchical principles versus the popular principles, the domination of families against

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[69] [Benito Juárez], "Apertura del Congreso", in *Monitor Republicano*, 10 December 1867.

[70] Ignacio Mariscal, "Discurso pronunciado el 16 de setiembre de 1860 en la plaza principal de la Heróica Veracruz, por el Sr. Lic. D. [...]", *El Progreso*, Veracruz, 24 September 1860, *LAF* 137.

[71] Ignacio M. Altamirano, "Discurso cívico pronunciado en la Alameda de México el 16 de setiembre de 1862, aniversario de nuestra independencia, por el C. [...], orador nombrado por la Junta Patriótica", *LAF* 136.

> the domination of the people [...].Will it be France who will come to destroy with its cannons the ideas that she herself has taught the Americas?[72]

In essence, it was the focus on popular republicanism that fuelled the liberals' pride in being advocates of modern ideas, and, especially after the collapse the Second Republic in France, in being distinctively American as well. But, the impact of the centrality of "the people" in the liberal idea of the nation went beyond the characterisation as American that the liberals embraced. It also entailed a reinterpretation of Mexico' past, especially, the independence movement.

As was stated above, the pre-*Reforma* liberal interpretation of Mexican history rejected the colonial era as an epoch of obscurantism; it looked back to independence as the birth of Mexico, but presented the popular phase of the movement as one of unnecessary violence and destruction. For the liberals prior to the Ayutla Revolution, the significant event had been the attainment of independence itself. Whether it had been under the leadership of Iturbide or of Hidalgo seemed to be of little relevance. In this sense, they pictured the movement for independence as a unitary one. The *Reforma* liberals, in turn, shared their contempt for the colonial era and even displayed a certain amount of Hispanophobia.[73] They also looked back to the movement of independence as a glorious time, but, in stark contrast to their predecessors, they focused on the popular insurrection and saluted it as the "historical foundation of the liberal *patria.*"[74]

For the *Reforma* liberals, the 1810 insurgency had been nothing less than a struggle of the people against the privileged classes, in other words, a fight for democracy. Assertions such as: "since the evening when the first cry of independence was heard, the idea of democracy was born in Mexico",[75] which abound in the liberal rhetoric of the 1855-1867 period, epitomise the way in which the liberals linked the

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[72] Manuel Payno, *Carta que sobre los asuntos de México dirige al Sr. General Forey, comandante en gefe de las tropas francesas, el ciudadano [...]*, Mexico City, Imprenta de Vicente García Torres, 1862, p.44-45.

[73] This was not, however, free from contradictions. The ambiguities of the liberals' understanding of the role of Spain in the Mexican past are unavoidably exposed in a manifesto in which, faced with the threat of a Spanish intervention requested by the conservatives, the liberal government called for the defence of the country and referred to Spain as "a sensible and prudent nation, [who] will not want to jeopardise the interests of two peoples and, more directly, of her own children [...]." [Benito Juárez], "El Presidente Interino Constitucional de la República a los Mejicanos", Veracruz, 31 October 1858, *AGN*, Gobernación, vol.464, exp.4.

[74] Brading, *The First America...*, p.662.

[75] Joaquín M. Alcalde, "Discurso pronunciado en el Teatro Iturbide la noche del 15 de Setiembre de 1861, por el ciudadano Lic. [...]", in *Discursos pronunciados en las funciones cívicas del año de 1861 en la Capital de la República por los CC. Ignacio M. Altamirano, Joaquín Alcalde, Ignacio Ramírez, y Guillermo Prieto*, Mexico City, Imprenta de Vicente García Torres, 1861, p.16.

popular phase of the war of independence with a fight for popular rule. In creating such a link, the liberals were doing more than challenging the view that depicted the popular insurgency as, above all else, a chaotic event that had rested on no other principle than theft. They were, more importantly, establishing a connection between their own struggle and that of the first insurgents. In fact, shortly after the triumph of the Ayutla Revolution, numerous references began to be made to the supposed continuity, and even identity, between the Ayutla movement and the war that Hidalgo had initiated. In an 1855 speech given at the celebration of the anniversary of Hidalgo's insurrection, for instance, Guillermo Prieto stated: "Alvarez's revolution is the same as Hidalgo's, it is the same struggle of the people against its tyrants, the same expression of the democratic principle [...], the same sublime programme of emancipation from despotism."[76] Moreover, the liberals conceived themselves as continuing Hidalgo's struggle and their programme of reform as the completion of the democratic work that Hidalgo himself had initiated more than four decades earlier:

> What a long distance between Ferdinand VII and the Laws of Reform that have accomplished the programme of democracy in Mexico! Through how many revolutions, furiously provoked, have we arrived to this one, which the people are leading towards triumph?! Since the cry of Dolores until the 1857 constitution, democracy had not made but moderate and interrupted advances.[77]

The *Reforma* liberals' focus on the 1810 insurgency also entailed a reshuffle in the national pantheon. The place of honour was undisputedly accorded to Hidalgo, followed by Morelos and the other leaders of the popular movement. Clearly, the reevaluation of Hidalgo and his role in Mexican history took different forms. The depictions of the priest of Dolores ranged from a semi-Messiah in one of Prieto's speeches: "the democratic principle was to become incarnate, the thought of liberty was to become man; it became man and Hidalgo appeared";[78] to a "a citizen, a legislator, a leader [and] a liberator",[79] in Ramírez's words. Nonetheless, the characterisation that remained constant throughout the *Reforma* was that of Hidalgo as the first and true

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[76] Guillermo Prieto, *Oración cívica pronunciada por el ciudadano Guillermo Prieto en la Alameda de México el día 16 de Septiembre de 1855, aniversario del Glorioso Grito de "Independencia!" dado por el cura de Dolores en 1810*, Mexico City, Imprenta de Ignacio Cumplido, 1855, p.9.

[77] Fuente, *Discurso que formó...*, p.14; see also, Mariscal, "Discurso pronunciado...".

[78] Prieto, *Oración cívica ...*, (1855), p.7.

[79] Ignacio Ramírez, "Discurso pronunciado en el Teatro Nacional la noche del 15 de septiembre de 1867, por encargo de la junta patriótica, por el C. [...]", in Ernesto de la Torre Villar (comp.), *La conciencia nacional y su formación. Discursos cívicos septembrinos (1825-1871)*, p.337.

democrat, who by convoking the people to participate in the struggle for independence was also instructing them in the exercise of their rights:

> To whom do we owe the first knowledge of these [democratic] principles [...]? To Hidalgo and the heroes that accompanied and followed him in his glorious enterprise. It was not the desire to satisfy the vile hatred between the settlers and the people born in the metropolis; nor the envy because they occupied the public posts and had a monopoly on the sources of wealth [...], no other ignoble passions impelled the war of independence; no gentlemen, the war for independence was a war of principles, to teach the people their rights and inspire in them the sense of their strength, so that, by exercising them, they could vindicate their dignity.[80]

The fact that Hidalgo was placed at the pinnacle of the liberal pantheon did not mean, however, that Iturbide was excluded as a hero. Until 1857 there were patriotic celebrations on both 16 and 27 September. Only in 1859 did the liberal government decree that the celebration of independence would take place solely on the anniversary of Hidalgo's insurrection.[81] Moreover, except for a few remarks made in liberal patriotic speeches during the War of Reform –and, therefore aimed directly at the conservatives—in which, rather than Iturbide himself, the "men who called themselves of the second epoch"[82] or "a faction"[83] were depicted as self-interested and opportunistic, Iturbide maintained a prominent position among the national heroes.

Ultimately, the liberals of the *Reforma* adopted and reproduced the view that the independence movement had been an integral one, of which both Hidalgo's and Iturbide's actions had been part. While they specifically glorified the popular phase initiated in 1810, the liberals could not reject or even ignore Iturbide and his *criollo* followers, as the conservatives had done with the 1810 insurgents, simply because it was under Iturbide's leadership that independence had ultimately been attained. This

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[80] Anastasio Zerecero, *Discurso cívico pronunciado en la Ciudad de Talpam por el ciudadano [...], el 16 de septiembre de 1855*, Mexico City, Imprenta de Ignacio Cumplido, 1855, p.2. See also *i.a.*: Ignacio Ramírez, "Discurso cívico pronunciado por el Lic. [...] , el día 16 de septiembre de 1861 en la Alameda de México en memoria de la proclamación de la Independencia" in E. de la Torre Villar, *La conciencia nacional...*, p.313 and Guillermo Prieto, "Discurso pronunciado en Tacubaya por el C. Guillermo Prieto el 16 de Setiembre de 1868 en la estación del ferro-carril, con motivo del aniversario", *El Monitor Republicano*, 18 September, 1868.

[81] "Decreto de días festivos", 11 August 1859, *LAF* 663.

[82] "[...]The work of the men who called themselves of the second epoch was the first compromise of our politics, the first ruse with which the interested cunning of the vanquished tricked [...] triumph out of the ignorance and the magnanimous candour of the victors, thus rendering it sterile." Melchor Ocampo, *Discurso pronunciado en la Alameda de la H.C. de Veracruz, la tarde del 16 de setiembre de 1858 por el C. [...], Ministro de Gobernación*, Veracruz, Imprenta de Rafael de Zayas, 1858, p.3.

[83] "[...] a faction that did not turn from colony into an independent nation, but to preserve its own privileges and its great preponderance." Fuente, *Discurso...*, p.3.

however, did not prevent them from subordinating Iturbide to Hidalgo in the heroic hierarchy:

> Hidalgo had followers, but he had no rival. Iturbide was the greatest among his collaborators, but he was not of the same stature, because if Iturbide was the spade that decided the struggle, Hidalgo was the arm that gave it impulse [...]. Hidalgo watered with his blood the tree of liberty, Iturbide, after knocking down its branches, took advantage of the season and cut the fruit.[84]

Especially after the defeat of Maximilian's empire, and confronted with the need to reconcile and unify Mexican society, the liberals made particular efforts to eliminate the distinctions between the first and the second phases of the independence war. The liberals in power remained, no doubt, faithful to their predilection for the heroic deeds of "the people" led by Hidalgo in their struggle for emancipation, but they easily accommodated Iturbide's actions as the final and necessary blow that would lead to independence. As late as 1871, following the publication of a work on the history of Mexico by Farncisco P. Arrangoiz,[85] which in general terms rehearsed the conservative version first elaborated by Alamán, a semi-official reinterpretation of the independence movement was published under the name of *Primer almanaque histórico de la independencia para 1872* (First Historical Almanac of Independence for 1872).[86] The authors of this almanac regretted what they saw as a lack of impartial works on the history of the war of independence and set out to contribute to changing this situation not by writing the history of the period, but rather by collecting and publishing the relevant documents so that the public could form its own opinion. After presenting what in fact was an apology for Hidalgo, the authors concluded: "The 16th and the 27th of September have the same right to public celebration; one feast is as pure as the other. The latter day is a consequence of the former."[87]

Unity of purpose in the eleven years of the war of independence, inclusion of Hidalgo and Iturbide side by side in the liberal ensemble of heroes, emphasis on the

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[84] Cruz-Aedo, *Discurso pronunciado...*, p.20.

[85] Francisco de Paula de Arrangoiz y Berzábal, *Méjico desde 1808 hasta 1867. Relación de los principales acontecimientos políticos que han tenido lugar desde la prisión del Virrey Iturrigaray hasta la caída del segundo imperio. Con una noticia preliminar del sistema general del gobierno que regía en 1808, y del estado en que se hallaba el país en aquel año, por D. [...]*, 4 v., Madrid, Imp. a cargo de A. Pérez Dubrull, 1871-1872.

[86] Manuel Orozco y Berra, Alfredo Chavero and J.E. Hernández y Dávalos, *Primer almanaque histórico de la independencia para 1872. A la memoria del benemérito cura de Dolores, D. Miguel Hidalgo y Costilla*, Mexico City, Imprenta del Gobierno en Palacio, 1871.

1810 insurrection and on the democratic character of the insurgency, all of these were products of the reinterpretation of history that the liberals carried out during the long years of war with the conservatives and the interventionist forces. Yet, they were not the only ones. In their search for elements to support their struggle, the liberals not only looked back to the beginning of the century, but also ventured into ancient times. They therefore recovered the pre-Hispanic past and turned it into a source of pride and inspiration.

3.3.3 Pre-Hispanic Mexico: The ethnic substratum

In October 1858, confronted with what appeared to be an imminent Spanish invasion solicited by the conservatives, Juárez, then interim president of the republic, issued a proclamation in which he urged the Mexican people to leave behind their internal divisions and unite in the defence of the nation. This appeal, which rather than simply summoning the people to the defence of the *patria*, exhorted the Mexicans to show that they were worthy of forming an independent nation, was all the more remarkable because it traced the roots of that nation, whose protection it demanded, back to the ancient past:

> Be alert generous children of the ancient Anáhuac, the occasion is suitable to fully erase, to radically extinguish the backward element that has paralysed all our efforts, sterilised all our sacrifices [and] nullified all our attempts at social well-being. Be alert! God, who does not forsake us, is offering us the best opportunity to secure forever our independence and to prove that yearning for the title of nation was not a vain aspiration, but that we can form [a nation] and sustain it.[88]

The ancient kingdom of Anáhuac was thus identified as the progenitor of independent Mexico; and its children, who had resisted the Spanish attack in the sixteenth century, as ancestors of the Mexicans who, more than three hundred years later, had to emancipate themselves from the same enemy. This identification, I would argue, points to an ethnic component that underlay the predominantly civic liberal idea of the nation. Constant throughout all the Three Years War and the ensuing years, the ethnic

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[87] Ibid., p.31.
[88] [Juárez], "El Presidente Interino Constitucional...".

substratum of the otherwise civic formulation became particularly prominent after Maximilian's execution.

To be sure, the interpretation linking the Aztec people with the Mexican nation echoed one of the favourite themes of both Creole patriotism and the nationalism of Fray Servando Teresa de Mier and Carlos María de Bustamante.[89] What is interesting to note, however, is that this re-evaluation of the Aztec past had not been present in the liberal idea of the nation before the *Reforma* period. Indeed, prior to the Ayutla revolution, the liberals had tended to scorn the pre-Hispanic past as much as they had sneered at the colonial one, for they saw in both nothing but backwardness.[90] By contrast, after the overthrow of Santa Anna, mentions of the pre-Hispanic past and its link with independent Mexico began to be increasingly common in contexts such as liberal public manifestos and patriotic speeches.[91]

The ceremonies to commemorate independence, for instance, provided numerous opportunities to highlight the continuity between Anáhuac and the Mexican nation. It is interesting to note, however, that before the war of reform it seemed to be of little importance whether the object of celebration was Hidalgo's uprising in 1810 or Iturbide's entrance in Mexico City eleven years later; for both events were interpreted as a single one: the awakening of the Aztec/Mexican nation. In 1857 on the anniversary of Hidalgo's insurrection, Miguel Cruz-Aedo asserted:

> A glorious memory is what has gathered us here today: forty seven years ago, after leaving the darkness of servitude, Anáhuac opened its eyes to light; forty seven years ago the Mexican Moses awoke his people to lead them through the path of the heroes; forty seven years ago, in Dolores, the Bethlehem of our political redemption, the holy name of liberty was pronounced for the first time.[92]

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[89] See the discussion of Creole patriotism in chapter 2.

[90] Of course there were exceptions to this and some members of what would later be recognised as the Liberal Party espoused the idea of a continuity between the Aztec and the Mexican nation well before the Ayutla Revolution. A notable example is Benito Juárez who, back in 1840 asserted: "The 16th of September 1810 is for us a day of the happiest and most pleasant memories [... for then] Divine Providence [...] gave the Aztec people a new Moses that would salvage them from their captivity. On that day, the Mexicans returned from the deep lethargy in which they lay and resolved to avenge the outraged honor of their patria." In: *Discurso que el C. Benito Juárez pronunció el día 16 de septiembre de 1840 en el aniversario del glorioso grito de Independencia, dado en el pueblo de Dolores*, Oaxaca, Impreso por Ignacio Rincón, 1840, p,3. Assertions like this presaged the prominence that the Aztec past would have in the liberal idea of the nation after Juárez assumed power.

[91] Charles Hale seems to agree that from the 1840s to the 1870s there was a change from the Creole concept of nationality to a more positive view of the indigenous roots of Mexican nationality. In: *The Transformation of Liberalism in Late Nineteenth-Century Mexico*, New Jersey, Princeton University Press, 1989, p.253.

[92] Cruz-Aedo, *Discurso pronunciado...*, p.5.

A year earlier, on the anniversary of Iturbide's victorious entry to the capital, Juan A. Mateos had alluded to the continuity between Anáhuac and what was to become independent Mexico when he said: "The magnanimous Iturbide offered [Guerrero] to proclaim independence together with him [...]. The Acatempan embrace marks the first day of victory, the first hour of happiness; it resumes the destiny of Anáhuac."[93] In time, however, and especially after the Three Years War, only the 1810 insurgency would be celebrated as the restoration of the rights of Anáhuac. For one thing, the underlying connection that the liberals saw between Iturbide and the remnants of the "colonial aristocracy" embodied in the Conservative Party eventually led to the fading of the hero of Iguala from the liberal patriotic rhetoric. At the same time, the liberals exalted Hidalgo and what they considered to be his popular struggle for the liberty of the Mexican people against their Spanish oppressors. It was not long before a connection was established between Hidalgo's fight for liberty against the Spaniards and the Aztecs' resistance to the conquerors. Hence, there emerged in the liberal rhetoric a continuity of purpose between the Aztecs and the insurgents, which resulted, among other things, in the conferring of heroic status on the Aztec leaders and warriors that had led the resistance to Cortés and his soldiers. The Aztec emperor "Guatemoczin" and the warrior "Jicoténcal" were thus incorporated, alongside Hidalgo, Morelos, Rayón, Guerrero, Victoria and the rest of the insurgent heroes, into the liberal pantheon of the fighters for the freedom of Mexico.[94]

With the resistance to the French interventionist forces and especially after the absolute defeat of Maximilian and his followers, the use of the pre-Hispanic past assumed a new role in the liberal rhetoric. Indeed, for the liberals, the victory over Maximilian in 1867 had represented more than the triumph of the Mexican nation over its invaders. In their eyes it had been, rather, the final and successful stage of the struggle for emancipation that the Aztecs had initiated with their resistance to the Spanish conquerors, that Hidalgo had revived in 1810 and that the Liberal Party had had the honour to lead to completion. In this context, Maximilian's execution appeared as the ultimate vindication of the heroic deaths of all those notable men that, since the time of the Spanish conquest, had given their life to defend their nation from foreign

[93] Mateos, *Oración cívica...*, p.7.

[94] See *i.a.*: [Ignacio] Ramírez, "Discurso pronunciado el 27 de Setiembre de 1856, aniversario de la entrada en México por el diputado ciudadano Ramírez", *LAF* 135; and Ocampo, *Discurso pronunciado..., 1858*, p.11. On one occasion the "Aztec nation" was even presented as precursor of the reform. See: Ramírez, "Discurso cívico...1861", p.314.

intrusion. Referring to the international censure that followed Maximilian's capital punishment, Ignacio Ramírez asserted: "Those insults that Europe utters because one of its chieftains has walked through the door of death in order to render homage to the shadows of Cuauhtemoctzin and Hidalgo, do but bear witness to our vow never to surrender our arms while our hopes are not secured, while our fears are not dissipated."[95] The "we" to whom Ramírez alluded was, clearly, the Mexican nation, whose origins could be traced back to pre-Hispanic times. In a similar vein, Benito Juárez commented on the bitter condemnation of which he had been the object following Maximilian's death:

> The antiquated statesmen and the monarchical press covered me with maledictions when the submarine cable told them: "Those who dared assault the nation of Anáhuac, those who committed the hideous crime of chaining its independence, destroying, setting fire, beheading, exist no more. Mexico, triumphantly, made use of its rights.[96]

For the liberals, the execution of Maximilian had not been, as European public opinion denounced it, an act of barbarism. To the contrary, for them it had represented nothing less than a necessary act of national justice. As Juárez explained it in the *Manifiesto justificativo de los castigos nacionales en Querétaro*, the "pseudo-emperor" had committed the abominable crime of "nationcide",[97] for which the only possible punishment was death. Such a crime –it becomes apparent in the text—consisted in the deliberate fusing of the state and the monarch,[98] and therefore, in the obliteration of popular sovereignty. It was this violation of the highest of all of the liberals' political precepts that deserved the ultimate penalty. It is interesting to note, however, that in justifying Maximilian's execution, Juárez took pains to demonstrate not only that Mexico, as a state, was a worthy subject of international law, but also that it was, by all accounts, a nation with a legitimate origin in the remote past:

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[95] Ramírez, "Discurso pronunciado...1867", p.341. Juárez himself pointed in the same direction when he stated: "Maximilian of Habsburg knew our *patria* only through geography. We owed this foreigner neither good nor evil. Only history told us that the representative of his ancestor Charles V burnt my progenitor Guatimotzin, turning his love of the *patria* into a crime." In: Benito Juárez, *Manifiesto justificativo de los castigos nacionales en Querétaro, por [...]*, Mexico City, Imp. de F. Díaz de León y Santiago White, 1868, p.23.
[96] Juárez, *Manifiesto justificativo...*, p.8.
[97] Ibid., pp.31, 33, 54.
[98] Ibid., p.31.

> The healthy opinion of the world will never be able to deny that Mexico is a state, which is protected by international law [*derecho de gentes*] [...]. Mexico can very well be distinguished from the nomad savage hordes, because it constitutes a defined civil society, whose members normally obey constituted authorities [...].
> It is also undeniable that Mexico is a "nation" in the technical sense of the word, because formally we are not like Russia, Austria, Prussia or the Ottoman empire, who have been and still are composed of "various nations subjected by force to a superior authority", or with unquestionable or legitimate rights [*sic*]. We inherited the aboriginal nationality from the Aztecs, and in full enjoyment of it, we do not recognise foreign sovereigns, or judges or arbiters.[99]

For the liberals, then, with Maximilian's death, the Mexican nation, depicted as a community of descent from the Aztec people, had defended its right to self-determination. In so doing, the Mexicans had fought for their "inalienable right to exist independently as a sovereign people and ruled, for better or for worse, by their own compatriots."[100] The concrete shape that the treasured self-rule had assumed was, as has been repeatedly said, that of a popular and democratic republic. Thus, although the liberals resorted to the ancient past to derive legitimacy from the Aztec/ethnic core of the Mexican nation, they remained faithful to their commitment to defending, first and above all else, the institutional system that the nation had given itself.

If the liberal idea of the nation incorporated the Aztec past as the direct antecedent to the Mexican nation, it did so almost without alluding to the contemporary descendants of the pre-Hispanic peoples. The indigenous populations were, as a matter of fact, virtually absent from the liberals' discourse. Be it because of their legalistic approach or because they truly believed in the existence of an egalitarian nation in which ethnic distinctions had no formal place, the liberals made hardly any mention of the indigenous populations as such. There were, however, a few exceptions to this, in which some attention was drawn to the link that existed between the pre-Hispanic populations from which the liberal ruling elites derived so much pride and the marginalised and impoverished Indians. On most of the occasions, the mentions of the indigenous populations were placed in the context of a concern over their deprived living conditions. Vallarta, for one, deplored that the "indigenous class", despite being "the original owner of Mexico and its riches, had been deprived of all rights, justice and

[99] Ibid., p.11.
[100] Ibid., p.4.

compassion".[101] At other times, the indigenous peoples, as descendants from the Aztecs were fused with "the people", *i.e.* in Altamirano's reading, the dispossessed, the descendants from "twenty unfortunate races" that had bequeathed together with their love for liberty, "all the pains of their ancient humiliation".[102] But, all in all these references were few and isolated. It would take nearly two more generations before the Indian entered as a subject in their own right in the conception of the Mexican nation.[103]

One more development related to the inclusion of the pre-Hispanic past in the idea of the nation of the *Reforma* liberals deserves attention. In parallel with the affirmation of the continuity between the Aztec and the Mexican nations, there began to emerge a less conspicuous but no less important line of inquiry that did not assume an unmediated continuity between both peoples, but that rather considered the pre-Hispanic heritage as only one of the components of the Mexican nation. In 1861, Ignacio Ramírez referred to the difficulties that stemmed from the existence of the two hitherto irreconcilable versions of the origins of the Mexican nation when he asked:

> Where do we come from? Where are we going? This is the double problem whose resolution both individuals and societies search for restlessly; once one end has been discovered, the other one can be fixed; the germ of yesterday encapsulates the flowers of tomorrow. If we insist in being purely Aztec, we will end with the triumph of a single race that will adorn the skulls of the other [race] in the temple of the American Mars; if we persist in our attempts to be Spaniards, we will precipitate voluntarily into the abyss of reconquest [...].[104]

Although the dilemma was posed mainly in terms of (ethnic) descent, Ramírez offered a political answer: "We come from the village of Dolores, we descend from Hidalgo and were born fighting like our forefather for all the symbols of emancipation, and, like him, fighting for such a holy cause, we shall disappear from the face of the earth."[105] In Ramírez's view, clearly coloured by the political circumstances created by the civil war, Mexico had been born with the popular insurgency in order to fight for its

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[101] Vallarta, *Discurso...*, p.7.
[102] Ignacio M. Altamirano, "Discurso pronunciado en el Teatro Nacional de México la noche del 15 de setiembre de 1861 por el Ciudadano [...]", in *Discursos pronunciados en las funciones cívicas...1861*, p.5.
[103] For the antecedents of *indigenismo* during the *Reforma* and the *Porfiriato*, see: Martin S. Stabb, "Indigenism and Racism in Mexican Thought: 1857-1911", *Journal of Interamerican Studies*, 1 (4), 1959, pp.405-423.
[104] Ramírez, "Discurso cívico...1861", p.317; see also: "Discurso pronunciado...1856".
[105] Ibid.

freedom. Yet, such interpretation, albeit political, discarded the conception of a lineal descent from the Aztecs that, generally speaking, the liberals seemed to espouse, while it also rejected the conservatives' claim that Mexico was fundamentally Spanish. For Ramírez, the movement of independence had brought about the existence of a new people in which two races worked side by side for liberty. Coexistence and not fusion seemed to be what Ramírez observed. Nonetheless, the mere fact that the dilemma was posed is significant in that it drew attention to the opposition between the two views of the origins of Mexico, which had become political banners of the contending factions, and tried to reconcile them. By doing so, Ramírez presaged future attempts to harmonise the heretofore mutually exclusive versions into an integrated interpretation of the origin of the Mexican nation. In its finished form, which would be accomplished during Porfirio Díaz's rule (1876-1910), the synthesis gave origin to the mestizo myth.[106]

Prior to its full development during the *Porfiriato*, however, the myth of the mestizo –or, to be more specific, some elements thereof-- was already emerging in the aftermath of the liberal victory over the Second Empire. Once the foreign enemy had been vanquished, the task that lay ahead was that of the pacification and the reconciliation of society. It was therefore necessary to remove the seed of further division stemming from the contending interpretations of Mexico's origins. The idea of the Mexican people as descended not only from the Aztecs and not only from the Spaniards, but as the product of the fusion of both groups, albeit hinted at in the past,[107] began to take shape. References to the mixed blood that ran through the Mexicans' veins became increasingly common in the patriotic rhetoric, but what was fundamentally novel was the re-interpretation of Mexico's history aimed at accommodating the racial fusion thesis. Anticipating by nearly two decades the new orthodoxy of the *Porfiriato*, to which he would significantly contribute,[108] Vicente Riva

[106] For and interesting analysis of the mestizo myth, see: David Brading, "Social Darwinism and Romantic Idealism: Andrés Molina Enríquez and José Vasconcelos in the Mexican Revolution", in *Prophecy and Myth in Mexican History*, CLAM, Cambridge, Centre for Latin American Studies, 1984; and Agustín Basave, "El mito del mestizo: el pensamiento nacionalista de Andrés Molina Enríquez", in Noriega Elío (coord.), *El nacionalismo en México...*, pp.221-258.

[107] In 1858, for instance, Melchor Ocampo asserted: "[Mexico] you have the tradition of the most cultivated peoples of this continent [...]. You have the gift for the arts and the work of the indigenous races! You have the imagination of the Latin race that mixed with them. You only lack the industriousness of the Saxon race!", in: *Discurso pronunciado...58*, p.12.

[108] Between 1888 and 1889, Vicente Riva Palacio directed the writing of *México a través de los siglos*, a multi-volume history of Mexico that Charles Hale has described as "the first great work of history that identified the roots of the Mexican nation as much as Indian as Spanish." Hale, *The Transformation...*, p.9. For a stimulating analysis of the context and the impact of the publication of *México a través de los*

Palacio offered in 1871 a reinterpretation of the conquest that justified it as the necessary means to the birth of the new Mexican nation. Framed within the typical liberal pride in the American character of republicanism, from which Mexico participated, Riva Palacio advanced the notion of a fusion between Spaniards and indigenous peoples, which had brought into existence a "new race":

> Republics and democracy were exotic plants in the Old World [...]; they needed another region, other men; they needed a new continent and a race that had even lost the customs and the habits of monarchical peoples [...]. America was that predestined continent: the new race was to be formed from the mixture [...] of conqueror and conquered, of vanquished and vanquishers, of masters and tributary people, and for that to happen, the conquest was necessary.[109]

The germ of the mestizo myth was thus present since the early 1870s. It would take several years before that myth was fully elaborated and officially adopted as the explanation of the origin of Mexico as a nation. But before that happened other important developments in the rise of an official formulation of the nation took place, the most significant of which was the formal efforts that, during the Restored Republic itself, were made to institutionalise the idea of the nation that the victorious liberals upheld.

3.4 Final considerations

The *Reforma* liberals set out to create a nation that did not yet exist. They envisaged a strong, secular and wealthy polity, animated by industrious citizens who would be first and foremost loyal to the nation. In order to attain their goal –the liberals believed—, it was necessary to get rid of the colonial remnants that impeded the consolidation of the state and the emergence of a modern citizenry. Hence their initial attack on corporate privileges, which affected the military, the Catholic Church and the Indian *pueblos* alike. The reaction of the Church to the liberal offensive made it clear, however, that this corporation, with its enormous power over the Mexicans' conscience, represented a

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siglos, see: Mauricio Tenorio-Trillo, *Mexico at the World's Fairs: Crafting a Modern Nation,* Berkeley and Los Angeles, University of California Press, 1996, pp.66 ff.

[109] Vicente Riva Palacio, *Discurso cívico que el C. [...] pronunció en la Alameda de México en el aniversario del glorioso grito de Independencia el día 16 de septiembre de 1871*, Mexico City, J.S. Ponce de León, Impresor, 1871, p.9.

formidable opponent to the liberals' project. For the liberals, therefore, separating the nation from the Church became imperative. In the future, the Church was to have a well-defined sphere of influence: that is, the spiritual sphere; whereas the state was to be the sole embodiment of the nation.

In their quest to bring to life the nation that they had envisaged, the liberals legislated. Impelled by an enormous faith in the transforming power of the law, the liberals were convinced that the nation had to be constituted anew. The promulgation of the 1857 constitution marked, therefore, the beginning of a new era. In fact, it was thought that with this constitution the nation had finally given itself the laws it needed to attain prosperity and to overcome the anarchy in which it had been submerged since independence. Moreover, the fact that the 1857 constitution had been the "product of the national will" made it –in the liberals' eyes—the embodiment of the values of the Mexican nation itself. Because of this, the defence of the constitution against the conservative attack was seen as the defence of the nation against the last vestiges of Spanish domination. The identity between the Liberal Party –defender of the constitution and, therewith, the values of the Mexican nation—and the nation itself began to emerge. Further advanced by the liberals' defence of the republican institutions against the French and Maximilian's attack, this identity between the Liberal Party and the Mexican nation would become one of the political myths of post-*Reforma* Mexico.

Accompanying the laws and republican institutions as essential components of the liberal idea of the nation was the espousal of popular democratic ideals. The Mexican nation, as the liberals conceived it, was to encompass all Mexicans (all adult males, that is), regardless of their social standing and ethnicity. In this context, popular sovereignty was to become the source of political legitimacy. To be sure, in practice the democracy of the liberals turned out to be mostly rhetorical. Nevertheless, the inclusion of all the people in the definition of the nation, at a moment when the conservative rivals could only accommodate them in their formulation as Catholics, is not to be ignored. Furthermore, the advocacy of democratic principles allowed the liberals to attribute to the Mexican nation a distinctively American character, and enabled them to claim continuity with what they depicted as the previous popular struggles of the nation. In this vein, the liberals recovered the 1810 popular insurgency as an antecedent of the *Reforma* and presented it as the people's struggle for democracy.

This recovery of the past did not stop, however, with the independence period. It also extended to the Aztec antiquity. The Aztecs' resistance to the Spanish conquest was thus depicted as the start of the Mexican people's struggle for emancipation which had concluded with Maximilian's execution. However, the most notable development in relation to the use of history came after the defeat of the empire, when the Aztec past was adopted as the source of the sovereignty and right to self-determination of the Mexican nation. While reminiscent of the old Creole patriotism, this new Aztecism incorporated the language of modern nationalism, as it claimed the right of the Mexican nation –inherited from the Aztecs—to "exist as a sovereign people, independent and governed, for better of for worse, by [...] fellow countrymen".[110] It would appear, in fact, that victory over the empire and the conservatives, and the securing of the republican institutions and the constitutional order, enabled the liberals to move from a discourse that emphasised laws and institutions as components of the nation to one which highlighted the nation's descent from the Aztecs.

This was a significant development that shifted the focus of the official idea of the nation from the institutions to the ethnic origins of Mexico. As will be seen in chapter four, the new emphasis on the pre-Hispanic past would make itself felt in the idea of the nation that the liberal elite sought to institutionalise after its return to power in 1867.

[110] Juárez, *Manifiesto justificativo...*, pp.4-5.

CHAPTER 4

INSTITUTIONALISING THE NATION: THE EDUCATION SYSTEM

With the restoration of the Republic that followed the liberal victory, a new era for Mexico began. There was relative stability and the national project was, for the first time since independence, virtually undisputed –at least in the political arena. The Conservative Party had been dissolved and its members treated as traitors. Even after the amnesty decreed in 1870, the former conservatives remained at the margin of politics.[1] Also, after the liberal triumph, government was, perhaps for the first time ever, under the control of an elite who had a relatively unified view about the nation and, still more important, about the means to institutionalise that view. Having the instruments of the state at its disposal, the liberal government had thus leeway to spread its view of Mexico.

Interestingly, the idea of the Mexican nation that the triumphant liberals embraced was based on a new pride. In contrast with the Creole patriots and the pre-*Reforma* liberals, the liberals of the Restored Republic were proud of the achievements of the contemporary Mexican nation. "[...] Seeing the [French] flee was like a dream to me, and there seems to be a reason to be proud of being Mexican" wrote Vicente Riva Palacio to his father after the 1862 defeat of the French army in Puebla.[2] Prior to that occasion, there had, in fact, been very few –if any—motives for national pride. With the probable exception of Antonio López de Santa Anna's successful rejection of the Spanish expedition headed by Isidro Barradas in 1829, the history of independent Mexico had been one of internal strife and international failure. In turn, the downfall of Maximilian's empire at the hands of the liberal-popular army seemed to signify the beginning of a new era, where a new –and until then atypical—optimism about the

[1] Jorge Adame Goddard, *El pensamiento político y social de los católicos mexicanos, 1867-1914.* Mexico City, UNAM, 1981, p.11.
[2] Vicente Riva Palacio a Mariano Riva Palacio, Puebla, 9 May 1862, Mariano Riva Palacio Collection, 7458, *BLAC.*

Mexican nation and its capabilities to overcome the obstacles in store appeared to be more than justified.[3]

Armed with such optimism, the liberals set out to reconstruct war-ravaged Mexico and to transform it into the nation they had imagined: a nation of citizens, living freely in a popular, democratic republic; a nation proud of its pre-Hispanic past but not yet fully aware of its Spanish heritage; a nation born politically out of the popular struggle for independence and consolidated through the *Reforma*; a nation that was finally free after defeating the foreign enemy. A national pantheon took well-defined form. In it Aztec, insurgent and liberal heroes sat comfortably next to one another.[4] Monuments were built to commemorate the heroes. In 1869, for instance, a monument to Cuauhtémoc, the last Aztec emperor, was raised with the purpose of reminding the Mexican people of "the sacrifices they ha[d] to make to always defend the independence of the *patria*, as a homage to the last and heroic sovereign of the Aztecs."[5]

Moreover, the liberal government made ostensible efforts to monopolise and control the patriotic displays: the patriotic celebrations that had hitherto been organised by the *juntas patrióticas* somewhat independently, although often in sympathetic agreement with the government,[6] began to be organised by the government itself. Aware of the symbolic power of public celebrations and acknowledging the splendour with which national holidays had been commemorated during Maximilian's short-lived empire, the liberal government strove, especially during the first years of the Restored Republic, to provide its celebrations with such a magnificence that the feasts organised by "the traitors" would not fare better than the liberal ones in the people's eyes.[7] Still

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[3] For an interesting account of the effects of this optimism and of the liberal vision of the nation on the reconstruction of the national image as a means of external recognition, see: Paolo Riguzzi, "Las dimensiones de la imagen nacional en el Porfiriato", in: Enrique Moltalvo Ortega (coord.), *El águila bifronte; poder y liberalismo en México*, Mexico City, INAH, 1995, pp.197-222.

[4] Within a couple of months of Benito Juárez's death in 1872, two decrees were issued, and notably, on the same day: one declaring Juárez "praiseworthy" (*benemérito*) son of the *patria*, and another commanding the commemoration of the dates of Miguel Hidalgo's birth and death. ["Decreto para conmemorar el natalicio y la muerte de Miguel Hidalgo"] and ["Decreto por el que se declara a Benito Juárez benemérito de la patria"], 18 April 1873, *AGN*, Gobernación, caja 578, exp.7.

[5] Abraham Olvera a Mariano Riva Palacio, Toluca, 13 February 1869, Mariano Riva Palacio Collection, 7993, *BLAC*. See also: Barbara A. Tenenbaum, "Streetwise History: The Paseo de la Reforma and the Porfirian State, 1876-1910" in William Beezley [et al.], *Rituals of Rule, Rituals of Resistance. Public Celebrations and Popular Culture in Mexico*, Wilmington, Delaware, Scholarly Resources, 1994, p.127-149.

[6] For an interesting analysis of the role of the *junta patriótica* in the Federal District, see: Michael Costeloe, "The Junta Patriótica and the Celebration of Independence in Mexico City, 1822-1855", *Mexican Studies / Estudios Mexicanos*, 3 (1), 1997, pp.21-53.

[7] [Juan José Baz], "Del Gobernador del Distrito Federal, proponiendo se nombre una comisión que se encargue de las festividades cívicas del presente mes y que para cada una de ellas ministre el gobierno

more tellingly, not only did the government organise the public celebrations, but it also commanded that public servants attend and participate therein.[8] All these measures point to the development of an active role of the ruling elite in the spread and further institutionalisation of a particular idea of the nation.

Yet, if government-led public commemoration of the nation and its heroes was a salient feature of these attempts at institutionalisation, it was, by no means, the only one. Other methods were also put to use in pursuit of the diffusion of the new official formulation of the Mexican nation. For one, the emphasis in establishing a shared public culture in which the idea of the nation could take root and be reproduced, involved unprecedented efforts to erect a system of public, state-controlled education in which the members of the national community could be instructed about their rights and duties, about their institutions and about their past.

Mauricio Tenorio has argued that, in contrast to other countries, "where the nation was made essentially to be taught, to be learned by the majority of the people", the nation created in Mexico in the nineteenth century "was made primarily to be exhibited", and only then did it become restrictively teachable.[9] Yet, the evidence available for the *Reforma* period shows that there existed, in fact, a conception of the Mexican nation that was made to be taught. Clearly different from the idea of the nation that would be spread among the Mexican masses after the 1910-1917 revolution, which Tenorio seems to have in mind, this conceptualisation revolved, not surprisingly, around the notions of territory, republicanism, democracy and rights and duties of the [Mexican] citizen and was complemented by an initial attempt to provide a unified and coherent view of Mexican history since pre-Hispanic times.

It must be said, however, that although government efforts to establish the shared public culture necessary for the growth and development of the national idea through education had no precedent in Mexican history, they were nonetheless constrained. As was stated in chapter one, elites in power use the state machinery to institutionalise and spread their idea of the nation. Power in this context is essential, for

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general 20000", September 1867, *AGN*, Gobernación, legajo 1463, exp.8. For an interesting account of independence celebrations during Maximilian's empire, see: Robert H. Duncan, "Embracing a Suitable Past: Independence Celebrations under Mexico's Second Empire (1864-6)", *Journal of Latin American Studies*, 30 (1), 1998, pp.249-277.

[8] José María Lafragua al Ministro de Gobernación [sobre la asistencia de los empleados públicos a las funciones cívicas] 3 May 1873, *AGN*, Gobernación, legajo 1778, exp.1.

[9] Mauricio Tenorio-Trillo, *Mexico at the World's Fairs: Crafting a Modern Nation*. Berkeley and Los Angeles, University of California Press, 1996, p.245. It is important to stress, however, that Tenorio's work deals specifically with the representation of the Mexican nation at the world's fairs during the Porfiriato (1880-1910).

it is not only a necessary condition for the creation of such an idea, but also for the introjection of that idea in the people. The power that the liberal elite of the Restored Republic enjoyed was, no doubt, great in comparison to that of any of its predecessors; yet it was far from being absolute. In this sense, the ability to spread the liberal idea of the nation was necessarily restricted. Speaking of Porfirio Díaz's attempts to forge a national image at the turn of the century, Mauricio Tenorio has stated:

> In the nineteenth century Mexico was a set of largely rural, illiterate, dispersed and heterogeneous societies. In such a context, the Leviathan's power to impose a nationalist ideology was not only limited, but also self-consciously confined. Therefore, the nationalist power of Mexico's Leviathan resided in its control over the national image to be exhibited, in its narrow capacity to teach the nation to a small but influential urban middle class and in its very self-awareness of the impossibility of spreading the idea of the nation to the whole country.[10]

The limitations that Díaz's predecessors, i.e. the liberal elite of the Restored Republic, encountered in trying to divulge their idea of the nation through education were even greater. For not only was Mexican society mostly illiterate, dispersed and predominantly rural, but also the state itself was, after so many years of war, financially weak and did not possess the resources to overcome these impediments in any significant way. This alone was enough to hinder the emergence of an all-encompassing school system in which the Mexicans could be socialised as members of the Mexican-*cum*-liberal nation. Yet, there was still another factor: the principle of freedom of teaching that the liberals so vehemently defended allowed for enormous differences to exist in the education that, throughout the Republic, the Mexicans received in both public and private schools. Even if, as will be seen below, despite its enunciation of the principle of freedom of teaching, the liberal federal government increasingly intervened in public instruction, private education was left untouched and could therefore thrive, especially after the 1867 restoration of the Republic. It was thus that the liberal state opened spaces in which alternative providers of education could operate and spread not only different knowledge, but also different values and alternative views of the Mexican nation.

The following pages trace the reach and limitations of the state school-system in its enterprise of giving life to the nation of citizens conceived by the liberal elite. The

[10] Tenorio-Trillo, *Mexico at the World's...*, p.245.

first section briefly looks at the importance of education for Mexican liberals before the *Reforma* period. The second section, in turn, is devoted to researching the educational policies of the *Reforma* liberals once they assumed power. The goals, the implementation and the shortcomings of those policies are all discussed in this part. The third section of the chapter explores the issue of public education during the Restored Republic and focuses specifically on the efforts made to institutionalise the idea of the nation through state schools. In the fourth section the role of private schools as alternative providers of education is analysed. Special attention is devoted to the way in which private educational institutions might have fostered or hampered the diffusion of the liberal idea of the nation. In the final part of the chapter the reach of the state's educational efforts during the Restored Republic is examined and compared to that of private institutions. The aim here is to provide a general picture of public instruction during the Restored Republic and to assess its function in the institutionalisation of the idea of the nation that the liberals had conceived.

4.1 Education and the creation of citizens

That the school was seen as an essential channel for the transformation of society since the early times of Mexico's independent life is evidenced by the importance attributed to the task of "enlightening" (*ilustrar*) the people by political elites at both ends of the political spectrum. Yet, the widespread aspiration to use formal education as a means to prepare and, even more often, create citizens was a hallmark of Mexican liberal thought. As it happens with many of the features of Mexican liberalism, the influence of Spanish liberalism in this regard cannot be sufficiently stressed. Already in 1809 the Spanish liberal Gaspar Melchor de Jovellanos had proposed that the contents of instruction and the means to diffuse it throughout the realm be determined and controlled by the Crown. This control, together with the creation and regulation of the curricula and the foundation of new schools, which in fact took place, gave origin to the concept of "public education", which was legitimated by virtue of its "public usefulness". In consonance with the liberal creed, the idea that inspired the goal of providing a homogenous education for all subjects of the Crown was to impart a stock

of basic knowledge, which should give the population the possibility of inserting itself in a common civic culture.[11]

Only three years later, in 1812, the Cadiz constitution instituted for the first time the regime of official education throughout the Spanish kingdom. Still more important for the purposes of this work, the Cortes of Cadiz also established the obligation to teach, alongside a religious catechism, a political catechism of the constitution to all Spanish schoolchildren.[12] By 1820 a royal edict had been issued prescribing that civic education be carried out through the teaching of the constitution itself, something that many a teacher interpreted as a command to teach the children how to read by using the fundamental law as textbook. The edict, issued in Spain in April 1820 was published in Mexico in August.[13] Thus, from the outset, official education in Spain and its overseas dominions had a functional role in that its aim was not simply to "instruct the people", but rather to instruct them in the liberal political values that were the foundation and support of the Spanish constitutional system.

In Mexico the influence of this liberal conception of education would be felt immediately after independence, when, aware of the Spanish legislation, several state legislatures demanded that the rights and duties of men "constituted in society" be taught in the schools.[14] Moreover, the 1824 constitution and all the projects for laws on instruction that were either drafted or actually discussed from 1823 to 1833 had at their core the aspiration to form good citizens through education. As the 1827 "Plan for Education", which was never enacted, stated, the aim was that "[e]very citizen [...] be able to read and write, [so that] he will be prepared to govern himself, lead his family and defend the rights of the nation, by which he will succeed in being a good man, an excellent father and an exemplary citizen."[15]

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[11] Valentina Torres Septién, *La educación privada en México, 1903-1976.* Mexico City, El Colegio de México/Universidad Iberoamericana, 1997, p.29.

[12] The catechism was a method of instruction used by the Catholic Church since Charlemagnes' times to teach the essential truths of Catholicism. Written in the form of simple questions and answers that were to be memorised by the pupils, the catechisms became a popular teaching method and during the nineteenth century were put to use to instruct children in subjects other than religion. See: Rafael Sagredo Baeza, "Actores políticos en los catecismos patriotas y republicanos americanos, 1810-1827" in *Historia Mexicana*, xlv (3), 1996, pp.501-538.

[13] The relevant article of the edict is reproduced in Dorothy Tanck Estrada, *La educación ilustrada, 1786-1836. Educación primaria en la ciudad de México*, 2nd ed., Mexico City, El Colegio de México, 1984, p.227, note 92. An interesting account of the contents of the Spanish political catechisms is also presented in pages 227-228.

[14] Ibid., p.228.

[15] "Plan de educación para el Distrito y Territorios", 26 December 1827, quoted by Ernesto Meneses Morales, *Tendencias educativas oficiales en México, 1821-1911. La problemática de la educación mexicana en el siglo XIX y principios del siglo XX*, Mexico City, Porrúa, 1983, p.88. As early as 1823 there was a project for a general by-law of public instruction, which included in the curriculum for

However, the distance between the ideals and reality was enormous. In fact, after 1821 education in Mexico preserved to a great extent the form it had acquired during the colony, as it continued to be essentially religious both in orientation and imprint.[16] Moreover, although the 1824 constitution placed education under the auspices of the local governments (*ayuntamientos*), it was predominantly the clergy and some private individuals or corporations who actually were in charge of instructing the children and youth. To this situation contributed not only the lack of state resources, but also the way in which the education system itself was organised. As regards primary instruction, for instance, in addition to the municipal schools, there were the *escuelas pías*, i.e. free schools that followed the pattern instituted by the Bourbon educational reforms and that were government oriented with mainly lay teachers, but located in parishes and convents. Their location notwithstanding, these schools were considered public according to the old tradition of regal patronage.[17] Thus, public primary education was composed of free government schools and "Church" *escuelas pías*, both of which had to follow the study plans fixed by the *ayuntamientos*. These plans for primary instruction included, well into the 1850s, the teaching of reading, writing and basic arithmetic, alongside the teaching of Christian doctrine, while civic education was more often than not excluded from the program. There was therefore little that public primary education could do to make future citizens out of the children of independent Mexico. Private primary education, in turn, whether free or subject to the payment of tuition was, again, a channel for the transmission of religious rather than of civic values. Even the free *escuelas lancasterianas*, so favoured by the liberal elites since their first appearance in 1822,[18] dispensed with the teaching of the civic catechism and concentrated on the instruction of the Catholic religion alongside reading and writing.

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primary schools subjects such as "constitution of the state" and "political catechism". The project also stated as a requirement for teachers that they be "of good customs and that they manifest their adhesion to the political constitution of the state". "Proyecto de reglamento general de primera instrucción y colegios", quoted in Meneses Morales, *Tendencias educativas...*, pp.78ff.

[16] Guadalupe Monroy, "Instrucción pública" in Daniel Cosío Villegas, *Historia moderna de México. La República Restaurada: La vida social.* Mexico City, Hermes, 1956, p.634 and Anne Staples, "Alfabeto y catecismo, salvación del nuevo país", in Josefina Zoraida Vázquez de Knauth, *La educación en la historia de México*, Mexico City, El Colegio de México, 1992, p.70.

[17] François Xavier Guerra, *Le Mexique; de l'ancien régime à la révolution*, Paris, L'Hartaman/Publications de la Sorbonne, 1985, v.1, p.360 and Thomas G. Sanders, "Education, Religion and the Problem of National Identity in Mexico, 1821-1917", *North American Series*, 5(6), 1977, p.3.

[18] Guerra, *Le Mexique...*, vol.1, p.362. The *Compañía Lancasteriana* was founded on 14 July 1822 as a philanthropic association for the promotion of primary instruction among the underprivileged of Mexican society. The Company was named in honour of Joseph Lancaster, the English Quaker pastor who popularised the method known as "mutual", whereby the more advanced pupils instructed their classmates. Although Lancaster's method was not altogether new –similar ways of teaching had been used in Spain since 1589–, its promotion and the refinements introduced to it at the beginning of the

If primary instruction preserved its religious orientation albeit under the supervision and control of the state, secondary and higher education were unequivocally a domain of the Church. Concentrated in the colleges of the capital –a heritage of colonial times— and in the seminaries that existed throughout the republic, the institutions of secondary education were mostly directed by members of the clergy under direct supervision not of the government, but of the Church.[19] As would happen with primary education, the curriculum of the secondary schools was more inclined towards the study and learning of religion than towards the liberal ideal of creating citizens. José María Luis Mora bitterly complained about this when he stated that:

> The education provided in the colleges is monastic rather than civic [...]. Students are told much by the churchmen, their instructors, about the religious duties, about the advantages and joys of devout life [...]. Nothing are they told about the *patria*, the civic duties, the principles of justice and honour; nor are they instructed in history, nor do they read about the lives of great men, although all of this is more closely related to the type of life to which most of these students are destined.[20]

It was precisely the predominance of the religious orientation in education that led Mora to speak about a "monopoly of the clergy" and to try to combat it since the mid 1820s. However, it would not be until 1833 under the cloak of Vicente Gómez Farías' liberal reforms that the concrete measures proposed by Mora would be taken to redirect education away from the influence of the Church and closer to the modern, "enlightened" model in which the liberals found their inspiration. Aimed chiefly at secondary and higher education, for the instruction of the elite was deemed to be more pressing than that of the masses,[21] the reforms carried out during Gómez Farías' administration sought to achieve government control and uniformity over public education. Indeed, the law of 1833 suppressed the university, the organ that had hitherto been in charge of higher education and that many a liberal saw as a bulwark of

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century made it appear novel and in consonance with the Enlightenment. In recognition of the work that the *Compañía* had carried out since its foundation, in 1842 it was entrusted with the Direction of Public Instruction. See, *i.a.*: Anne Staples, "Panorama educativo al comienzo de la vida independiente" in Josefina Zoraida Vázquez *et al.*, *Ensayos sobre historia de la educación en México*, 2nd ed., Mexico City, El Colegio de México, 1985, pp.101-102; Dorothy T. Estrada, "Las escuelas lancasterianas en la Ciudad de México: 1822-1842", in Vázquez, *La educación en la historia de México...*, pp.49-67 and Ernesto Meneses Morales, *Tendencias educativas oficiales...*, p.74.

[19] Four of the five colleges of the capital were directed by the Church. See: Meneses Morales, *Tendencias educativas oficiales...*, p.108.

[20] Reproduced in Martín Luis Guzmán (ed.), *Escuelas laicas, textos y documentos*, Mexico City, Empresas Editoriales, 1948, pp.46-47.

[21] Monroy, "Instrucción pública", p.634 and Guerra, *Le Mexique...*, vol.1, p362.

conservatism and religion, and replaced it by the government appointed General Direction of Public Instruction. This agency was then entrusted with the oversight of education at all levels. Significantly, the new curriculum for primary schools established by this law included the study of the civic catechism alongside the religious one. In turn, the curriculum of the newly instituted preparatory studies contained little in the way of civic education, although it included the study of "the languages of knowledge (*las lenguas sabias*), both ancient and modern, the language of the *patria* and the most notable [languages] of the old Indian nations", in what appeared to be a veiled recognition of the pre-Hispanic past.[22] With respect to private education, although the law explicitly advocated freedom of instruction, it nonetheless stated that private instruction had to be subject "in doctrine, in the matters of discipline (*puntos de policía*) and in the moral order of education to the general rules that will be given on the matter",[23] thus reaffirming state control over the contents and orientation of the values and information transmitted to the younger generations of Mexicans.

As was mentioned in chapter three, the 1833 liberal reforms were short-lived. Education was, in consequence, affected by the political changes that brought about the collapse of Gómez Farías' government. Nonetheless the interest in employing education as a means to attain prosperity and to instruct the people about their rights and duties was preserved to a greater or lesser degree throughout the years that preceded the *Reforma*. To be sure, throughout the first half of the nineteenth century, education was subject to the fluctuations of Mexican political life. However, be it under the patronage of federalists or centralists instruction was always seen as both a medium of economic and social advancement and as an instrument to make good citizens out of Mexicans. Notwithstanding, there was an important difference between the approaches, which lay in the emphasis on the kind of knowledge that those citizens should possess. While in the perspective of some, education was about the combat against illiteracy, for only by being able to read and write could the people learn and exercise their rights and duties, for the more convinced liberals, the heart of the matter was not simply the battle against all ignorance, but rather against a very particular kind of ignorance. As François Xavier Guerra has put it, "[w]hen the [liberals] of the nineteenth century speak about

[22] That this interest in indigenous languages arose from scientific curiosity rather than from any kind of social concern is evidenced by Mora's assertion that the languages of the "old Indian nations" should be learned "rather for instruction than for their usefulness in a country where Castilian (Spanish) is common to all members of society." Mora, quoted by Bravo Ugarte, *La educación en México...*, p.103.

[23] Quoted by Edmundo O'Gorman, *Seis estudios históricos de tema mexicano*, Xalapa, Universidad Veracruzana, 1960, p.152.

education or instruction, they do not speak about knowledge, literacy or even useful sciences; they speak, rather, about a type of man who identifies himself in spirit with the archetype of the liberal man."[24]

The accession of the liberals to power after 1855 would provide ample opportunities to try to create citizens in the image of the "liberal man". It is in this context that the education policies initiated by Benito Juárez and followed by Sebastián Lerdo de Tejada acquire full significance. For aware of the distance that existed between their own convictions and the inclinations of a population that was moved by other –traditional—values, the *Reforma* liberals set out to establish the bases of a new type of education that would allow them to form citizens and thereby to create the nation they had envisaged. The efforts carried out in this area were, no doubt, enormous; however, they were also, by necessity, uneven and thus met with mixed results. The following pages look at the education policies of the liberals in power and survey the difficulties they confronted in attaining their goals.

4.2 Education during the *Reforma*: Fulfilled and unfulfilled aspirations

Shortly after the liberals assumed power they began to dictate measures aimed at strengthening public instruction. In consonance with the *Estatuto Orgánico Provisional de la República Mexicana*, a provisory statute for the Republic, which stated that one of the faculties of the recently established government was "fostering public education in all its branches by creating and providing literary institutions",[25] the new liberal administration decreed the foundation of a secondary school for girls in April 1856 and, one year later, it set the bases for the establishment of a training school for teachers. The liberal ideal of employing the school as a means to create citizens was mirrored in the curricula of both institutions. While the school for girls included the teaching of history of Mexico and "geography, both physical and political, including in the latter the fundamental principles of the republican democratic system",[26] the training school

[24] Guerra, *Le Mexique...*, vol.1, p.359.
[25] *Estatuto Orgánico Provisional de la República Mexicana*, May 1856, quoted in Josefina Vázquez de Knauth, *Nacionalismo y Educación en México*, 2nd ed., Mexico City, El Colegio de México, 1975, p.30.
[26] ["Decreto que establece un colegio de educación secundaria para niñas"], 3 April, 1856, *AGN*, Instrucción Pública y Bellas Artes, caja 286, exp.25.

for teachers comprised a course on "history of the heroes" in the first year and a "compendium of history of Mexico" in the second year of its programme.[27]

That the first steps in the area of public instruction taken by the liberal government revolved around higher education points to the salience that this level of schooling had in the liberal design. Yet, this does not mean that primary education was abandoned to its fate; only that, as was mentioned earlier, the structure of the education system itself put elementary instruction under the control of the *municipios* and not of the federal government. In consequence, public elementary instruction was as developed –or underdeveloped—as the municipal resources permitted. In the mid-1850s, the *municipios* were far from being wealthy. In fact, despite being considered public because they were free, most of the 2424 primary schools that existed in the country in 1857 were not supported by the *municipios* or any other official agency, but rather by the *Compañía Lancasteriana* and other private institutions.[28] In spite of all their labours, these schools had a very limited reach: out of a school-age population of over one and a half million, they educated a total of 185,757 pupils; that is to say only 11 percent of the children in school-age attended elementary school.[29]

The liberals were aware of the shortcomings of the existing efforts to educate the Mexican children. Moreover, they were especially interested in promoting primary education, not only as a tool against illiteracy, but, also as a vehicle to instil even in the youngest Mexicans the values that would ensure their insertion in the republic that they were striving to create. They therefore continuously dictated directives aimed at fostering public elementary instruction. For instance, the "Manifesto to the Nation" that the liberal government issued from Veracruz on 7 July 1859 stated that the government would "forcefully try to increase the number of institutions of free primary education", for it "[was] convinced that education [was] the first and foremost basis of the prosperity of a people, as well as the most certain means to render all abuses of power impossible."[30] Underlining the political inspiration of the liberal concern for education, the manifesto added that the government would "promote and assist the publication and circulation of simple and clear manuals on the rights and duties of men in society, as well as on those sciences that most directly contribute to [society's] well-being and

[27] ["Decreto que establece la Escuela Normal"], 25 June, 1857, *AGN*, Gobernación, legajo 1023, exp.7.
[28] Vázquez de Knauth, *Nacionalismo y educación*..., p.31.
[29] Figures based on the information provided by José María Pérez Hernández, *Estadística de la República Mejicana*, Guadalajara, Imprenta del Gobierno a cargo de Antonio de P. González, 1862, pp.67-70 and chapter VII.

enlighten[ment]". The manifesto further stated that the government would ensure that these manuals "were learnt even by the children who attend primary schools, so that since their early childhood they acquire useful notions and form their ideas in a way that is convenient for the general welfare of society."[31]

How or whether these declared intentions materialised is difficult to ascertain because there is hardly any information on public education for those years. Nonetheless, it is safe to say that in fact, very little –if anything—was done in this area. For one thing, since December 1857 liberals and conservatives were at war with each other. Two governments existed, one in Mexico City, the other one itinerant; both had competing projects and policies and none of them had enough resources to both fight a war and promote education –or any other area of the public administration for that matter. However, the fact that amidst the war the liberal government occupied itself with the planning of public instruction bears witness to the importance it attributed to education. In a way, the phrasing of the 1859 manifesto encapsulates the liberal faith in education. Written with the civil war as a backdrop, the document appears to imply that the war had been a product of ignorance; had the people known their rights and duties the war would not have taken place. Thus, seemed to be the conclusion, instructing the people since early childhood in these "useful notions", i.e. their rights and duties, would prevent the break-out of wars in the future as well as the rise of abusive governments.

As the war came to an end and the liberal government returned to Mexico City, there were new attempts to reorganise and further public education at all levels. On 20 January 1861, Francisco Zarco, temporarily in charge of the Ministries of Foreign Relations and Interior, circulated a document which expressed the government's intentions to "generalise primary instruction [and] perfect the professional one in all its branches." The document further stated that the education of women would "also receive close attention, thus giving it the importance that it deserves." More importantly, Zarco's announcement reiterated the government's commitment to the freedom of teaching by stating that such freedom would "be effective, leaving [education] up to the family, the *municipio*, the State, the religious association."[32]

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[30] Benito Juárez, "Manifiesto a la Nación", 7 July 1859; reproduced in René Avilés, *Juárez y la educación en México*, Mexico City, Sociedad Mexicana de Geografía y Estadística, 1972, pp.123-124.
[31] Ibid.
[32] Quoted by Avilés, *Juárez y la educación...*, p.126.

Freedom of teaching had been, in fact, at the core of the liberal educational philosophy from the outset and during the 1856 constituent congress it was the subject of an interesting debate. For those deputies who advocated absolute freedom of teaching this was simply a consequence of the freedom of speech and, therefore, one of the basic rights of men whose validity was not open to discussion. Those who endorsed government control of education, in turn, expressed their fears that without any vigilance of the state, education would fall prey to charlatans and swindlers or, perhaps even worse, to the conservatives and the clergy, who would then provide a fanatical education opposed to the doctrine of popular sovereignty.[33] Despite these arguments, freedom of teaching was finally adopted and enshrined in article 3 of the 1857 constitution. Nonetheless, the fear that the Church and conservative forces would use education to their advantage, which had moved some deputies to advocate government vigilance, did not dissipate easily and became even greater –and to the eyes of many a liberal entirely justified—during and after the Three Years War. Indeed, the experience of the civil war convinced even the most recalcitrant liberals of the need to put education under government control. Thus, despite the repeated enunciation of the principle of freedom of teaching, the liberal government consistently increased its intervention in the area of public instruction.

It was within this context that, a few weeks after Zarco's circular was issued, all the affairs related to public instruction at all levels were placed under the supervision of the Ministry of Justice and Public Instruction. A law organising the education provided by the state followed in April. It reiterated the state supervision of public primary schools in the Federal District and territories as well as of those subsidised by the government. It further added that the government would support teachers for boys and girls in the small villages that lacked a school. More importantly for the purposes of this work, the law established a "study plan", a general curriculum that all the schools under government supervision were to follow. The emphasis of the "plan" on civic education was evident throughout. In the elementary level the plan dispensed with the teaching of religion –a compulsory subject in all preceding curricula and still present in the 1856 curriculum of the secondary school for girls issued under Comonfort's administration—and replaced it with the teaching of morals. Furthermore, in addition to the obvious elementary subjects of reading, writing and arithmetic, the "plan" established the "reading of the fundamental laws" as an obligatory topic. Aware of the

[33] See: Francisco Zarco, *Crónica del Congreso Extraordinario Constituyente 1856-1857*, Mexico City,

need to have adequate texts in order to carry out its educational mission, the government further offered a prize of one thousand pesos to the author of the best book on national history and geography and on maxims of universal morals.[34]

As regards secondary and further education, the 1861 law also envisaged the creation of a training school for teachers, whose curriculum was to include the "reading of the constitution", "political economy with applicability to the country's affairs" and "history of the country."[35] The creation of a preparatory school was also planned in the law, as was the foundation of the Direction of Funds for Public Instruction, an agency that was meant to collect and administer the funds assigned to public instruction in the federal budget.

Gradually, then, the liberal government sought to secure its control over public education and to use this control to instill the civic values it deemed necessary for the survival and development of the Republic. By requiring that all the children attending federally-funded primary schools learn about the country's institutions and laws; by making "reading of the constitution" a compulsory subject in the training school for teachers as well as in the secondary school for girls and in the primary school for adults; by including the study of the geography and the history of the country in the curriculum of the preparatory school, the government aimed to socialise the individual Mexicans as members of the nation and to make citizens out of them.

As had happened in the past and would continue happening in the future, the lack of funds prevented the liberal government from putting its planned educational reform into practice. And yet, it would be inaccurate to say that the 1861 law on education did not have any impact on public instruction. For one thing, the law served as an inspiration and was used as an example in other states of the Republic. Therefore, even if the preparatory school or the training school for teachers did not materialise, the "study plan" established by the law served as a guidance for the curricula of state-funded schools. In the state of Zacatecas, for instance, the state government, inspired by the 1861 federal law, opened a primary school for adults in 1863. Interestingly, the curriculum of this school included both the teaching of "principles of religion" and "morals" alongside the study of the political catechism.[36] Similarly, in the state of

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El Colegio de México, 1957, pp.460-472.

[34] *Ley sobre la instrucción pública en los establecimientos que dependen del gobierno general.* 15 April, 1861, *AGN*, Instrucción Pública y Bellas Artes, caja 372, exp.5.

[35] Ibid.

[36] Francisco García González, *Conciencia e inteligencia en Zacatecas. Sociedad, educación, historia, 1350-1890*, Zacatecas, Universidad Autónoma de Zacatecas, 1988, p.138.

Veracruz an educational reform was planned in accordance with the lines set out by the 1861 federal law. Even if this reform did not ultimately take place due to the economic hardship faced by the state government, the fact is that the ideas that inspired it were contained in the 1861 federal law.[37]

Money, or rather the lack thereof, was however not the only obstacle to the implementation of the reforms in education. Soon the financial crisis would become a lesser evil as the liberal government had to fight for its own survival. The French intervention, the establishment of Maximilian's empire and the war that plagued the country between 1862 and 1867 rendered every action on fronts other than the military almost impossible. Education would be among the first casualties. Moreover, as had previously been the case during the Three Years War, during the intervention years there existed two different governments, each claiming legitimacy and each of them promoting its own system of public education. While the regions under the control of the imperial troops would operate under a centralist system in which all educational measures were dictated by the imperial government with its seat in Mexico City, the states or regions controlled by the liberals continued to implement their own legislation in accordance with the federal system. In this context and lacking control over the Federal District, there was little that the liberals could do to further their educational programme. It would therefore not be until 1867 with the restoration of the republican institutions that the liberals could finally renew their attempts to organise public instruction.

4.3 Education and the institutionalisation of the nation during the Restored Republic

After 1867 the liberal government's initiatives on education were congruent with its previous educational attempts. However, they were also much more aggressive and gave the state a more active role both in the promotion and in the supervision of public education. Clearly, the experience of the war had radicalised the liberals who, although probably still convinced of the value of the principle of freedom of instruction –at least at a doctrinaire level—, were also determined to prevent a new war. In fact, for the liberals, the War of Reform, the French intervention and Maximilian's empire had only

[37] José Velasco Toro, *Educación primaria en Veracruz 1810-1910*, Xalapa, Universidad Veracruzana,

been possible because of the traditional values that the general population still held; values that, in their eyes, the clergy was responsible for promoting. For Juárez and his liberal cabinet then, the school appeared as the prime instrument to win over the conscience of the Mexicans.

This was the backdrop for the promulgation of the new law of public instruction on 2 December 1867. The political goal that inspired the law is apparent from the first paragraph of its preamble, which states that: "[...] spreading education is the safest and most efficacious way to moralise [the people] and to solidly establish the freedom and the respect of the Constitution and the laws [...]."[38] Edmundo O'Gorman has drawn attention to the relevance of the reference to the "moralisation of the people." For, in the context of the struggle for the Mexican's soul, this reference alluded to Catholicism in that it implied that neither this nor any other religion was indispensable to the existence of a social ethics.[39]

The 1867 law of public instruction made primary education in the Federal District and the territory of Baja California free "for the poor" and compulsory for all children from the age of five. It suppressed the teaching of religion in all federally-funded schools and replaced it with a class of morals.[40] The law further included in the syllabus for primary schools the study of rudiments of geography and history, especially that of Mexico; yet, it dispensed with the teaching of the political catechism. With the aim to make uniform all the curricula throughout the federal schools, the law additionally created the *Junta Directiva de la Instrucción Primaria y Secundaria del Distrito*, a body that was to oversee public instruction, and that had among other attributes that of proposing to the government the textbooks that should be used in primary schools. According to the law, the *Junta* would have to select those books which presented "the most practical method" and facilitated the "uniformity of instruction." More interestingly however, the law stated that the *Junta* should give preference to those books which, being of equal quality, had been written by Mexican authors.[41] The preference for Mexican over foreign authors was, no doubt, inspired by

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1988, p.61.

[38] *Ley Orgánica de Intrucción Pública en el Distrito Federal*, 2 December 1867. The text of the law is reproduced in Guzmán, *Escuelas laicas...*, pp.101ff.

[39] O'Gorman, *Seis estudios...*, p.171.

[40] One exception to this was made: in the newly created school for the deaf and mute pupils were required to learn the religious catechism and "religious principles". Since the school had been newly founded and not just reformed, the inclusion of religion in the syllabus must have been intentional. Whether in the eyes of the legislators the nature of the school itself made it necessary for the children to have religious education is a matter that can be much speculated about.

[41] Meneses Morales, *Tendencias educativas oficiales...*, p.177.

the need to cut the costs involved in providing schools with imported books, but it was also much more than just a matter of financial calculation. The motivation, already expressed in the past, albeit not so clearly, was to give education a national content, one that would reflect the realities of the country and would cater for the needs of Mexican children.

Primary public instruction in the Federal District saw an epoch of growth after the publication of the law. Fourteen municipal and two federal schools were founded in December 1867 and were added to the ten that existed at the restoration of the Republic. A total of 2371 pupils were educated in those schools.[42] The 1869 amendments to the law increased even more the government's involvement in and commitment to spreading primary education. After the amendments were enacted, the federal government saw itself sustaining eight schools, four for each sex, in addition to the municipal schools. The government also subsidised the schools which were dependent upon the *Sociedad de Beneficencia para la Educación y Amparo de la Niñez Desvalida*[43] and provided free books and utensils for all the Federal District schools that did not charge any school fees.[44]

Throughout the country the impact of the law of 2 December 1867 was significant. For one thing, after its publication seventeen states of the federation adopted the principle of compulsory primary education. Education in the states received, therefore, a considerable impulse. New schools supported by public resources were founded. In the City of Zacatecas, for instance, between 1868 and 1869 the number of public schools increased from ten to fourteen and the number of pupils from 1650 to 2000.[45] The increase in the number of schools was not, however, the sole effect of the 1867 law in the states. Equally important was the echo it found in the enterprise of secularising public instruction. To be sure, while some states' legislatures recoiled from excluding religion from the primary curriculum and continued to make the teaching of the religious catechism a part of the study plan, other states were quick to adopt the principle of secularism in public education. For example in the state of

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[42] ["Informe del Ayuntamiento acerca del estado que guarda la instrucción pública en la capital"], 10 December, 1869, and "Noticia del número de escuelas de instrucción primaria que hay en el Distrito Federal con expresión del número de alumnos que concurren a cada una de ellas", 31 October, 1869, both in *AGN*, Instrucción Pública y Bellas Artes, caja 232, exp.25.

[43] The *Sociedad* was founded in 1846 by Vidal Alcocer. It was a charity that provided free education to destitute children. Having had its apogee around 1857, when it sustained 33 schools with 7000 pupils, by 1869 it funded fifteen schools attended by 1579 pupils. Sergio Díaz Zermeño, *El origen y desarrollo de la Escuela Primaria Mexicana y su magisterio desde la independencia a la Revolución Mexicana*, Mexico City, UNAM, 1997, p.19; and "Noticia del número de escuelas [...] en el Distrito Federal...".

[44] Monroy, "Instrucción pública", p.675.

Veracruz on 1 March 1868 Governor Francisco Hernández y Hernández issued a communiqué prohibiting the teaching of religion in all official schools. In some cases, such as that of the school of Xico, the measure met with resistance and the state government proceeded to close down the school.[46]

But it was perhaps in the area of higher education where the reforms introduced by the 1867 law left an indelible mark, for not only did the law finally create the secondary school for girls –which, as was seen earlier, had been a liberal proposal since 1856—, but more importantly, it founded the *Escuela Nacional Preparatoria* (National Preparatory School), which would turn out to be the place where the future cadres of the nation would be instructed and formed. Indeed, the ENP was created above all else with the aim of providing a uniform and complete education to all of those who aspired to undertake professional studies. Nonetheless, given the minority character of those who wanted –or were able—to enter the professions and the lack of similar schools throughout the country, the actual result was that the ENP became the seedbed of Mexico's future elites. As was said earlier, despite the attention that elementary instruction received, it was higher education that occupied the first place in the liberals' educational concerns. Thence the salience of the ENP as the ultimate attempt of the liberals to consolidate their triumph through education. For it was precisely this that the first director of the ENP, Gabino Barreda, set out to do.

A disciple of Auguste Comte, Barreda awoke president Juárez's interest through a speech he gave in 1867 in commemoration of the independence.[47] In his speech Barreda interpreted Mexican history under the principles of positivism and stressed the importance of emancipating education from the "metaphysical yoke" that the clergy had imposed upon it. This, Barreda claimed, was necessary for the transition from the metaphysical to the positive stage that Mexico was undergoing.[48] These ideas appealed to Juárez who, soon after recovering power, appointed Barreda as the president of the commission in charge of discussing the law of public instruction. The 1867 law was thus the product of the deliberations of this commission.[49] The influence of Barreda's

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[45] García González, *Conciencia e inteligencia...*, p.142

[46] Velasco Toro, *Educación primaria en Veracruz...*, pp.64-65.

[47] Gabino Barreda, *Oración cívica pronunciada en la Plaza de Guanajuato el 16 de septiembre del presente año, por el ciudadano [...] y poesía dicha en la misma por el ciudadano Ramón Valle. Comisionados ambos para ello por la Junta Patriótica de esta Ciudad, a cuyas espensas se hace esta impresión*, Guanajuato, Imp. por Henández Hermanos, 1867.

[48] For a full discussion of Barreda's interpretation, see: Leopoldo Zea, "El sentido de la historia en Gabino Barreda", *Aztlán*, 14 (1), 1983, pp.221-233.

[49] The other members of the commission were Francisco and José Díaz Covarrubias, Pedro Contreras Elizalde, Ignacio Alvarado and Eulalio María Ortega.

thought is evident throughout the text of the law, saliently in regard to the absence of religion as a subject of study in primary school. But nowhere was Barreda's project clearer and more accomplished than in the establishment of the ENP and its curriculum. Interestingly, it is also here that the nation-building character that Barreda attributed to education becomes more evident. On the one hand, by providing the same basic "general and encyclopaedic" knowledge, based on science and not on theology, to all of those who would eventually follow professional studies, Barreda sought to ensure peace and social order, as such knowledge "would enable all citizens to appreciate all facts in a similar manner, and therefore to have similar opinions insofar as this is possible. And men's opinions are and will always be the motive of all their acts."[50] Needless to say, underlying this assertion was a desire to shape "men's opinions" in a way that was compatible with liberalism and republicanism. On the other hand, Barreda stressed the importance of having only one preparatory school in the country, where students from all states would congregate. In his perspective,

> [t]he fusion of all students in one single school [would] rapidly erase all distinctions of race and origin among the Mexicans by educating them in the same way and in the same place, with which intimate fraternity bonds among them [would] emerge as well as new family links, this being the sole means whereby the regrettable race divisions [could] be extinguished.[51]

The project was then one of homogenisation and integration, not only at an intellectual level, but also at a racial one. In this sense, for Barreda, the ENP would be the crucible of the nation. Barreda's optimism about the integrative power of the ENP was, no doubt, exaggerated, especially if one takes into account that only a minute proportion of the population did actually attend the preparatory school; however with hindsight it is possible to see how the ENP fulfilled the role, albeit partially, that Barreda had accorded it. Even if the ENP was only attended by a minority –in its first year, 1868, the school counted around 700 external and 200 internal students—[52] this minority would become, in time, the political elite of the country. Coming from very diverse social backgrounds, many young men were formed in the ENP; there they were equipped with the same basic knowledge, with similar views about politics and the

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[50] Gabino Barreda, *Carta dirigida al C. Mariano Riva Palacio, gobernador del Estado de México, por el C. [...], director de la Escuela Nacional Preparatoria, en la cual se tocan varios puntos relativos a la instrucción pública*. Mexico City, Imprenta del Gobierno en Palacio, 1870, pp.7-10.
[51] Ibid., p.39.
[52] Ernesto Lemoine, *La Escuela Nacional Preparatoria en el periodo de Gabino Barreda, 1867-1878*, Mexico City, UNAM, Ediciones del Centenario de la Escuela Nacional Preparatoria, 1970, p.79.

institutions that the nation needed. There they made friends and were ultimately socialised as members of the same group. All this would have an impact on the way this elite-in-the-making would conceive of Mexico as a nation once it reached power during the *Porfiriato*.

One more aspect of the National Preparatory School deserves attention in regard to its function in the creation of the nation of citizens that the liberals envisioned. If the general aim of the ENP was integration and homogenisation of the students in consonance with the liberal nation-building project, the curriculum of the ENP itself included, at a more particular level, elements that strengthened the notion of Mexico as a nation. Whereas civism was no longer taught, knowledge thereof was certainly an entry requirement, alongside aptitude in areas such as notions of constitutional right and rudiments of history and geography.[53] But more importantly, the 1867 curriculum of the ENP made the study of "history of the country" and "physical and political geography of Mexico" compulsory for all the students regardless of the profession they would ultimately choose. Thus, all the students of the ENP had to be eventually familiar with the physical and political characteristics of the territorial and political entity called Mexico, while they also had to learn about the history of the people that inhabited it. The notion of a human collectivity living in a given, identifiable territory and undergoing diverse processes throughout time was therefore inculcated in those young Mexicans through the school.

The last step in the quest to put public education at the service of the state and its objective of creating a nation of modern, individual citizens during the Restored Republic was taken shortly after Juárez's death, during the presidency of Sebastián Lerdo de Tejada. In September 1873 the "Additions and Reforms" to the constitution were promulgated. Through this law the main precepts of the Laws of Reform were incorporated into the fundamental code of the country. This inaugurated a new era of strained relations with the Catholic Church, who strongly reacted against the measure and, as it had done in the past, exhorted the people to reject the law and demonstrate against it. However, Church opposition had little influence over the governing elite and the process of secularising Mexican society continued at full speed.

Clearly, the liberals in power were now determined to conclude the work they had initiated in 1856-57. They realised that the promulgation of the Laws of Reform had not been enough to subject the Church to the state; that in order for the state to be

[53] Ibid., p.78.

the real and supreme power it was also essential that the laws be implemented to their final consequences. Making these laws a part of the constitution was then the first step in this direction. Furthermore, for some liberals, like Guillermo Prieto, the subjection of the Church to the state was not only convenient or even necessary but rather a religious duty, since "[t]he *Reforma* powerfully inspires in our soul the sacred sentiment of the *patria*; it will elevate it, it will make it invincible without creating a conflict between the sublime religion of the *patria* and the divine religion of God [...], for the free soul senses God through the *patria*".[54]

In the area of education the affirmation of the state over the Church was translated into a crucial measure; namely, the decision to establish secularism in public schools throughout the country. More specifically, the Organic Law of Reform promulgated in December 1874, expressly forbade the teaching of religion and the official practice of any cult in all schools of the federation, states and *municipios*. It further stated that morals would be taught in those establishments whose nature permitted it, although without reference to any cult. Total exclusion of religion from public education was then the objective of the law. With this legislation, the liberal administration of Sebastián Lerdo went as far in intervening in education –therefore disregarding the often enunciated principle of freedom of teaching— as no one before had dared do; for not only was the law applicable to the schools which depended on the federal budget in Baja California and the Federal District, as had hitherto been the case, but also to all schools supported by public funds, be they state or municipal. Thus, for the first time, there emerged an idea of a country-wide public education subjected to the same regulations.

That secularism should be the first general rule of this newly-born "national" public education is of extreme significance because it leaves no doubt as to the fundamental role that the liberals conferred on education in their nation-building project. For one thing, according to the most radical liberals, secular education, which allowed for the teaching of "universal morals" made it possible to replace the traditional Catholic values and beliefs –blamed for most of Mexico's evils— with an alternative view of reality and morality,[55] one that would be conducive to the consolidation of the liberal/republican institutions. For another, as Guerra has stated, secularism meant for the *Reforma* liberals independence from collective bodies and

[54] *Diario de los debates del 7o. Congreso Constitucional de la Unión*, Mexico City, Imprenta del Gobierno, 1873, quoted in Adame Goddard, *El pensamiento político...*, p.116.
[55] Sanders, "Education, religion and...", p.9.

actors, be they ecclesiastical or civilian, while entailing subjection to the state. This subjection was, however, not seen as such in the liberal ideology, but rather as liberty, insofar as the state was considered to be an organ of the general will. In this context, secularism meant independence from all value-systems –traditional or religious— which were different to the one that emerged from that general will and could, therefore, overcome all intermediate loyalty and transmit the sole and most important loyalty of all: that of the citizens towards the nation.[56]

With the implementation of the Organic Law of Reform the road was closed to religious instruction in public schools. But in no way did this mean that all education was to be secular. The principle of freedom of teaching, which the liberals professed allowed and encouraged the establishment of private schools. It would be these kinds of schools which would continue providing religious education to the Mexican children and youth. Moreover, due to their general orientation, i.e. distant from, if not outright opposed to, the views of the liberal state and protected by the freedom of teaching, private schools were in a position not only to teach and disseminate religion, but also to disseminate a different idea of the nation to the one that the liberal secular state attempted to diffuse through public schools. The following pages seek to chart the role of private schools as providers of alternative education during the *Reforma* period.

4.4 Private schools and their alternative educational programmes

Throughout the first half of the nineteenth century, the concept of "private education" suffered important changes in Mexico. As was said earlier, during the first decades of Mexico's independent life, the division between private and public instruction was far from being clear-cut. In fact, despite the government's declared interest in promoting public instruction, the main provider of education was, well into the 1850s, not the state, but rather the Church and private associations such as the *Compañía Lancasteriana* and the *Sociedad de Beneficencia para la Educación y Amparo de la Niñez Desvalida*. Yet, parish schools, which were mainly supported by the Church – although also heavily subsidised by the government—, were considered public and those maintained by the *Compañía* and the *Sociedad* received significant support from the state, which also gave them the character of semi-public schools. The fact that from

[56] Guerra, *Le Mexique...*, vol.I, p.185.

1842 to 1845 the government itself delegated its educational functions in the area of primary/elementary instruction on the *Compañía Lancasteriana* bears witness to the close connection that existed between the work of this association and the government's educational efforts. Thence, when one speaks about private education during the time prior to the *Reforma*, what springs to mind is not these parish and semi-public schools, but rather the instruction provided by private teachers or tutors, normally of European origin, who gave dance, music or drawing lessons to the children of the aristocracy in their own homes and who, towards 1830, began to open schools for a sector of students who were capable of sustaining such schools without receiving any subsidy from the government.[57]

It would only be with the advent of the *Reforma* and the increasing secularisation of life that it championed that a neat division between private and public education appeared to emerge. In fact, as the conservative resistance to the *Reforma* project increased, so did the conviction of the liberals of the need to use the school as a tool at the service of the state and its values. The absolute faith in the principle of freedom of instruction contained in the liberal creed thus gave way to what Josefina Vázquez has called "the acceptance of the French Revolution legacy of the educating state".[58] The *Reforma* educating state had a very clear programme of modernisation and secularisation that, by definition, made it impossible for it to rely on the Church for the spread of education. Therefore, from the beginning of the *Reforma*, the schools sustained by the Church were no longer considered public. Furthermore, in the context of the *Reforma*, a decree was issued in February 1861 secularising all the "welfare establishments" of the Catholic Church, among which the schools were included.[59] For a short period, then, there did not exist any Church schools, for those which had existed were appropriated by the government. The contrast could not be stronger: from providing education in place of the state and always in agreement and cooperation with it, the Church lost all its schools to the state and was expressly forbidden to engage in educational activities.

The restoration of the Republic in 1867 would change this situation again as President Juárez, in his attempts to reunify the country, implemented a policy of reconciliation, which concluded in a general amnesty decreed in 1870. During that

[57] Torres Septién, *La educación privada...*, p.32. A colourful account of the characteristics and teaching methods of those private tutors can be found in Staples, "Panorama educativo...", pp.114-117.
[58] Vázquez, "Prólogo", in Torres Septién, *La educación privada...*, pp.14-15.
[59] Adame Goddard, *El pensamiento político...*, p.73.

period (1867-1870) Juárez was tolerant towards the Church and the clergy and even suspended the application of the Laws of Reform. These measures made it possible for the Church to reorganise itself and opened new spaces for it to renew its educational activities. Therefore, Church schools began to operate again, albeit in very reduced numbers, but this time and thereafter they would be considered clearly and unequivocally private.

The case of the schools that provided free education but were not run by the state, such as those maintained by the *Compañía Lancasteriana* and the *Sociedad de Beneficencia para la Educación y Amparo de la Niñez Desvalida* is less straightforward, for these schools preserved the semi-official character that had distinguished them in previous times. Although theoretically they could be considered private –in that they were not run by the state—, the subventions they received from the government restricted their autonomy significantly. In this vein, for instance, in December 1861 the Minister of Affairs and the Interior sent a circular to the president of the *Compañía Lancasteriana*, informing him that the system of secular education had been legally instituted[60] and that since the Lancaster schools enjoyed a state subsidy they could not continue teaching religion in their classrooms.[61] Although during the *Reforma* there never existed an explicit statement declaring the Lancaster schools part of the system of public education, the fact that "recommendations" from the Ministries could be made to the president of the *Compañía* by virtue of the support afforded by the government points to the possibility that schools that received state financial aid were considered, if not public, at least aligned to the government.[62] In the specific case of the *Compañía*, moreover, the links to the government transcended the mere financial sphere, as prominent politicians –often members of the cabinet—tended to occupy the national presidency of the association. Sebastián Lerdo de Tejada, for one, would be president of the *Compañía Lancasteriana* after the restoration of the Republic in 1867.[63] The close connection that existed between the *Compañía* and the government was finally formalised in 1869 through the internal rules of the *Compañía*,

[60] As will be remembered the law of 15 April 1861 had eliminated religion from the primary curriculum.
[61] This document, which was not available in the archives I consulted, is referred to by Héctor R. Olea, *Trayectoria ideológica de la educación en Sinaloa (1592-1939)*, Culiacán, Universidad Autónoma de Sinaloa, 1993, p.87.
[62] Torres Septién states that the Lancaster schools as well as those sustained by other beneficent societies were considered public because they were free. The arguments employed in the circular sent to the *Compañía's* president would suggest, however, that they were considered public because they received state subsidies. Torres Septién, *La educación privada...*, p.32.
[63] Compañía Lancasteriana, "Acta de la sesión del 1 de julio de 1867", Mariano Riva Palacio Collection (1716-1880), 7728, *BLAC.*

which reiterated that the goal of the association was to aid the government in its efforts to propagate instruction among the needy.[64]

As regards the schools that charged tuition, they continued to provide education to the better-off Mexican children and youth. Needless to say, they were considered, as they had been prior to the *Reforma*, straightforwardly private. Protected by the freedom of instruction adopted in the 1857 constitution, these schools carried on teaching their own curricula and, after the *Reforma*, they became the bulwark of those who opposed the secular educational project of the liberal state. Indeed, especially after the enactment of the law of 2 December 1867, broad sectors of the population found the type of education provided by the state unacceptable. For them, the secular and positivistic orientation of the official curriculum was in frank conflict with Catholicism. Moreover, for the more traditional sectors of Mexican society, among which the defeated conservatives were salient, what the liberal government was trying to do through its educational policy was nothing less than "substitut[ing] in the imagination of children, in the adoration of adults, the true God for the God-*patria*".[65] In their view, it was therefore necessary to ensure spaces where the true values of the Mexican people, i.e. Catholicism, could be taught and reproduced.

As the *ayuntamientos* and *municipios* opened new secular schools in compliance with the 1867 law, private schools, both free and where tuition had to be paid, proliferated in response. Most of these private schools aimed to provide the religious education that the state had eliminated from the official curriculum, and were therefore outright Catholic.[66] Yet, it was not the Church itself which had opened those schools and was in charge of their administration, but rather Catholic individuals or associations with an interest in education. Thus began a trend that would continue well into the early twentieth century; namely, that the Church itself would not have to engage in education –especially at primary level—, for specific sectors of the Mexican society would take it upon themselves to provide a Catholic alternative to the secular and positivistic education offered by the state.

This was precisely the case of the *Sociedad Católica Mexicana* (Mexican Catholic Society), an organisation founded in 1868 by members of the defeated

[64] Meneses Morales, *Tendencias educativas oficiales...*, p.186-187
[65] Quote of *La Voz* in Adame Goddard, *El pensamiento político...*, p.91.
[66] According to Torres Septién, "[f]rom the Restored Republic, "Catholic school" is translated as "private school" in strong opposition to government schools and to the policies based on positivism and the religious indifference of the *Ayuntamiento* [...] The private school in Mexico acquired since then the

Conservative Party. Conceived as an apolitical association, the *Sociedad*'s main objectives were to help in the reorganisation of the Church and to contribute to the education of the Mexican people.[67] To that end, the *Sociedad* began offering evening classes of religion, French and arithmetic. Soon, however, the activities of the *Sociedad* expanded, and by 1874 this organisation was responsible for most of the free Catholic schools that existed throughout the country. In 1877 the *Sociedad* was able to report that it was responsible for forty-four free schools, nineteen secondary schools, three schools of law and eight Sunday and evening schools for adults.[68]

Valentina Torres Septién has argued that what distinguishes private from official education is mainly the possibility that private schools have of imparting a series of additional teachings to the official curriculum. She adds that those teachings normally have a specific orientation of religious, cultural, sporting and artistic nature, that is closely related to the social sector to which these schools are directed.[69] In the case that concerns us most private schools where tuition was paid were meant to cater for the educational needs of the higher echelons of society.[70] They were predominantly urban and, with few exceptions, sought to provide the religious education that, since 1861, but more effectively since 1867 had been excluded from official schools. Therefore, in addition to the official curriculum, subjects such as "sacred history", "Christian doctrine" and "religious instruction" appeared invariably on the prospectus

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meaning that it currently has: that of being an alternative to the state school, where official policies can be questioned and even fought." *La educación privada...*, pp.32-33.

[67] Adame Goddard, *El pensamiento político...*, p.16.

[68] *Memoria de la Sociedad Católica de la Nación Mexicana. Que comprende el período transcurrido desde el 25 de diciembre de 1868, época de su fundación, hasta el 1o. de mayo de 1877.* Mexico City, Imprenta de Francisco R. Blanco, 1877. A thorough analysis of the work of the *Sociedad Católica Mexicana* is presented in Adame Goddard, *El pensamiento político...*, ch. 1 and 3.

[69] Torres Septién, *La educación privada...*, p.18. An illuminating example of this "functional" role of private education is provided by the prospectus of a secondary school in Campeche. Listed among the subjects taught in the school is "Mayan language". A note follows stating that the school had "an excellent teacher of this language, which is so useful to the *hacendados*." The fact that most peasants in Campeche were Mayan and spoke no Spanish rendered the knowledge of Mayan particularly useful to those whose estates would be the labouring fields of the Mayan population. See: *Liceo Científico y Comercial de Campeche*, 23 December, 1851, *AGN*, Gobernación, legajo 250, exp.1.

[70] Minister of Instruction José Díaz Covarrubias criticised the tendency of the higher classes to seek private education for their children in José Díaz Covarrubias, *La instrucción pública en México. Estado que guarda la instrucción primaria, la secundaria y la profesional en la República. Progresos realizados; mejoras que deben introducirse*, (1875), Facsimile Edition, Mexico City, CONACYT, 1993, p. lxxi. Other contemporary indications that private schools that demanded the payment of tuition were elitist can be found in Miguel Lerdo de Tejada, *Cuadro sinóptico de la República Mexicana en 1856. Formado en vista de los últimos datos oficiales y otras noticias fidedignas*, Mexico City, Imprenta de Ignacio Cumplido, 1856, p.63 and Antonio García Cubas, *Compendio de historia de México y de su civilización para uso de los establecimientos de instrucción primaria*, Mexico City, Imprenta del Sagrado Corazón de Jesús, 1890, pp. 226-227.

of private schools. Often complementing this list were subjects like foreign languages, saliently French and English, music and book-keeping.

Free private schools, in turn, aimed to educate the underprivileged. The subjects that they taught were basically dictated by their finances; i.e., the more resources they had the more ambitious their programme was. Logically, in the face of economic hardship instruction in these schools was reduced to the most basic, namely reading, writing, arithmetic and, more often than not, Christian doctrine. As regards the semi-official schools –those which were co-funded by the government but were not formally part of the state education system—, they had to align themselves with the official educational policies and thus could not teach religion. However, they were not prevented from teaching additional subjects such as French and book-keeping.[71]

Now, while it is clear that the curricula of private and public schools differed in varying degrees, it is not obvious to what extent –if at all— these differences were conducive to the emergence and diffusion of diverse ideas of the nation. In principle, the freedom of instruction under whose cover all private schools operated enabled these schools to design their own curricula and imprint them with the ideological orientation they saw fit. From this perspective it is possible to imagine that varied and alternative interpretations of the country's history as well as of its institutions could be disseminated in the classrooms of private schools. In practice, however, it is difficult to determine whether and, if so, how this occurred; for information on private schools during the *Reforma* and Restored Republic periods is fragmentary at best. Yet, while probably not sufficient to draw general conclusions, the available data do point to some trends in the ways in which private schools might have contributed to or hindered the creation of the nation of citizens as conceived by the liberal state.

To begin with the most apparent, a look at the curricula of both private and public schools reveals that there were significant differences in regard to the teaching of the subjects of national geography, civics and national history, all of which are important elements in the transmission of the idea of the nation through school education. The teaching of national geography or "particular geography of Mexico", for one, assumes the existence of a territory, of a physical space, where the nation lives. In this sense, it is fundamental to the reproduction of the territorial conception of the nation. By the time of the liberal triumph in 1867 the territorial conception of Mexico

[71] According to Monroy, the private schools which depended on the beneficent organisations, especially the Lancaster schools, competed with the public schools and their curricula. Monroy, "Instrucción pública", pp.678-679.

was fixed. There was an agreement as to the extension and physical characteristics of the land that the Mexican nation inhabited. Nonetheless, the study of geography was not the rule in all public schools of the country. Although both the law of 1867 and of 1869 included geography of Mexico as a compulsory subject in federally-funded primary schools, not all the states' programmes included it. In fact, in 1875 only eleven of the twenty-five states of the federation required the study of national geography in their primary curricula.[72] By contrast, most private primary schools whose curricula were available for consultation contained geography of Mexico in their primary study programmes, even in those states where, according to the law, the subject was not obligatory. It can therefore be argued that private schools tended to contribute to the diffusion of the conception of Mexico as a spatially defined entity with clearly identifiable borders and characteristics such as "astronomic and topographic situation, physical aspect, population, territorial division, climates and produce, seas, rivers, volcanoes, mountains, capitals and important cities, agriculture [and] trade [...]."[73] To what extent the spread of these notions was accompanied by an attempt to relate the territory of Mexico to its population conceived as a nation is not altogether clear from what is stated in the private schools' prospectus. It is clear, however, is that the description of the country's geographical features was frequently complemented by the praise of Mexico's natural beauties and richness. As will be explored in depth in chapter five, this characteristic of the geography courses might have aided the emergence of a sense of pride in the Mexican soil.

An area where the relationship between education and nation-building is perhaps more palpable is that of civic education. The importance that the liberals attributed to familiarising the Mexican children with the laws of the country as well as with the rights and duties of the citizen as a means to create a civic nation has been repeatedly stressed in previous pages. Hence, when comparing private and public primary instruction a most evident difference in this regard is that civic education was a conspicuous absentee in the curricula of private primary schools. While it is true that from 1867 civic education as a subject in itself was excluded from the curriculum of the

[72] These states were Aguascalientes, Coahuila, Guanajuato, Jalisco, Michoacán, Nuevo León, Oaxaca, San Luis Potosí, Sinaloa, Veracruz and Yucatán. Data based Díaz Covarrubias, *La instrucción pública en México*.... It is likely that some other states included geography in their curricula but failed to provide this information in time for the publication of Díaz Covarrubias' report. This consideration applies to the data on civic education and national history as well.

[73] *Instituto Literario de Jalapa*, December 1869, *LAF* 1074. Similar lists of topics were common in private schools. For a later example in the state of Puebla see: Torres Septién, *La educación privada*..., pp.72-73, note 60.

federal primary schools, in more than half of the states of the federation it continued to be a compulsory subject of official primary instruction. Indeed, be it under the title of "constitutional political catechism", "rights and duties of the citizen" or "fundamental laws of the country", civic education was an integral part of the curriculum of public primary schools in at least fifteen of the twenty-seven states of the federation.[74] Moreover, the semi-public schools of the *Compañía Lancasteriana* included in their curricula for both girls and boys subjects such as "explanation of the Constitution and of the fundamental laws of the Republic" as well as "rights and duties of the citizen."[75] By contrast, in none of the consulted curricula of private primary schools did civic instruction appear as a subject. Even those schools directed by individuals who explicitly stated their interest in contributing to the greatness of Mexico by means of forming citizens and patriots, excluded the teaching of civism from their study plans.[76] How the children who attended these schools were going to be formed into citizens or be imbued with patriotism is not altogether clear. Nonetheless, it appears that it would not have been, as in public schools, through the familiarisation with the laws of the country or with the rights and duties of the citizen, as the liberals would have it. In this sense, the education provided in private primary schools did not necessarily reinforce the idea of Mexico as a nation of citizens living in a democratic republic that the liberals envisaged.

The case of the teaching of "national history" in private primary schools is less straightforward. Again, although the 1867 law had included the study of "history, especially that of Mexico" as a compulsory subject in federally funded primary schools, the 1869 by-law eliminated it from the curriculum. This notwithstanding, the 1870 rules for municipal schools in the Federal District incorporated the study of history of

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[74] Civic instruction was part of the primary curriculum of the states of Aguascalientes, Campeche, Chiapas, Coahuila, Durango, Guanajuato, Guerrero, Jalisco, State of Mexico, Morelos, Nuevo León, Oaxaca, Puebla, Sinaloa and Zacatecas. These data are based on Díaz Covarrubias, *La instrucción pública en México....*

[75] *Reglamento de la Compañía Lancasteriana de México*, Mexico City, Imprenta en la Calle Cerrada de Santa Teresa, núm.3, 1872, arts. 73 and 74.

[76] For instance, Celso Acevedo, director of the Ateneo Mexicano claimed that he wished "to cooperate [...] towards the grandeur of the *patria* by providing it, in time, with citizens that honour[ed] it" and Manuel Ruiz Dávila, director of the Colegio de Jesús stated that his aim was to form "not only well-educated youngsters, but mainly virtuous and honest Mexicans, [reason why] no opportunity [would] be missed to inculcate in the tender heart of the pupils [...] the deepest patriotism." See: "Ateneo Mexicano. Escuela universal de idiomas, matemáticas, ciencias físicas y morales, bellas artes, bellas letras &c." Mexico City, 1 January 1867, *AGN*, Instrucción Pública y Bellas Artes, caja 364, exp.5 and *Colegio de Jesús. Instrucción elemental y superior para niños dirigida por el profesor titulado Bachiller Manuel Ruiz Dávila*, 1872, *LAF* 1556.

Mexico in the fourth year of the primary study plan.[77] Furthermore, beyond the Federal District, by 1875 the public primary schools of eleven states[78] required their pupils to learn the history of Mexico, as did the schools of the *Compañía Lancasteriana*. Thus, while not an obligatory subject according to the federal law, "national history" was however a common feature of public primary instruction in a large part of the country. Private schools, in turn, were far from uniform in this respect. Many dispensed with the teaching of history of Mexico altogether. Some of them did it for lack of resources; others for lack of interest. As the director of a school in Zacatecas stated, he did not deem it necessary to introduce any reform in his school or any change in the programme that he had been implementing for the past ten years –which, incidentally, did not include either civics or national history—, for the results that he had produced in that decade encouraged him to continue "the exact application of that programme."[79] The inclusion of history of Mexico within this context would have been an unnecessary addition. In a similar vein, numerous private schools omitted from their curricula the subject of national history, among other subjects, simply because, as it transpires from their prospectus, they sought first and above all else to provide religious and moral education. Anything else was considered probably useful, but nonetheless secondary.

Other private schools tended to model their curricula on the official study plan – albeit with the usual addition of religious instruction. Therefore, in states where history of Mexico was included in the official primary curriculum, private schools often required the study of the subject as well. Finally, there were those few private schools that emphasised the study of national history more strongly than any of the official schools. For instance, the Colegio de Santa María de Valenciana, in the state of Guanajuato, required the study of the history of Mexico from the second to the fourth year of its primary programme. The state law, in turn, included the subject only in its – non compulsory— "second epoch" of primary studies.[80] Similarly, the Colegio de Santa María de Guadalupe in Mexico City included the study of history of Mexico in

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[77] *Reglamento para las escuelas municipales aprobado por el Ayuntamiento y por el Gobierno del Distrito*. Mexico City, 25 Juanuary, 1870, *LAF* 1078.

[78] These states were Aguascalientes, Coahuila, Guanajuato, Jalisco, State of Mexico, Nuevo León, San Luis Potosí, Sinaloa, Veracruz and Zacatecas. Data based on Díaz Covarrubias, *La instrucción pública en México...*

[79] *Informe de los exámenes practicados en el establecimiento particular de educación primaria dirigido por Luis Galindo*, Zacatecas, Imprenta de Francisco Villagrana, 1871, p.4.

[80] *Colegio de Santa María de Valenciana, a media legua de Guanajuato, bajo la dirección del Presbítero Perfecto Amezquita*, Guanajuato, Impreso por Ignacio Hernández Zamudio, 1873; Díaz Covarrubias, *La instrucción pública en México...*, p.189.

three of the four years of its primary curriculum,[81] whereas the federal legislation did not demand the study of the subject at all, and the municipal legislation of the Federal District only required it in the fourth year of its primary cycle. As with other subjects, it is difficult to ascertain by just looking at the prospectus what the orientation of the history lessons in private schools was and whether it reinforced or disputed the liberal interpretation of the nation's past. What is evident, however, is that the appreciation of the relevance of national history as a subject of study in primary school varied enormously among the directors of private institutions. This, in turn, was translated into a very uneven spread of the study of the subject in private primary schools.

If the teaching of geography, civism and national history varied significantly between private and public schools in the primary cycle, in secondary and higher instruction it was not more uniform. The fact that secondary schools were much less widespread than primary institutions and that preparatory instruction was basically a domain of the state facilitates, moreover, the identification of the concrete points of convergence as well as of the differences between the teaching of those subjects in private and public establishments. A first glance at the curricula of secondary schools in the Restored Republic shows, for instance, that, except for some of the *Escuelas de Artes y Oficios* (technical schools), civic education was totally excluded from the programmes of public secondary schools.[82] As regards the other subjects, public secondary schools for girls tended to include "geography and history" in their study plans. Whether these subjects were taught with a particular focus on Mexico is, nonetheless, an open question. While it is clear that the programme of the federal secondary schools established in the law of 1867 included the study of "cosmology and physical and political geography, especially that of Mexico", the particular orientation that this subject had in the states is difficult to discern. Even more so is the orientation of the "history class". In fact, in 1874 only the secondary school for girls of the state of Sonora included a subject specifically called "history of Mexico" in its study programme.[83] In turn, private secondary schools for girls, which often existed in those states where no public secondary school had been founded, quite frequently conceived

[81] *Colegio de Santa María de Guadalupe, establecido en la Ribera de San Cosme, en la casa conocida con el nombre de "Los Mascarones", no.17, bajo la dirección del presbítero D. Agustín Fischer*, Mexico City, Imprenta de José Mariano Fernández de Lara, 1873.

[82] The *Escuela de Artes y Oficios* of Tecpan de Santiago, a school and reformatory institution at once, included constitutional right in its curriculum. Likewise, the students at the *Escuela de Artes y Oficios* of Tacubaya, were required to learn constitutional right and the rights of men. Díaz Covarrubias, *La instrucción pública en México...*, p.211-212; "Ecos de Tacubaya", *El Monitor Republicano*, 18 September, 1873.

of themselves as finishing schools and therefore concentrated on the teaching of languages, arts and "commercial branches", rather than on the more academic subjects. In the few cases where they did include the subjects that occupy us, they followed the official general formulation of "geography and history", which conceals the actual content of the programmes.

There existed, of course, exceptions, which are interesting because of their anecdotal value rather than for being representative of general trends. Before the restoration of the Republic, for instance, the *Academia Científica, Literaria y Mercantil* in the city of Veracruz included the study of "ancient history of Mexico until 1535" in its curriculum.[84] More telling perhaps, was the case of the *Colegio de la Reforma de Instrucción Secundaria* founded in 1862 by Carlos de Gagern[85] in Mexico City. Gagern claimed to offer an education "based on modern principles". This entailed dispensing with the teaching of religion and dogma and encouraging, instead, an inquisitive spirit among the students. Gagern regretted that many "eminently liberal" fathers, who had been "the most ardent apostles of the *Reforma*, [had] not [had] enough moral courage to provide their children with a liberal education." He further lamented the indifference with which the government, "exclusively occupied with destroying the remains of the vanquished faction, sorting its financial difficulties and preparing the defence of the *patria* against the foreign enemy" had treated the branch of public instruction. Thus, he offered to give his students a "reformist" education, which, by means of "sowing the seed of the *Reforma* in the hearts and intelligence of the youth", would prevent the surge of a new civil war. To that end, and "as the object of all education is to form at the same time men and citizens", in addition to the relevant subjects of political and social geography of Mexico as well as the special history of Mexico, the curriculum of Gagern's secondary school included the study of the "fundamental principles on which [Mexico's] political and social organisation rest[ed]."[86]

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[83] Díaz Covarrubias, *La instrucción pública en México...*, p.147.

[84] ["Informe sobre los establecimientos de Instrucción en la Ciudad de Veracruz"], 25 November, 1863, *AGN*, A:1863, s/c2.

[85] Carlos de Gagern was a Prussian officer who had been commissioned to aid in the reorganisation of the Mexican army after the war with the United States. Related to the liberal von Gagern family, who was notoriously active during the nineteenth century liberal revolutions in Germany, Carlos de Gagern himself adopted the Mexican nationality and vehemently supported the liberal cause. See: Carlos Gagern, "Discurso patriótico pronunciado por el C. [...] en el Teatro Iturbide de México, la noche del 15 de setiembre de 1862", *LAF* 136. For Gagern's appraisal of the Mexican army, see: Guy P.C. Thomson, "Los indios y el servicio militar en el México decimonónico. Leva o ciudadanía?" in Antonio Escobar Ohmstede (coord.), *Indio, nación y comunidad en el México del siglo XIX*. Mexico City, Centro de Estudios Mexicanos y Centroamericanos/Centro de Investigaciones y Estudios Superiores en Antropología Social, 1993, pp.211-212.

[86] ["Colegio de la Reforma de Instrucción Secundaria"], *El Siglo XIX*, 26 January, 1862.

While there was ample participation of the private sector in secondary education, preparatory instruction, i.e. that which prepared the students for entering the professional schools, was a relatively young area where the liberal state had taken the lead. Whereas shortly before the liberal advent to power there existed only sixteen "*colegios*" or further education institutions in Mexico,[87] after the restoration of the Republic and the 1867 foundation of the *Escuela Nacional Preparatoria,* public preparatory schools proliferated throughout the country and by the mid-1870s virtually all states of the federation possessed at least one of those schools. According to Minister of Instruction Díaz Covarrubias, in 1874 the number of public preparatory establishments was fifty four.[88]

The school which served as a model to the rest of the state-funded preparatory schools was the *Escuela Nacional Preparatoria.* From the outset, the curriculum of this institution included "physical and political geography, especially that of Mexico", which was later simply named "geography", and "chronology, general history and history of the country" as compulsory subjects for all the students.[89] However, although this was the model, not all the preparatory schools in the states required the study of such subjects. Interestingly enough, only the schools of the states of Campeche, Coahuila, Hidalgo, Morelos, Oaxaca, Sinaloa, Veracruz and Yucatán expressly followed the ENP in this respect.[90] That the curricula of the states' preparatory schools did not mention "national history" on their programmes does not mean, however, that this subject was completely excluded from the syllabus. Rather, it is likely that the general formulation "geography and history", which does occur in most of the cases, comprised the study of both geography and national history –as conceived in the ENP's plan. This point might be illustrated by the case of the *Instituto Literario del Estado de México*, Mexico State's preparatory school. In Díaz Covarrubias' report, the compulsory subjects of this establishment appear simply as "geography and history";

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[87] The "*departamentos*" (this was the name that the administrative units received during the centralist regimes) which counted with such schools were Aguascalientes, Chihuahua, Durango, Guanajuato, Mexico (District), Mexico (*Departamento*), Michoacán, Puebla, San Luis Potosí, Veracruz, Yucatán and Zacatecas. See: "Noticia de los Colegios establecidos en la República", 1855, *AGN*, Instrucción Pública y Bellas Artes, caja 359, exp.6.

[88] Díaz Covarrubias, *La instrucción pública en México...*, p.cxlv.

[89] The trajectory of the "history" course was far from smooth. In the 1867 Law of Public Instruction, which first established the curriculum of the ENP, the subjects of "general history", "chronology" and "national history" appear as compulsory. The 1868 curriculum however, dispenses with the teaching of "national history" and includes only "history" and "chronology". Finally, when courses at the ENP were inaugurated the three original subjects were conflated into one: "chronology, general history and national history". See: Meneses Morales, *Tendencias educativas oficiales...*, pp.204-210. The controversy surrounding the fusion of the three subjects is explored in chapter five.

[90] Díaz Covarrubias, *La instrucción pública en México...*

nonetheless, personal correspondence between Mariano Riva Palacio, the State governor and Gabino Barreda, director and intellectual creator of the *Escuela Nacional Preparatoria* provides evidence that at Riva Palacio's request, the curriculum of the *Instituto Literario* was made to follow exactly that of the ENP.[91] If that was in fact the case, then the students of the *Instituto Literario* must have learnt not only general geography and history, but also national history.

As was said earlier, preparatory instruction was a domain in which the state undoubtedly took the lead. Nonetheless there were a few private preparatory schools that competed with the public ones. Information on these schools is scant, but the available documentation shows that they tended to follow the curriculum of the *Escuela Nacional Preparatoria*. If they represented at all an alternative to state preparatory schools –and more specifically to the ENP— it was not because of the subjects that they taught, which were basically the same, but rather because, on most occasions, they offered to instruct the students within a Catholic environment.[92]

That private preparatory schools modeled their curricula according to the ENP's should come as no surprise if one takes into account that the goal of these schools was to prepare their students for entry into the professional schools –managed and funded by the central government—, which used the programme of the ENP as the standard of background knowledge their new recruits should possess. In this sense private preparatory schools resembled those of the states: they aimed to provide their students with at least as complete an education as that which the students of the ENP received, in order to equip them for entry in the capital's professional schools. It was in this context that private preparatory schools often stressed that their programmes corresponded to that of the *Escuela Nacional Preparatoria* and that express decisions to change the curricula and arrange them according to the ENP's took place.[93] Hence, since the ENP was the example most private preparatory schools followed, national

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[91] Gabino Barreda a Mariano Riva Palacio, Mexico City, 10 December 1870, Mariano Riva Palacio Collection, 8972, *BLAC*. Further indication that the curriculum of the Instituto Literario followed the ENP's is found in Felipe Sánchez Solís a Mariano Riva Palacio, Mariano Riva Palacio Collection, 8828, *BLAC*.

[92] The *Sociedad Católica Mexicana*, for instance, opened a preparatory school whose aim was to "compete with the *Escuela Nacional Preparatoria*, whose positivistic and lay curriculum preoccupied the Catholics." See Adame Goddard, *El pensamiento político...*, p.16. A later example is that of the *Instituto Científico* opened by Jesuits at the end of the century and whose publicity claimed that it offered the society of the capital "a school well founded on the solid bases of religion and morality [that provided] modern instruction", where the same curriculum of the ENP would be followed. Quoted in Torres, *La educación privada...*, p.61.

[93] See, for instance: *Colegio de Santa María de Valenciana...* and *Colegio de Santa María de Guadalupe....*

history and geography were almost always included as subjects in private preparatory curricula as were the other subjects which composed the official programme. In this sense, higher education was the only area of instruction where a certain uniformity between public and private schools existed.

The impact of private preparatory schools should not, however, be overestimated. For as was mentioned above, these schools constituted a small minority and could in no way be compared in their reach to public establishments and, more particularly, to the ENP, where not only Mexico City students, but also numerous students from all over the country received their education. What is interesting to note about private preparatory schools is that although they were, as most private instruction was, directed to a particular sector of society, namely the socio-economic elite of more traditional, i.e. Catholic persuasion, the content of their programmes corresponded to that of the public National Preparatory School. As was said earlier, the ENP was itself elitist if in a different way. While registration was open to all who could fulfill the academic requirements –and in this sense it was democratic—, it was mainly the sons of well-to-do families who could afford not to work and pursue preparatory and, ultimately, professional education. Moreover, since the ENP aimed to spread the doctrine of positivism and therewith to provide support for the liberal government, it attracted young men interested in politics and thus became the seedbed of Mexico's political elite. Interestingly then, the future elites of the country, be they socio-economic or political (which often, but not always coincided), were exposed to similar preparatory curricula.

Private education, therefore, contributed unevenly to the spread of the liberal idea of the nation. While the teaching of geography at all levels, i.e. primary, secondary and preparatory, spread and thereby reinforced the prevalent territorial conception of Mexico, the absence of any kind of civic instruction in the curricula of private schools hampered the emergence of the sense of community bound by rights and duties that the liberals wanted to instil in the younger generations. The pattern of the teaching of national history in private schools, in turn, resembled that of the public ones: it was irregular in the primary and secondary levels, but notably consistent in the preparatory cycle. While it is clear that there existed significant differences between the teaching of the subjects that were normally used as instruments to spread the idea of the nation in private and public schools, it is not yet apparent what the reach of these differences was. In other words, what still needs to be explored is the extent to which the school

population of the country was exposed to the differing programmes. The next part of this chapter aims to throw light on this subject.

4.5 Public schools vs. private schools: The balance

In 1875 Minister of Instruction José Díaz Covarrubias published his report on education in Mexico.[94] Based on information provided by the governors of the states of the federation, he aimed to produce a general statistic of public instruction in the Republic. Although a similar effort to systematise and compile data on education throughout the country had been made in 1869,[95] Díaz Covarrubias' report was, in fact, the first one to be published and preserved and, is therefore, the most complete guide to the state of public instruction in Mexico during the Restored Republic available to the researcher.

According to Díaz Covarrubias, in 1874 there existed 8103 primary schools in Mexico. This represented an enormous increase with respect to the 2424 computed in 1857,[96] at the dawn of the *Reforma* era, or even to the five thousand that Díaz Covarrubias himself estimated for 1870-1871.[97] François Xavier Guerra has argued that the increase of 62 percent in the number of primary schools in the 1870-1874 period that Díaz Covarrubias calculations suggests is implausible for various reasons, not least because of the chronic lack of resources that both state and municipal governments faced throughout those years. In Guerra's opinion the discrepancies in the figures might stem from a difference in the method employed in the count of the schools: while the 1870 –as well as the 1857— figures appear to have included only the federal and municipal schools, the 1874 ones also comprise the privately funded schools, both free and where tuition had to be paid.[98] Now, taking into account Guerra's observations and

[94] Díaz Covarrubias, *La instrucción pública en México....*
[95] On 10 November 1869 a circular was sent to all the states' governors requesting information on four categories: the number of primary schools (both private and public) and the number of students that attended those schools, the number of secondary instruction establishments, the number of libraries and museums and the number of scientific societies that existed in their states, which is the format Díaz Covarrubias would follow five years later to form his statistic. Unfortunately, only a very small proportion of the reports sent by the states in 1869 has been preserved. Although incomplete, the collection of documents provides interesting data on the state of education shortly after the restoration of the Republic. The available documents are collected in *AGN*, Instrucción Pública y Bellas Artes, caja 232, exp.25.
[96] Pérez Hernández, *Estadística de la República Mejicana*, ch.VII
[97] Díaz Covarrubias, *La instrucción pública en México...*, p.LXI.
[98] Guerra, *Le Mexique...*, vol.1, p.365.

re-calculating the number of schools accordingly, the actual increase in the number of public primary schools between 1870 and 1874 appears to be, although undeniably substantial, certainly more modest. For in 1874 the number of public schools, i.e., those funded by the federation, the states or the *municipios* and those which, like the Lancaster schools were publicly subsidised and therefore considered semi- or outright public, was around 6250, that is to say, 1250 more than in 1870 representing a total increase of 25 percent.[99]

Despite this positive evolution, the reach of public education was ultimately very limited. Out of a total school-age population of approximately 1'800,000 in 1874, only 299,493 children attended public primary schools. In other words, only 16.6 percent of the school-age Mexicans were being educated in establishments of the state. While this sum does reflect an increase of 4.7 percent with respect to the proportion of state-educated primary school pupils in 1857 (185,757 out of 1'557,408[100]), it remains rather low, even for the standards of the time.[101] Moreover, even if the number of children who attended private primary schools is added to the general total, the number of primary school pupils does not reach the mark of 20 percent of the total school-age population.

It is interesting to note that in Díaz Covarrubias' statistics the school-age population is considered to be that between six and thirteen years of age. In practice this demographic group would have included not only the children who attended primary school, but also a considerable part of those pursuing secondary and/or preparatory studies. Indeed, according to the 1869 by-law, primary instruction was compulsory from the age of five; the duration of the primary cycle was, in turn, four years. This means that entry to secondary/preparatory schools was, in theory, possible from the age of nine.[102] The available data group all the secondary, preparatory and professional students under one single category and thus do not make it possible to discern how many of those students in further education could in fact be counted within the group of "school-age population". Yet, even if the general total of students in

[99] Figures obtained by deducting from the total number of primary schools the number of private schools and schools sustained by the clergy, as well as for allowing an adjustment through the "unclassified" schools as provided by Díaz Covarrubias, *La instrucción pública en México...*, p.LXIV.

[100] Pérez Hernández, *Estadística de la República Mejicana*, chs.III and VIII.

[101] According to Díaz Covarrubias, the proportion of school-children with respect to the total school-age population in various countries was: just under 30 percent in Italy, just over 50 percent in Holland, over 25 percent in Greece and 75 percent in Austria. However, Mexico fared considerably better than Brazil, where only 10 percent of the school-age population effectively attended school. The full comparison in: *La instrucción pública en México...*, pp.LXXXII-LXXXIII.

further and higher education were included in the calculations, the variation of the figures would be negligible; for in 1857 the total number of further education students amounted to 0.3 percent of the school-age population and in 1874 it only rose to 0.6 percent. Whereas in relative terms this increase appears insignificant, in absolute terms it was, nonetheless, substantial: from a total of 6059 in 1857 the number of further education students grew to 11637 in 1874.[103]

Table 1. Primary school attendance in 1874

	Public	Private	Total
Number of schools	6405	1698	8103
Number of pupils	299494	49506 (approx.)	349000

Source: José Díaz Covarrubias, *La instrucción pública en México.*

There was therefore a palpable evolution in the area of public education since the liberals took power. But it was not only public instruction which saw considerable changes, private education also suffered an interesting transformation during that period. Unfortunately, no data on private education exist for 1857 to serve as a point of reference; we do know, however, that in 1836 53 percent of the primary schools were free Church and parish schools, 11 percent were municipal and 37 percent were private schools (although most probably the latter figure includes the number of Lancaster schools, which in this work are considered as public).[104] By 1874, in turn, public primary schools (i.e. those funded by the federation and the states, the *municipios* and private benefic societies) constituted 76.7 percent of the total of 8103, while private schools were just over 20 percent.[105] Interestingly enough, although private schools were around a fifth of the total primary schools in the country, they educated less than 15 percent of the school-going children.

[102] Although Díaz Covarrubias states that six to thirteen years "is the age of primary instruction" (p.LXXXI), nowhere in the country was the primary cycle longer than five years.
[103] The real increase might have been considerably larger, since the 1857 figures comprise the – unspecified—number of students of ten Catholic seminaries as well as the number of members of three "scientific and literary societies". The 1874 figures, in turn, are limited to secondary, preparatory and professional establishments and expressly exclude the 3800 students of the Catholic seminaries. Pérez Hernández, *Estadística de la República Mejicana*, ch.VII and Díaz Covarrubias, *La instrucción pública en México*, pp.CLV, CLVI, CLXXIV and CXC.
[104] Meneses Morales, *Tendencias educativas oficiales...*, p.144.

Now, as all aggregates do, these figures conceal significant differences between the individual parts. While the general rule appears to have been that there existed one private primary school for every four public ones, there were states of the federation where this ratio varied notably. For instance, in the states of Guerrero, Hidalgo, Sinaloa and Yucatán public schools constituted an overwhelming majority, fluctuating from state to state between 86 and 97 percent. In these states, only an average of one twentieth of the primary schoolchildren attended private schools.[106] At the other end of the spectrum, the states of Aguascalientes, Guanajuato, Jalisco, Michoacán and Querétaro had a considerably higher proportion of private schools than the aggregate for the country. Ranging from 51 percent in Aguascalientes to 39 percent in Guanajuato, these schools educated between one third and one fifth of their states' primary-school pupils.

Another case worth mentioning is that of the Federal District, which was the display window of the federal government's educational policies. A comparison between the number of public and private schools in the district in 1869 and 1874 yields very interesting results (Table 2). Firstly, the data show that between 1869 and 1874 the total number of primary schools grew from 284 to 350, that is an increase of 23.2 percent. In turn, the total number of pupils grew from 18,370 to 20,660, i.e., only 12.4 percent. This difference between the rate of growth of schools and pupils might point to the fact that the reasons for the low level of school attendance were more profound and complex than the simple lack of schools. As Guadalupe Monroy has noted, this was not an exclusive characteristic of the Federal District, but rather a hallmark of education throughout the country.[107] Secondly, the 1869 statistics indicate a high proportion of private schools: 39.08 percent of the total with a school population of 3660, which represented 19.02 percent of the number of primary school pupils in the district. Although the proportion of private schools diminished in the following years, it continued to be elevated: by 1874 it reached the sum of 36.28 percent. What is really noteworthy, however, is that despite the reduction in the share of private schools, the proportion of the pupils that attended these schools rose to nearly 25 percent. The magnitude of this difference becomes clearer when seen in the light of the following data: while between 1869 and 1874 the number of public primary schools increased by

[105] Díaz Covarrubias, *La instrucción pública en México...*, p.LXIV.
[106] The numbers of public and private schools were as follows: Guerrero 417-12, Hidalgo 413-66, Sinaloa, 262-17 and Yucatán 158-5. Based on Díaz Covarrubias, ibid.
[107] Monroy, "Instrucción pública", p.694.

28.9 percent and its school population by 11.11 percent, the number of private primary schools increased by only 14.41 percent, but its number of pupils grew by 47.9 percent.[108] On the one hand, this confirms the first observation regarding the need to look for an explanation of the low rate of school attendance beyond the sheer number of schools. On the other hand, taking into account that private schools –as understood in this work—mostly required the payment of fees and were therefore only accessible to the higher social echelons, this result points to the preference of the affluent classes for having their children educated in private establishments rather than in public schools. The increase in the average of private primary school pupils from 33 per school in 1869 to 42 per school in 1874 further shows that the demand for private education rose in a higher proportion than the supply of private schools did. It is difficult to know whether this increase in demand and population of private schools was gradual or sudden; yet it would not be far fetched to suppose that, once secularism in public education was instituted in Mexico, the children of the better-off flocked to private schools in search for a Catholic education.

Table 2. Public and private primary education in the Federal District: 1869 and 1874 compared

Year	Total number of primary schools	Number of public primary schools	Number of private primary schools	Total primary school attendance	Public primary school attendance	Private primary school attendance
1869	284 (100%)	173 (60.91%)	111 (39.08%)	18370 (100%)	14710 (80.07%)	3660 (19.92%)
1874	350 (100%)	223 (63.71%)	127 (36.28%)	21760 (100%)	16345 (75.11%)	5415 (24.88%)

Sources: 1869: "Noticia del número de escuelas de instrucción primaria que hay en el Distrito Federal con expresión del número de alumnos que concurren a cada una de ellas", *AGN*, Instrucción Pública y Bellas Artes, caja 232, exp.25 and 1874: José Díaz Covarrubias, *La instrucción pública en México.*

As regards further education, the available data can offer little guidance. Based on Díaz Covarrubias' estimates, only a rough approximation to the number of students enrolled in both public and private higher education schools in 1874 can be provided. In *La instrucción pública en México*, which records exclusively the number of public higher education establishments, the total number of students pursuing secondary, preparatory

[108] Based on the data provided in "Noticia del número de escuelas [...] en el Distrito Federal..."; and Díaz Covarrubias, *La instrucción pública en México...*, pp.198-201.

and professional studies is quoted as 9337.[109] Of these, 3551 students were registered in professional schools, which lowers the number of actual preparatory students to 5786.[110] Private preparatory schools educated, in turn a minimum of 930 students, as reported by the states' governments. Yet it is likely that the actual number might have been higher as there were private preparatory schools that were not recorded in Díaz Covarrubias statistics. Whereas *La instrucción pública en México* registers only one private preparatory school in Coahuila and none in Puebla, Valentina Torres has identified one preparatory school in Puebla and two in the city of Saltillo, Coahuila opened by Jesuit clergymen in the period 1870-1874.[111] Nonetheless, even if we take Díaz Covarrubias' estimate at face value –since it is practically impossible to know how many more private preparatory schools existed and, more importantly, what their student population was—the result is interesting, in that private preparatory schools educated nearly 14 percent of the total preparatory students in Mexico, that is to say one seventh of the total. This proportion, it will be recalled, is the same as the one represented by private primary school pupils.

In 1874 one seventh of the Mexicans was being educated in private schools, be it at the primary or the preparatory level. The remaining 86 percent attended public schools and were hence exposed to the liberal idea of the nation that through the teaching of civics, geography and history state schools disseminated. What is not yet apparent is the reach that these teachings had. An analysis of the data of public primary schools reveals that "civic education" was, by far, the most widespread with 199,769 pupils, that is 66 percent of the schoolchildren receiving it.[112] "National geography" and "history" were, in turn, much more limited in their scope: 136,215 (45 percent) of the pupils were taught "national geography" and 125,465 (42 percent) "national history". The rates in preparatory school were somewhat lower: while 2403 (41.5 percent) of the students attended "national history" classes, only 2197 (37.9 percent) had "national geography" as a subject of their preparatory studies.

A rough picture of education during the Restored Republic emerges from these data. Although it certainly needs to be refined and completed, this approximation

[109] Díaz Covarrubias, *La instrucción pública en México...*, p.CLVI. This number excludes the 2300 girls who attended secondary school as well as the students of the Catholic seminaries.
[110] Although the figure that results from adding the number of preparatory students as reported by the individual states is 4727. However, since it is not clear where the discrepancy might stem from, Díaz Covarrubias' estimate will be used here.
[111] Torres Septién, *La educación privada...*,pp.59-60.
[112] This proportion includes the 2567 pupils that the *Compañía Lancasteriana* reported to have in Mexico City in 1867. "Solemne distribución de premios", *Monitor Republicano*, 3 January 1868.

provides, nonetheless, suggestive clues about the role of the school, both private and public in the forging of the nation envisaged by the *Reforma* liberals. First, all the data show the constrained character of the education system in the 1870s. Indeed, despite the overall impulse that public education received after the restoration of the Republic in 1867, public instruction continued to be very confined as the proportion of the school-age population who actually received any formal education amounted to only a small fraction of the total. Within these restrictions, it was the state who mainly educated the Mexican children and youth. The fact that the reach of official education was very limited suggests, however, that as a means to institutionalise the liberal idea of the nation, the school was insufficient.

Secondly, the data reveal significant regional differences as regards the ratio of public/private schools. Particularly relevant to the spread of the liberal idea of the nation is the concentration of private primary schools in the states of Aguascalientes, Guanajuato, Jalisco, Michoacán and Querétaro. For, taking into account that private schools were mostly synonymous with Catholic schools, the presence of such a high proportion of private schools in these states suggests that in the classrooms of these regions the liberal conception of Mexico was in much closer competition with the Catholic view of both the world, and, by extension, of the nation. Without attempting to equate Catholicism with conservatism, I would like to point out that, as was seen in chapter two, the Catholic component was paramount to the conservative formulation of the nation. It is therefore likely that in these regions the children of the elite –for it was they who could afford private education—were socialised in a conception of Mexico along the Catholic/conservative lines. Furthermore, it would be possible to establish, as Guerra does, a correlation between education and socio-political behaviour insofar as it was those states with a high proportion of private/Catholic establishments that would exhibit a militant Catholic behaviour in the early 1900s. Interestingly enough, the states identified by Guerra as "regions of strong re-Christianisation" for 1910 are precisely those that in 1874 appeared to have the highest ratio of private schools.[113]

Thirdly, and related to the previous point, there appears to have been a social reaction to the educational onslaught of the liberal state. As the case of the Federal District shows, the demand for private schools increased considerably by 1874, that is

[113] Guerra refers specifically to the education provided by the Church, which spread considerably after the advent of Porfirio Díaz to power in 1876. He quotes the following figures of Church schools: Aguascalientes 17.33 percent, Michoacán 16.91 percent, Jalisco 16.4 percent, Guanajuato 11.32 percent and Zacatecas 8.22 percent. To this list Guerra adds the state of Colima with 12.7 percent. *Le Mexique...*, vol.1, pp.377-379.

after the Laws of Reform were added to the constitution thus rendering the teaching of religion in public schools illegal. The need for alternatives to official education, and more concretely, for Catholic alternatives resulted in a higher share of pupils attending private schools.

Finally, the data indicate that if there was a clearly identifiable way in which public education contributed to the diffusion of the liberal idea of the nation this was the teaching of the nation through civics. In accordance with the liberal conception of Mexico as a nation of institutions, rights and duties, public schools throughout the country aimed to instruct their pupils in the notions of citizenship and in the main political institutions of the Republic. It is also this aspect which, for the purposes of this work, more clearly distinguished official from private education, for civics as a subject of study was completely absent from private schools' curricula. To the pupils of private schools, therefore, the liberal idea of the nation as one of citizens remained unknown.

4.6 Final considerations

For the liberal elite of the *Reforma* and the Restored Republic education was a panacea: it was the instrument through which citizens were to be created and instilled with pride in Mexico's republican institutions and love of a *patria* stretching back to pre-Hispanic times. Still more important, education was, in the liberals' eyes, the vehicle by which the loyalty to the nation was to be gained. At the core of the liberals' educational efforts was, in fact, the old struggle against the values of traditionalism that the conservatives defended with arms until 1867 and, after the conservatives' defeat, the Catholic Church continued to embody. Faced with such an opponent, and despite its repeated enunciation of the principle of freedom of teaching, the liberal state elite increasingly intervened to assume control over public education in order to ensure that, at least in the publicly funded schools, the values of traditionalism would not be reproduced. Thus emerged, for the first time ever, the notion of a nation-wide public education system in which, federalism notwithstanding, the main policies and guidelines would be set by the federal government.

While the principle of freedom of teaching was applied idiosyncratically in the arena of public education, it was consistently upheld within private education. Protected by this principle, the defeated conservatives were able to establish the

Sociedad Católica Mexicana, by which they continued to disseminate in classrooms what they considered to be the real values of the Mexican nation. However, it would be inappropriate to see private education as exclusively a channel for the diffusion of conservative/Catholic values. If private education allowed the promotion of the traditionalist views of the *Sociedad Católica Mexicana*, it was also used –albeit exceptionally— as a vehicle for the dissemination of even more radically liberal views than the government itself dared to propound, as the case of the *Colegio de la Reforma* shows. On the whole, however, private schools were mostly a safe haven for the reproduction of Catholic values and constituted the only alternative for those Mexicans who opposed the secular orientation that public education increasingly acquired since the accession of the liberals to power.

Despite the liberals' constant enunciation of their commitment to education, the impact of the liberal administration's work in the area of public instruction was very modest. While public school attendance at both the primary and secondary/preparatory levels grew between 1857 and 1876, the fact that by 1874 less than one out of every five Mexicans of school age attended public school shows the limits of the liberals' efforts to create citizens through the school. This is not the place to explore the reasons for the low rate of school attendance during the Restored Republic –itself a topic that deserves much closer attention than it has hitherto received. Here it suffices it to say that in Minister Díaz Covarrubias' opinion the main causes were the dispersion of the Mexican population throughout the territory of the Republic; the fact that in nearly half of the states of the federation there had been no legislation to make primary education compulsory; the insufficient number of schools; and the "little inclination (*poca espontaneidad*) of the great majority of the uneducated inferior classes to procure primary instruction for their children."[114] The minister's diagnosis had interesting features in itself, such as the faith in the transforming power of legislation and the failure to recognise the socio-economic reality of most Mexicans, which could hardly be expected to give rise to an "inclination" on the part of the poor to send their children to school. Most importantly however, this assessment reveals that, at the end of the day, public instruction during the Restored Republic was concentrated mainly in the cities and received by the middle and lower-middle classes of Mexican society. It was, thus, the children of the urban middle-class who were mostly being formed into citizens through the public school.

[114] Díaz Covarrubias, *La instrucción pública en México...*, pp.LXXXIV-LXXXV

And in fact it was these children who were exposed to the curriculum that promoted the liberal idea of the nation. Like those pupils who attended private primary schools, they learnt in varying degrees about the territory of the Republic as a fixed representation of the country and about the history of a Mexico stretching back to pre-Hispanic times. However, it was only those children directly educated by the state who, through the teaching of a civic catechism, were made aware of the country's institutions and political sytstem. It was only they, therefore, who were familiarised with the notion of Mexico's being a civic community bound together by its laws and republican institutions.

In contrast, at the secondary/preparatory level public and private education tended to converge. Since it was the state that was in control of the professional colleges, it was also the state that was in a position to set the requirements for admission to those colleges. Thus, most private preparatory schools had to follow the curriculum of the *Escuela Nacional Preparatoria* if they wanted their students to be successful in the professional colleges. In this sense, students of both private and public preparatory establishments were exposed to the same subjects. This does not mean, however, that the idea of the nation they were imbued with was the same. True, civic education, the main instrument for the diffusion of the liberal idea of the nation in the primary cycle, was no longer a subject in the preparatory curriculum. Yet, the essence of the preparatory instruction provided by the state and embodied in the ENP was the spread of "positive knowledge", a notion that was defined in opposition to dogma and, thus, to religion. Insofar as public preparatory education aimed to diffuse positivism, it also sought to spread the anti-traditional values that would support the liberal regime and its conception of Mexico. Moreover, even if the subjects taught in private and public schools were nominally the same, different interpretations and points of view could be diffused through the textbooks that each of the schools used. The analysis of the contents of such books offered in the next chapter provides a detailed picture of the ideas of the nation pupils and students in private and public schools were being taught.

CHAPTER 5

TEACHING THE NATION: CIVICS, GEOGRAPHY AND HISTORY

"[...] Either a heritage of colonial times or written in foreign languages" is how Ignacio Ramírez described the works that were being used as textbooks in public schools around 1868.[1] In voicing his displeasure with the existing textbooks, Ramírez was representative of the views of numerous Mexicans who were concerned about the inadequacy of the methods and material used to educate the Mexican children and youth. For one, the liberal government itself was aware of the shortcomings of the available textbooks and had, since 1861, tried to encourage the publication of books that would satisfy the needs imposed by the new public education programmes.[2] Such needs arose, no doubt, as a consequence of the measures taken to modernise public instruction; however, they were far more than mere pedagogical requirements. Above all, these needs were dictated by the demands that a newly emerging notion of "national education" brought with it. As Gabino Barreda stated:

> [The new educational] plan [...] bears the need of having a set of textbooks that be adequate to [the plan's] goals and be written with the same spirit and under the influence of the national genius and of the true national needs, instead of resorting, as has been done hitherto, to foreign works, which are often superficial and almost always incoherent and contradictory, and above all else, inspired by another genius and other social needs.[3]

Textbooks that reflected the Mexican reality and national character and that were therefore accessible and meaningful to the young Mexicans was what in the view of the liberals in power must complement the educational reforms. For only with the aid of

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[1] In Martín Luis Guzmán (ed.), *Escuelas laicas, textos y documentos*, Mexico City, Empresas Editoriales, 1948, p.152.

[2] Article 49, *Ley sobre la instrucción pública en los establecimientos que dependen del gobierno general.* 15 April 1861, *AGN*, Instrucción Pública y Bellas Artes, caja 372, exp.5; and chapter 5, *Ley orgánica de instrucción pública para en Distrito Federal*, 2 December 1867, quoted in Ernesto Meneses Morales, *Tendencias educativas oficiales en México 1821-1911. La problemática de la educación mexicana en el siglo XIX y principios del siglo XX*, Mexico City, Porrúa, 1983, p.177.

[3] Gabino Barreda, *Carta dirigida al C. Mariano Riva Palacio, gobernador del Estado de México, por el C. [...], director de la Escuela Nacional Preparatoria, en la cual se tocan varios puntos relativos a la instrucción pública*, Mexico City, Imprenta del Gobierno en Palacio, 1870, p.35.

such books could the dogma-free, modern and egalitarian education that the liberal state aimed to provide be conducive to the emergence of a nation of citizens, who would be, before anything else, Mexican citizens.

Be it as a response to the government's appeal or because after the return of peace, the restoration of the Republic and the impulse that public instruction received the production of new teaching material appeared as a promising business, the fact is that since 1867, but more notably since 1870, a number of textbooks written by Mexican authors began to appear on the market. Whether these books reflected the "national genius and needs" as Barreda wished is a matter of interpretation, for nowhere was it made clear what such genius and needs specifically were. Nonetheless, what is undeniable is that all these books were directed to a Mexican audience and were therefore designed to both appeal to and influence it. Indeed, the new textbooks were not only written in Spanish –long considered the national language—, but they also transmitted messages to which the Mexicans were receptive. In other words, to paraphrase Eric Hobsbawm, they were broadcast on a wavelength to which –the authors supposed—, the Mexican public was ready to tune in.[4]

Now, the "Mexican public" was far from being homogenous. As this thesis had pointed out, even after the defeat of the imperial forces by the liberal army and the return to the republican order, Mexican society was divided in its views about politics, about religion and about the nation that Mexico was or should be. This in turn means that different sections of the "Mexican public" were receptive to different types of messages, not least those which the school textbooks aimed to transmit. It is precisely those messages which constitute the subject of the following pages. By looking at the works that were used as textbooks during the Restored Republic, this chapter aims to throw light on the role these books might have played in disseminating both the liberal, "official" idea of the nation and alternative ideas in line with the conservative conception. As in chapter four, the focus here will be on the subjects of civic education, national geography and national history. More specifically, the content of the textbooks of these subjects will be analysed through the looking-glass of the features of the conservative and liberal ideas of the nation that were identified in chapters two and three; namely, the pride in the Spanish origin and the centrality of Catholicism to the Mexican nation, in the conservative case, and the importance of institutions and laws, the popular dimension and the continuity with the Aztec past, in the liberal case. In a

further attempt to elucidate the reach of these works and the idea of the nation they put forth, this chapter identifies, whenever the available information allows it, the particular texts that were used in private and public schools.

5.1 The teaching of civics

Civic education was, as was stressed in chapter four, at the core of the liberal conception of public instruction; for it was through learning about the rights and duties of the citizen, about the institutions and about the laws of their country that Mexican children would become the good citizens that the civic nation envisaged by the liberals required. It is therefore surprising that, despite occupying such a high position in the educational priorities of the liberal design, during the Restored Republic only one contemporary textbook existed to instruct the children in civics. Nicolás Pizarro's *Catecismo político constitucional*[5] was, in fact, the only work written during the *Reforma* period with the aim of introducing the Mexican children to the notions of citizenship as well as to the peculiarities of the legal and institutional characteristics of *Reforma* Mexico.[6]

Through succinct questions and answers, a format that all catechisms follow, Pizarro's work sets out to instruct Mexican pupils in two basic areas: the [Mexican] constitution and the "sovereignty in general and the form of government" (1861:43). To that end, the book looks into the rights of man as stated in the 1857 constitution, the federal system, the division of powers and the Laws of Reform. While clearly focused on the Mexican case, the *Catecismo* touches upon, albeit only superficially, abstract notions such as "right", "duty" and "citizen of a nation" (1861:36-37). Nonetheless, it is undoubtedly the particular features of the Mexican legal and political system which provide the framework in which these general notions are explained and which ultimately concentrate the attention of the work.

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[4] Eric Hobsbawm, "Mass-Producing Traditions: Europe, 1870-1914" in Eric Hobsbawm and Terence Ranger (eds.), *The Invention of Tradition*, Cambridge, Canto/Cambridge University Press, 1992, p.263.

[5] Two editions of this work were consulted: Nicolás Pizarro, *Catecismo político constitucional escrito por [...]*, Mexico City, Imprenta de N. Chávez, 1861 and *Catecismo político constitucional escrito por [...]*, 5th ed., Mexico City, Imprenta "Universal" de Vapor, 1887. The quotes in the text are taken from the 1861edition.

[6] Earlier works addressed specifically to the Mexican people with the aim of instructing them in notions of civics were Wenceslao Barquera's *Lecciones de Política y Derecho Público para la Instrucción del pueblo mexicano*, Mexico City, Imprenta de Doña Herculana del Villar y Socios, 1822 and Manuel E. Gorostiza's *Cartilla Política*, London, Oficina de Santiago Holmes, 1833.

Beyond providing political instruction, however, the overriding aim of the book seems to be gaining the young over to the liberal camp by presenting a black and white picture of the liberal-conservative struggle. Undeniably a product of its time, the *Catecismo* is fiercely anti-clerical, although not anti-religious, and uncompromisingly partisan of the *Reforma*. It therefore comes as no surprise that Pizarro's *Catecismo* presents in its approach to the different subjects it deals with, many of the features that characterise the liberal idea of the nation.

Being a manual for political education, the work focuses on different aspects of the law and of Mexico's institutional framework. In agreement with the liberal conception, the law or, to be more precise the constitution, appears in Pizarro's work as the best guarantee of society. Moreover, for Pizarro, the 1857 constitution was inextricably linked to the nation's past in that it was the product of Mexico's "half a century-long struggle to attain her independence and ensure her liberty" (1861:5) and therefore a unique result of a unique historical process. In establishing "the way in which [the] nation [was] to be ruled" (1861:6), the constitution guaranteed, according to Pizarro, that the history of foreign domination and internal strife that Mexico had suffered would not repeat itself; it guaranteed, furthermore, that justice and liberty would thenceforward rule. The past and the future of the nation were thus connected, in Pizarro's eyes, through the fundamental code.

The popular dimension, an important element of the liberal idea of the nation, is present in the *Catecismo* as well. As could be expected from a belligerently liberal text, the *Catecismo* extols democracy and the principle on which it is based, i.e. "[the] recognition of the natural rights of all men" (1861:8). However, the topic of popular sovereignty itself is not only marginally but also inconsistently presented in the text. For in Pizarro's account, popular sovereignty, which the author equates with national sovereignty, appears subordinated to divine sovereignty: "The nation itself –states the *Catecismo*— is not sovereign but to ensure that morality and justice, eternal laws that have been imposed on all societies by the Creator of nature, by the true and only sovereign, prevail" (1861:43). Having stated that the Creator was the true and only sovereign –in absolute terms— Pizarro explains that there exists yet another type of sovereignty that could be understood in the context of "national power, of the independence [of a people] *vis-à-vis* other peoples" (1861:44). This was the national sovereignty, which could be defined as "the high and supreme right that nations have to see to their own happiness" (1861:46). After making this distinction the *Catecismo*

reproduces article 39 of the 1857 constitution, where the doctrine of popular sovereignty is enshrined.[7] Notwithstanding, the enunciation of article 39 does not lead to a discussion of the concept of popular sovereignty, but rather to a diatribe against the conservatives and to praise of the liberals. Indeed, in an *ad hoc* approach to the topic of popular sovereignty, Pizarro states that the privileged classes around the globe rejected the doctrine of popular sovereignty because they wanted the "exclusive enjoyment of invaluable goods". This resulted, according to the *Catecismo*, in a struggle that divided men into two bands: the *serviles* (a pejorative term used at the time to refer to the conservatives) and the liberals. The former were aided by "the high dignitaries of the church hierarchy, the rich who exploit[ed] the poor without any consideration [and] the vicious people who [did] not want to work". The liberals, in turn, found their supporters among "the poor clergy, the middle classes [...] and that generous youth who hurls itself into combat without thinking about the pay and who does not seek other reward than the glory of having contributed to the triumph of justice and law" (1861:45).

There is, thus, little that Mexican pupils could learn in Pizarro's book about the philosophical content of the term "popular sovereignty" or about its political implications. Nonetheless, through the *Catecismo* the children and young were familiarised with two notions that were particularly useful to the liberals in arms: for one thing, they learnt that, according to the constitution, the people had a right to govern themselves; for another, they were told that the clergy, the rich and the lazy opposed this right. Being presented with a black and white picture of liberals and conservatives, the children were hence being invited to join the liberal cause and defend the rights of the people.

The third element of the liberal idea of the nation, what in chapter three has been called "the ethnic substratum" appears in the *Catecismo* as well, as throughout the text several references are made that imply a continuity between the Aztec people and the Mexican one. Thus, for instance, in addressing the topic of the death penalty, Pizarro states: "The conquerors of our soil left us the wicked practice of killing all great delinquents" (1861:27). This assertion not only points to Pizarro's anti-Hispanism, which blamed the death penalty –undesirable in his eyes—on the Spanish heritage, but also implies a continuity between the contemporary Mexicans and the pre-Hispanic peoples in the expression "the conquerors of our soil". Overall, however, the *Catecismo*

[7] "National sovereignty resides essentially and originally in the people. All public power emanates from [the people] and is instituted for their benefit. The people have at all time the inalienable right to modify or alter the form of their government"; quoted in Pizarro, *Catecismo político...*, 1861, p.44.

does not see the Aztecs as the sole forefathers of the Mexican people. Rather, while it certainly establishes a continuity between the contemporary Mexicans and the pre-Hispanic peoples, the *Catecismo* also accommodates the New Spanish *criollos* and the generations that followed the conquest in the genealogy of the Mexican nation. This is evidenced in assertions such as the following, made in the context of the exposition of the Laws of Reform:

> [...] On the day that the priests proscribed [liberty, law and justice] in the New World, just as they had done in the Old one [...] humankind must have moaned even more painfully than with Huitzilopochtli's sacrifices,[8] since it was two peoples who were being sacrificed: the indigenous people of rough trunk full of sap in which civilisation was grafted [was sacrificed to] the rapacity of the Spaniards; and the subsequent generations [who were sacrificed to] the religious intolerance, which chained the spirit of the Mexicans for three centuries (1861:61).

In this interpretation, therefore, the Mexicans had been free, yet with the conquest their spirit had been chained and it remained so during the three centuries that the colonial rule lasted. The identification between the Aztecs and the Mexicans in this statement is clear. Interestingly, however, from Pizarro's viewpoint the Aztecs were not the only ones who were worthy of being included in the genealogy of the Mexican nation. The fact that the "subsequent generations", who Pizarro considered to be a "different people" from the Aztecs, should also be part of the Mexican lineage points to the author's belief that the contemporary Mexicans were not exclusively descended from the Aztecs. Although obviously far from suggesting that those "subsequent generations" had been the product of the mixture between the Aztecs and the Spaniards, as the *mestizo* myth would later propound, the *Catecismo* recognised the existence of a New Spanish society different to the indigenous one to which the contemporary Mexicans were related. In a similar vein, in a reference made to justify the Laws of Reform, the *Catecismo* alludes to the parallel existence of Aztecs and *criollos*, whose –separate—liberties, which had been suppressed by the clergy, had been reborn together after the *Reforma* to be deposited in the Mexican people.

[8] Huitzilopochtli, the war-god, was the main deity in the Aztec pantheon. During the festivities in his honour human sacrifices were performed.

> The religion of the Crucified was implanted in Mexico through the joint action of Cortés' sword and the inquisitors' incense burner. The political liberty of the Aztecs and of the *criollos* as well as their religious liberty were consumed in the same fire, in the fire that Zumárraga started with the archives of Tenoxtitlan;[9] it was natural that they should be reborn together. This is what has happened (1861:61).

Pizarro's *Catecismo* suffered, no doubt, from many conceptual inconsistencies. Nonetheless it did provide the liberal educators with an instrument to both proselytise and familiarise the children with the main features of the political system that the liberals so passionately defended. As soon as it was published, the work was praised for "its literary merit [and] patriotic tendencies" by the liberal government and adopted as the official textbook for the subject of civics in federal schools.[10] By 1869 the reading of the *Catecismo político constitucional* was still compulsory in the public schools of some states, as the case of Oaxaca proves.[11] Furthermore, as late as 1887 the book was still being published with virtually the exact same content as the first edition. This suggests not only that there existed a considerable demand for the work, but also that the message it transmitted was still seen as appropriate for introducing the future citizens of Mexico to the liberal principles that should be at the basis of the Mexican nation.

5.2 The teaching of national geography

If the teaching of civics had the clear goal of familiarising the young Mexicans with the main institutions and laws of their country, the teaching of geography aimed, in turn, to provide them with the necessary knowledge to locate their country in the globe and to instruct them about the main physical characteristics of the territorial entity called Mexico. But the geography class offered more than the simple opportunity to talk about maps, mountains and rivers. It also afforded a setting in which the love of the soil could be instilled in the new generations. Indeed, be it through the romanticisation of the

[9] Juan de Zumárraga was the first archbishop of Mexico. Shortly after the conquest and in his zeal to eradicate idolatry and instruct the indigenous populations in the Catholic faith, Zumárraga ordered the collection of all Aztec manuscripts and burned them in a great fire.

[10] Ignacio Ramírez a Nicolás Pizarro, Mexico City, 15 March 1861; reproduced in Nicolás Pizarro, *Catecismo político constitucional escrito por [...]*, 5th ed., Mexico City, Imprenta "Universal" de Vapor, 1887, p.3.

[11] "Noticia sobre la instrucción pública en el estado de Oaxaca", 1 December 1869, *AGN*, Instrucción Pública y Bellas Artes, caja 232, exp.25.

landscape that was to be considered national, through extolling the splendour and wealth of the national soil, or through a concerted effort to "naturalise the territorial realm considered as legitimately appropriated",[12] the fact is that the teaching of geography provided then, as it continues to do today, ample scope for the transmission and dissemination of the idea of the nation.

During the Restored Republic both world and the particular geography of Mexico were taught in most schools through the works of two Mexican authors: José María Roa Bárcena and Antonio García Cubas. Prior to the appearance of their textbooks in the late 1860s only one title written by a Mexican existed to teach general geography.[13] For "particular geography of the country", in turn, no work existed. A reason for this might have been that, "national geography" was, after all, a subject of recent adoption. As a matter of fact, although plans to create a general map of the Republic existed since 1824, it was not until 1850 that a –still inaccurate—map of the entire Mexican territory was completed, and until 1863 that the first reliable map, Antonio García Cubas' *Carta General de la República Mexicana*, was published.[14] In the face of a still uncertain cartographic representation of the country it was difficult to conceive of teaching national geography.

Moreover, although the subject of "geography of Mexico" was included in the syllabus of the secondary school for girls in 1856, it was really since 1867 and its inclusion among the compulsory subjects for the primary cycle in federal primary schools that the subject received widespread attention. It was also then that Roa Bárcenas' and García Cubas' texts that dominated the area of teaching of geography, as both authors produced not only textbooks for geography of Mexico, but also for world geography, which always comprised a –sometimes long and detailed, sometimes short and general— section on Mexico. It is the content of these books and of the relevant parts on Mexico that constitute the focus of the following pages.

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[12] Marcelo Escolar, Silvina Quintero Palacios and Carlos Reboratti, "Geographical Identity and Patriotic Representation in Argentina", in David Hosoon (ed.), *Geography and National Identity*, Oxford, Blackwell, 1994, p. 348. Benedict Anderson also looks at the importance of the geographical representation of the nation through maps in his *Imagined Communities, Reflections on the Origin and Spread of Nationalism* (revised edition), London, Verso, 1991, pp.170-178.

[13] Juan N. Almonte, *Catecismo de geografía universal para el uso de los establecimientos de instrucción pública de México por [...]*, Mexico City, Imprenta de Ignacio Cumplido, 1837.

[14] Víctor M. González Esparza, "Patriotismo vs. nación: Nueva Galicia y los orígenes del estado nacional en México", paper presented at the IX Congreso de Historiadores Canadienses, Mexicanos y de los

5.2.1 The works of José María Roa Bárcena

In 1861 the first edition of José María Roa Bárcena's *Catecismo elemental de geografiía universal con noticias más extensas y una carta de México*[15] saw the light. Conceived specifically as a textbook of general geography for the primary cycle, the *Catecismo* contained an extensive section on the geography of Mexico, on which, according to its author, "almost no instruction had been until [then] imparted to the children" (1869: "Advertencia"). It was thus, with the specific aim to fill a gap in the existing literature for elementary instruction that Roa Bárcena wrote the seventy-four pages dedicated to Mexico in his *Catecismo*.

Dealing with topics as diverse as boundaries, climates and productions, "races", languages, form of government, public instruction and history, as well as the specific geographical characteristic of each of the states of the federation, the *Catecismo* offers a broad panorama of Mexican geography in which no occasion is missed to refer to the beauty and richness of the land, thereby providing numerous opportunities to instil in the children pride in their soil. In this context, for instance, the *Catecismo* asserts that "in addition to gold and silver, extracted here with much more abundance than in any other country, in our country there is iron, copper, mercury, tin [...]" (1869:111). Similarly, in referring to the Mexican flora, the work states: "the Mexican soil is one of the most fertile in the world and the immense variety of its climates renders the variety of its plant kingdom equally infinite" (1869:112). It was thus, not only Mexico's richness and abundance in absolute terms that the *Catecismo* highlighted, but more importantly, its wealth in comparison to other countries. The idea that Mexico was one among other similar entities and that it was more resourceful than any of them was in this way conveyed to the children, thus affording them with a reason to feel proud of and attached to the soil in which they had been born and lived.

Beyond the descriptions of the physical space, that the *Catecismo* was the work of a convinced conservative[16] is evident throughout the text. On the one hand,

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Estados Unidos, Mexico City, October 1994; quoted in Timothy Anna, *Forging Mexico, 1821-1835*, Lincoln and London, University of Nebraska Press, 1998, p.100.

[15] The following quotes are taken from the fourth edition of the work: José M. Roa Bárcena, *Catecismo elemental de geografia universal con noticias más extensas y una carta de México. Formado con vista de las últimas obras y propio para servir de texto a la enseñanza elemental de la geografia en nuestros establecimientos de instrucción pública.* 4th ed., Mexico City, Eugenio Maillefert Editor, 1869.

[16] Roa Bárcena was an active member of the Conservative Party and was, furthermore, elected as a member to the *Asamblea the Notables* that in 1863 offered the throne of Mexico to Maximilian of Habsburg. See: Jorge Adame Goddard, *El pensamiento político y social de los católicos mexicanos, 1867-1914*, Mexico City, UNAM, 1981, p.7 and "Decreto sobre la formación de la Asamblea de

favourable mentions of Catholicism occur repeatedly in the pages of the book. For instance, in the section devoted to the United States of America the author states: "In the USA there is full toleration of cults and Catholicism makes new and important progress every day" (1869:87). More tellingly perhaps, when referring to religion in Mexico, the *Catecismo* asserts that the "religion of the country [is] the Roman, apostolic, Catholic one, with toleration of other cults" (1869:114). The fact that Catholicism –or any other cult, for that matter—was not the official religion in Mexico does not deter Roa Bárcena from almost presenting it as though it were so. Moreover, this assertion becomes even more powerful in the face of the lack of an official religion, for it implies the existence, beyond the law or any other government disposition, of an basic characteristic of the entity called Mexico. It was through statements like this that the Roa Bárcenas' *Catecismo* rehearsed the conservative interpretation of Mexico as a Catholic community.

On the other hand, the *Catecismo* presents the pro-Spanish inclination that distinguished Mexican conservatism. In this vein the text states that Spanish domination made of Mexico "a flourishing and rich colony where the light of Christianity was spread among the Indians" (1869:122). Again, religion comes to the fore, although this time within the context of the beneficial character of Spanish rule. As was characteristic of conservative thought, Roa Bárcena's support of the Spanish project was accompanied by a disdain for what, in the eyes of the conservatives, appeared as the opposite of such project; i.e. the United States and its own ways and policies. A certain dose of anti-Americanism, is therefore present in the *Catecismo*. While undoubtedly moderate, the contempt for the Americans is nonetheless manifest in statements that refer to the 1846-1848 Mexican-American war (1869:87, 122).

In agreement with mainstream conservative thought, the *Catecismo* fails to establish any kind of continuity between the pre-Hispanic peoples and the contemporary Mexican nation. If Roa Bárcena describes the indigenous populations as "the remains of the diverse tribes that populated this part of America before the conquest" (1869:114), he takes pains to divide very clearly the pre-Hispanic past from the period that began with the Spanish conquest. Hence, the work mentions "the most notorious antiquities of the country" (1869:120), i.e. the pre-Hispanic monuments, and refers to the heroism of Cuauhtémoc, the last Aztec king (1869:122), but makes it clear that these monuments and events occurred in "the ancient Anáhuac, comprised within

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Notables" 29 June, 1863, reproduced in Rafel Tafolla Pérez, *La Junta de Notables de 1863,* Mexico City,

our current territory" (1869:120). It was hence the geographical coincidence which justified the reference to the pre-Hispanic past and not a link between those peoples and events with the Mexican present.

As was mentioned above, the *Catecismo* does not deal exclusively with the geography of the country, but also includes a brief section on "historical events" in which the conservative interpretation of Mexican history is constantly palpable. For, in addition to the already mentioned disconnection between the pre-Hispanic past and the Mexican present, the positive views about the colony, and the mild but clear anti-Americanism, the book presents independence as the merit of Agustín de Iturbide rather than of Miguel Hidalgo (1869:122) and portrays the years that followed Iturbide's overthrow as a period of chaos where "the chiefs of the different bands who [took] care of public administration exercised a discretionary power" (1869:114). As could be expected from a work written by a supporter of the defeated second empire, in the last pages of the *Catecismo elemental de geografía universal* a mention is made of the French intervention, "under whose shade the Empire was erected" (1869:123), as well as a reference to the republican triumph, "after which the old form of government was re-established" (1869:123). The neutrality and uncritical character of these allusions, made only two years after the liberal triumph, might well have been the product of the resignation of a conservative living in a liberal, republican Mexico.

Overall, the pages dedicated to Mexico in Roa Bárcena's *Catecismo* provide a general idea of Mexico's physical geography, which is portrayed as being of particular richness, abundance and beauty therefore eliciting admiration and pride. It is, in turn, in the sections regarding human and political geography that the conservative tendency of the text becomes most apparent especially in its stress of the Catholic character of Mexico. These features must have been present as well in the *Catecismo elemental de geografía de la República Mexicana* that Roa Bárcena published in subsequent years. Unfortunately, no original edition of this work was available for consultation, but it is clear that it was a successful book, for it was reedited several times, and even after Roa Barcena's death, Ignacio Molina, lecturer of geography at the *Escuela Nacional Preparatoria*, was entrusted with the task of updating and revising the work. By 1884

Jus, 1977, pp.83-90.

the *Catecismo elemental de geografía de la República Mexicana* was running its eighth edition.[17]

Although the lack of an original edition precludes the analysis of this *Catecismo*, a look at Molina's revision offers a glimpse of what the original content of the book may have been. On the whole, the work appears to have followed the same structure as the section on Mexico of the *Catecismo elemental de geografía universal.* As could be expected, however, most of the comments and assertions that in Roa Bárcena's *Catecismo* evidenced a conservative orientation were either moderated or altogether dispensed with in Molina's follow-up. Yet, it is precisely Molina's modifications which make it possible to identify elements that may have been present in the original edition. Thus, the fact that in referring to the boundaries of the country Molina's text includes a mention of the loss of territory as a result of the "war of invasion of the USA", (1884:5) suggests that Roa Bárcena's version covered this aspect as well. Similarly, with regard to Catholicism, in a reformulation of Roa Bárcena's statement about the religion of the country Molina's text asserts "there is no official religion in the country and although absolute toleration of cults exists, Catholicism predominates" (1884:10).

As has already been said, Roa Bárcena's works on geography enjoyed wide acceptance in Mexico's educational world. While the conservative orientation of their author rendered these textbooks appealing for use in private/Catholic schools –we know, for instance that the Instituto Literario de Jalapa, a private secondary school, adopted one of Roa Bárcena's works as a textbook for the subject of geography of Mexico[18]--, it did not constitute an obstacle to their being used in public schools, as the case of Oaxaca proves.[19] Together with Antonio García Cubas' works, the textbooks written by José María Roa Bárcena would instruct the Mexican children and youth in the geographical features of "their country" for many decades and would contribute to inculcating in them a sense of pride in belonging to that particular country.

[17] Ignacio Molina, *Catecismo elemental de geografía de la República Mexicana por el ingeniero [...], Profesor de Geografía y Cosmografía de la Escuela Nacional Preparatoria, Obra escrita para la 8a. edición de la Geografía de Roa Bárcena*, Mexico City, Imprenta de Aguilar e Hijos, 1884.
[18] *Instituto Literario de Jalapa*, December 1869, *LAF* 1074.
[19] "Noticia sobre la instrucción pública en el Estado de Oaxaca" (1869).

5.2.2 The works of Antonio García Cubas

Reputed to be the best Mexican geographer of his time, Antonio García Cubas produced various works on general and Mexican geography, two of which were specifically conceived as textbooks: *Compendio de geografía universal para uso de los establecimientos de instrucción primaria*[20] and *Elementos de geografía de los Estados Unidos Mexicanos*.[21] In stark contrast with José María Roa Bárcena's textbooks, the works of Antonio García Cubas are not only free of any kind of nationalistic remarks and statements that could reveal a specific political orientation, but they are also essentially objective and strictly limited to dealing with the geographical characteristics of the subject in question.

In the case of the *Elementos de geografía*, the volume devoted specifically to the geography of Mexico, for example, only the first eight pages of the thirty-eight-page-volume are dedicated to the geography "of the country in general" (n/d:1), while the other thirty summarise the main geographical features of each of the states of the federation. In those eight introductory pages, García Cubas sweeps through the topics of borders, territorial extension, number of inhabitants, political division, mountains, rivers, climate, produce, industry and ports without ever making a value-judgment and resorting only exceptionally to the use of adjectives to qualify his descriptions. Moreover, even in the rare cases where García Cubas uses positive adjectives to describe a feature of the Mexican geography, he does so in such a way that no further intention can be attributed to his statements. For instance, the *Elementos de geografía* mentions the "beautiful valleys and fertile ravines" (n/d:4) of the Mexican territory as well as the "fine construction woods [and] the exquisite fruits" (n/d:6) cultivated in different parts of the country. It is perhaps the absence of a comparative dimension that renders these allusions so neutral, as they do not refer to the beauty and richness of Mexico *vis-à-vis* other countries, but rather to these characteristics in isolation.

The same could be said about the *Compendio de geografía universal*, which is essentially descriptive and devoid of value-judgments. In fact, topics that by their nature could be treated in a partisan way are dealt with in this work impartially and, one

[20] Two editions of this book were consulted: Antonio García Cubas, *Compendio de geografía universal para uso de los establecimientos de Instrucción Primaria*, 2nd ed., Mexico City, Imprenta de la calle cerrada de Santa Teresa, 1871 and *Compendio de geografía universal para uso de los establecimientos de Instrucción Primaria*, 9th ed., Mexico City, Imprenta de Murguía, 1890.

could argue, even aseptically. A brief reference to the way in which García Cubas approaches the subject of "forms of government" might help to illustrate this point. In the section devoted to the forms of government García Cubas asserts:

> The reunion of many tribes, subject to a single authority and laws constitutes the state or nation, whose forms of government vary, the following being the most important of them: theocracy, monarchy, republic [...]. The republic is the institution that does not permit the exercise of power by a single man, but rather by several individuals elected by the people and constituted in three powers: the legislative, the executive and the judiciary. If people of the higher classes are elevated to these [powers] the republic is aristocratic; if for the exercise of power the election falls indifferently on the individuals with no exclusion of class, [the republic] is democratic (1890:52-53).

From this excerpt not only is the equation between state and nation interesting, but so is the way in which the republican form of government, i.e. the one reinstated in Mexico after the 1867 liberal triumph, is presented. For like the other systems, the republic is looked at as one among many other forms of government and possessing no intrinsic advantages or disadvantages over any of the rest. This detached and impartial treatment of the diverse subjects touched upon in the *Compendio* is what characterises García Cubas' works.

Of the 190 pages that form the *Compendio* forty-one are devoted to Mexico. As in the rest of the book, the tone used in this section is descriptive and the use of adjectives sparse. And while mentions of the "beautiful valleys and ravines" (1890:71), the "fertile plains" and the "leafy woods and virgin forests that contain precious construction woods, medicinal plants and exquisite fruits" (1890:73) occur, just as in the *Elementos de geografía*, they do not appear to be intended to place Mexico's richness or beauty above that of any other country, as similar references are made in the description of other areas of the world. Nicaragua, for instance, is described as a "rich and beautiful country" (1890:112) and the United States is said to have an "extremely fertile cultivated area and [...] beautiful woods" (1890:62).

Antonio García Cubas' geography textbooks are balanced and straightforward, at times even almost telegraphic. They deal with the geography of the country and its states dispassionately, with scientific distance and aim to familiarise the children with

[21] The consulted edition was Antonio García Cubas, *Elementos de geografía de los Estados Unidos Mexicanos*, Mexico City, Tipografía de la Oficina Impresora del Timbre, n/d. Although no date appears on this edition, references to this work were made in documents of the 1870s.

the principal physical characteristics of the territory they inhabit without intending to elicit any particular pride or love of the Mexican soil. They were also the most commonly used geography books in Mexican schools, more commonly, perhaps, than Roa Bárcena's works. As a matter of fact, García Cubas' *geografías* –as they were referred to in the literature of the time—served as textbooks at the primary and secondary levels of both public and private schools. Institutions as diverse as the *Escuela Nacional Preparatoria*, the Liceo Rosales, the secondary school of the state of Sinaloa, the Instituto Literario del Estado de México and the Colegio de Jesús, a private primary school in the Federal District adopted one or both of García Cubas' works as textbooks for their subjects of world and national geography.[22]

The contrast between García Cubas' and Roa Bárcena's approaches to the teaching of geography is striking. However, while only Roa Bárcena's works openly propagated an idea of the nation that can be placed within the conservative-liberal debate, both García Cubas' and Roa Bárcena's works contributed to the promotion of a territorial idea of the nation, insofar as they emphasised the conception of Mexico as a limited and identifiable territorial entity in the globe. Indeed, through García Cubas' and Roa Bárcena's textbooks, as well as through the maps that usually accompanied them, the Mexican children and youth learnt to recognise the shape of "their country" and to establish a relationship between their concrete lives and the "map-as-logo",[23] that is to say, the cartographic representation of that otherwise abstract entity called Mexico.

5.3 The teaching of national history

Unlike civics and geography, which were subjects that were present in the educational plans prior to the restoration of the Republic, "history" or, more specifically, "history of Mexico", only made its first appearance on the curricula of Mexican public primary schools after the liberal triumph in 1867. Although earlier attempts had been made to

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[22] For the ENP, see: Ernesto Lemoine, *La Escuela Nacional Preparatoria en el período de Gabino Barreda, 1867-1878*, Mexico City, UNAM, 1970, p.100; for the Liceo Rosales, see: Héctor R. Olea, *Trayectoria ideológica de la educación en Sinaloa (1592-1939)*, Culiacán, Universidad Autónoma de Sinaloa, 1993, p.102; for the Instituto Literario del Estado de México; see: Jesús Fuentes y Muñiz a Mariano Riva Palacio, Toluca, 19 May 1870, Mariano Riva Palacio Collection (1716-1880), 8770, *BLAC*; for the Colegio de Jesús; see: *Colegio de Jesús. Instrucción elemental y superior para niñas dirigida por el profesor titulado bachiller Manuel Ruiz Dávila*, 1872, LAF 1556.

[23] Anderson, *Imagined Communities*, p.175.

include the study of Mexican history –more often than not ancient history or "antiquities" as the literature of the epoch called it—in the programmes of higher education,[24] it was really with the restoration of the Republic that the chain of events related to the "birth" and "evolution" of Mexico became a story to be told, especially to the children. Indeed, as "one of the ways in which societies intentionally transmit to the new generations the articulate network of symbols that constitute the basic truth of the citizens about their own country",[25] the teaching of history requires that there be a certain consensus about the story that is to be told. Before the restoration of the Republic, this consensus did not exist in Mexico. It is therefore not fortuitous that prior to the liberals' consolidation in power the "history of Mexico" was either altogether absent from the curricula or, in the rare cases when it was present, it referred to pre-Hispanic times; for in respect of independent Mexico, "the story to be told" was not yet agreed upon.

In turn, after the liberal victory and under the sway of positivism a new understanding about the history of the country began to emerge among the liberal intellectual elite. In it the *Reforma* appeared as the pinnacle of the struggle for emancipation of the Mexican people that had begun with the Aztecs' resistance to the conquest and had continued with the popular movement for independence. While this interpretation fell short of the "single comprehensive history in chronological, geographical [and] ideological terms",[26] which would eventually appear during Porfirio Díaz's rule (1876-1880/1884-1910), it was, nonetheless, a first version that contained the main elements on which Porfirian intellectuals would base their rendition of the country's history. Moreover, the emergence of this initial comprehensive account opened the way for the use of history in the classrooms as a form of socialisation of the children into the values of the liberal state. For, by providing a clear set of heroes and anti-heroes, by emphasising the liberal-patriotic virtues of the members of the national pantheon and by establishing a well-delineated hierarchy of events, the teaching of this first Mexican "official" history offered as much an opportunity to transmit the concepts of the liberal imagery as the teaching of civics did.

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[24] ["Proposición del Reglamento para un instituto de ciencias, literatura y arte"], 25 March 1825, *AGN*, Justicia e Instrucción Pública, vol.10, exp.3; ["Decreto sobre el Plan General de Estudios"], 18 August, 1843, *LAF* 455; "Plan General de Estudios" (1855), discussed in Meneses Morales, *Tendencias educativas oficiales...*, p.138-39.

[25] Josefina Vázquez de Knauth, *Nacionalismo y educación en México*, 2nd ed., Mexico City, El Colegio de México, 1975, p.1.

[26] Mauricio Tenorio-Trillo, *Mexico at the World's Fairs: Crafting a Modern Nation*, Berkeley and Los Angeles, University of California Press, 1996, p.66.

It must be said, however, that during the Restored Republic this opportunity was not seized as enthusiastically by the governing and educating elites of the country as it would be during Porfirio Díaz's administration, when the governing elite demanded that the study of history of Mexico be compulsory at all levels. Moreover, in the words of François-Xavier Guerra, during the *Porfiriato*, at the government's initiative, "history [...became] a pedagogy. It restructure[d] the past around the pursued goal [...] of 'making the Mexican youth learn the good liberal principles, of rendering it above all, Mexican, patriotic, liberal, republican and definitely enthusiastic for the people and the Reform'."[27] By contrast, during the post-1867 administrations of Juárez and Lerdo not all the members of the liberal elite shared in equal measure the belief in the potential of the teaching of history as a vehicle for the transmission of the values of the state. The exchanges between Manuel Payno, lecturer of history at the *Escuela Nacional Preparatoria*, José María Iglesias, Minister of Instruction and Gabino Barreda, director of the ENP, in December 1869 regarding the course of history of Mexico at the National Preparatory School clearly illustrate this point.

On 6 December 1869 Manuel Payno wrote to the Minister of Instruction to complain about the fusion of the courses of "general history" and "history of Mexico" into one single course of the preparatory curriculum.[28] In his letter Payno expressed the view that in order to acquire a "perfect instruction in the particular history of the country and of the world in its different epochs" it would be necessary to have two separate courses and to increase their duration from one to two or three years.[29] The Minister of Instruction, in turn, consulted with Gabino Barreda, who replied that

> although it is true that in order to acquire a *perfect* knowledge of world history and of the history of the country, it would be necessary to spend at least the time requested by Mr. Payno, the spirit of the law is not for students to acquire such a degree of instruction in history, but rather only the necessary notions that will allow them to have, with regard to general history, a clear and well-founded idea of the march of humanity in its progressive evolution, as well as of the most important events in the life of the Nations [...].With regard to the history of the country, there is no need for such a detailed and thorough study, as it would have to be if all the time Mr. Payno seems to wish were employed therein. I believe [...] that the

[27] François-Xavier Guerra, *Le Mexique, de l'ancien régime à la révolution*, Paris, L'Hartaman/ Publications de la Sorbonne, 1985, v.1, p.391. Here Guerra is quoting Guillermo Prieto, *Lecciones de historia patria, escritas para los alumnos del Colegio Militar por el Profesor [...]*, Mexico City, Oficina Tip. de la Secretaría de Fomento, 1891, p.464.
[28] See above, p.152, note 89.
[29] Manuel Payno a José María Iglesias, Mexico City, 6 December 1869, *AGN*, Instrucción Pública y Bellas Artes, caja 224, exp.59.

> time currently devoted by the rules [of the school] to the study of history should not be increased, for if this time is employed well by the professor, it is sufficient to attain the desired goals, the only ones to which a *general* and *preparatory* education can aspire.[30]

Following Barreda's verdict, José María Iglesias wrote to Payno to inform him that the decision had been made not to establish two different courses of history, or to devote more attention to the study of this subject, due to the fact that, according to the law, both general history and history of Mexico were only part of a preparatory programme.[31] It is indubitable that both financial concerns and internal politics of the ENP were decisive in the outcome of this trilateral exchange,[32] however, the terms on which the minister's decision was argued reveal that national history was not yet seen by all as a fundamental subject in the instruction of the young and, more importantly, as the essential element in the creation of members of the Mexican nation that it would later become.

This does not mean, however, that there was no interest in the research of Mexican history among the members of the liberal government. On the contrary, since their first accession to power after the Ayutla Revolution the liberals dictated measures directed at finding and collecting documents that related to the nation's past. That the records of "the history and antiquities" of the country were qualified as matters of "national interest" only underlines the fact that an awareness about the relevance of knowing and understanding the history of the country was emerging.[33] To be sure, this emerging awareness did not immediately translate itself into a programmatic effort to

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[30]Gabino Barreda a José María Iglesias, Mexico City, 22 December 1869, *AGN*, Instrucción Pública y Bellas Artes, caja 224, exp.59. Emphasis in the original.

[31] José María Iglesias a Manuel Payno, Mexico City, 24 December 1869, *AGN*, Instrucción Pública y Bellas Artes, caja 224, exp.59.

[32] Payno's other main complaint was that after José María Lafragua, originally appointed as lecturer of history of Mexico, had no longer been able to teach the course, he [Payno], who was in charge of the general history course, had to take up both assignments, receiving after the fusion of the two lectures the salary for only one course. Payno further expressed his suspicion that the decision to "make these economies" was directed personally against him. See: Payno a Iglesias, 6 December 1869 and Manuel Payno a la Junta Directiva de Instrucción, Mexico City, 6 December 1869, *AGN*, Instrucción Pública y Bellas Artes, caja 224, exp. 59.

[33] In December 1856, President Comonfort decreed that all the documents related to the history of Spanish domination in Mexico should be preserved, as it was to be regretted that "the Mexicans know perfectly the ancient and modern history of Asia and Europe, while ignoring their own." Quoted by Vázquez de Knauth, *Nacionalismo y educación...*, p.43. Similarly, in 1865 President Juárez, then based with his cabinet and government in Chihuahua, created a commission headed by Guillermo Prieto that was to consult Chihuahua's state archives in search of documents relating to "the history, antiquities and other issues of national interest, so that they can be used in the most convenient manner instead of being lost or destroyed." ["Comisión a los CC Guillermo Prieto y Pedro Contreras Elizalde para que busquen en los archivos del Estado los documentos relativos a la historia, antigüedades y otros puntos de interés nacional"], *AGN*, July 5 1865, Justicia e Instrucción Pública, vol.28, caja 520.

use history as the "pedagogy" of which Guerra speaks. Nonetheless, the fact that since 1856 and more markedly since 1867 the subject of history of the country was made a compulsory part of the curriculum at different levels of the public education system and in different parts of the country –even if only as one among many other elements of the "general culture" every educated Mexican was expected to possess— suggests that this awareness about the still-to-be-defined importance of the study of history was making its way into the school. This, in turn, created a need for textbooks that were adequate to the new task of instructing the Mexican youth in the history of their country.

Prior to the *Reforma* very few books on the history of Mexico had been written, and, with a couple of exceptions, those books which existed had not been conceived as textbooks.[34] By contrast, since 1867 and especially after 1870 new national history textbooks began to appear on the Mexican book market to meet the demand for teaching materials for the newly instituted course of history of Mexico in the primary cycle. The contents of these books certainly varied from work to work, not least because they reflected the political tendencies of the authors and, in consequence, their interpretation of the nation's history. It is to the analysis of these books that were written during the *Reforma* period and that were therefore available as textbooks after the restoration of the Republic that the following pages are devoted.

5.3.1 Anastasio Leija's *Compendio de historia de México* (ca. 1857)

A few months after the successful end of the Ayutla revolution, Anastasio Leija published his *Compendio de historia de México: arreglado para las escuelas primarias*.[35] As the first history textbook written during the *Reforma* period, and addressed specifically to a primary school audience, Leija's work provides a synthetic vision of the country's history dating it back to pre-Hispanic times. Stamped by the political tension which characterised the period in which it was written, the *Compendio*

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[34] Specifically written with a didactic goal were: Carlos María de Bustamante's *Mañanas en la Alameda de México (Publicado para facilitar a las señoritas el estudio de la historia de su país)*, Mexico City, Imprenta de la Testamentaria de Valdés, 1835, 2 vols; José Gómez de la Cortina, *Cartilla Historial o Método para estudiar la historia*, Mexico City, Impreso por Ignacio Cumplido, 1841 and Epitacio J. de los Ríos' *Compendio de la historia de México desde antes de la conquista hasta los tiempos presentes*, Mexico City, Imprenta La Voz de la Religión, 1852.

[35] The pages quoted in this section refer to Anastasio Leija, *Compendio de historia de México: arreglado para las escuelas primarias*, 8th ed., San Luis Potosí, Imprenta de Faustino Leija, 1882. Josefina Vázquez has dated the first edition to 1857. Vázquez de Knauth, *Nacionalismo y educación...*, p.71.

reveals the liberal inclinations of its author and, therewith, his understanding of the history of the country along the liberal conception.

Leija's account begins with the "discovery" of America by Columbus and continues with a swift look at the pre-Hispanic past. Of the peoples who inhabited the Mexican territory before the arrival of the Spaniards, it is the Aztecs who receive the most detailed attention and praise. In fact, Leija portrays the Aztecs as an "audacious and warrior people" (1882:10) of "simple and affable customs" (1882:11) and extols the beauty of their most important city, Tenochtitlan which, "historians assert, was the richest and most beautiful city of the New World" (1882:15). This otherwise positive depiction of the Aztecs is, nonetheless accompanied by a strong condemnation of their religion, which in Leija's words was "an absurd idolatry, full of errors and superstitions, and so barbaric that they sacrificed human victims to their gods" (1882:11).

While the Aztecs are never explicitly presented as the forefathers of the Mexicans, a certain continuity between the Aztec past and contemporary Mexico is implied at several points in the *Compendio*. Furthermore, looking at the Aztec past affords Leija with an opportunity to highlight the valour of the Aztecs and therefore to present them as heroes. In this vein, in his narration of the Aztec resistance to the Spanish conquest Leija asserts that Aztec emperor Cuauhtémoc was "because of the way in which he defended the capital and his civic virtues, worthy of comparison with the greatest heroes of antiquity" (1882:19). Yet, on the whole, the *Compendio* falls short of identifying contemporary Mexico as descending directly from the Aztecs. The fact that, despite restoring Cuauhtémoc's character and placing it on a par with the classical heroes, Leija refrains from giving the Aztec emperor the appellative of "national hero" as he does with Hidalgo and Morelos, for instance, suggests that the author sensed the importance of including the pre-Hispanic past in his narration of Mexico's history, but was still undecided about the place it should occupy and the way it was to be related to modern Mexico.

In congruence with the liberal interpretation of the country's history, the *Compendio* portrays the colonial epoch as one of Spanish abuse and backwardness. And if in an effort to be impartial Leija points out that among the sixty-three viceroys that governed New Spain there were "eminent and honest men, who distinguished

themselves for their humanitarian sentiments",[36] he finally draws a clearly negative balance of the years of Spanish domination (1882:24). For, in his view, under the colonial system, "the Spanish government hardly occupied itself with the intellectual and moral progress of the masses, [...] despite the efforts of its apologists in proving the opposite" (1882:24). The rejection of the Spanish colonial system is as evident in this assertion as is the reply to the conservative idealisation of the colony as an epoch of order, prosperity and growth. In a similar way, Leija replies to the conservatives' claim that the years of internal strife that followed independence had been a product of the federal republican system adopted after Iturbide's downfall by stating that "the state of anarchy in which we have been is certainly not to be blamed on the system that rules us, but rather on the backwardness in which the Mexican people were kept during the Spanish domination" (1882:40)

It is, in fact, the defence of the republican system –and the concomitant rebuke of the monarchy—that appears as one of the most obvious signs of the liberal interpretation of Mexico's history in Leija's *Compendio*. Rather than being portrayed as an illegitimate system in itself, however, the monarchy is presented as simply being unsuitable for America. Thus, according to the author, "[...] in Europe monarchies have a reason to exist, [but] in young America they have none, for not having that tradition, that alleged divine right and those historical memories which are [the monarchy's] main support, the establishment of a monarchy among us is nothing more than a utopia" (1882:38). This, and not the betrayal of the people, is what in Leija's point of view, caused the collapse of Agustín de Iturbide's and Maximilian's empires (1882:38 and 54). The conception of Mexico as essentially American and therefore republican –in sharp opposition to monarchical Europe—is hence evident in the *Compendio*.

Not only is the republican dimension present in Leija's interpretation, but so is the popular dimension that characterised the liberal idea of the nation. For one thing, the qualification of Hidalgo's insurrection as the "great revolution that gave liberty to Mexico" (1882: 25) and the mention of Morelos as "the most intrepid champion of the idea born in Dolores [...] who, after Hidalgo, occupies a prominent place in our history" (1882:30), as well as the minimisation of Iturbide's role in the attainment of

[36] In particular, Leija highlights the deeds of the second viceroy, Luis de Velasco, in favour of the indigenous population. After his death in 1564, which was "felt by both Mexicans and Spaniards", Velasco deserved --according to Leija—the epithet of "father of the Indians." *Compendio de historia de México...*, p.23.

independence (1882:35), point to the liberal preference of the popular movement over Iturbide's campaign. For another, and more blatantly, towards the end of the 1882 edition, Leija refers to the War of Reform and depicts it as the war between the two parties that since independence had disputed the control over the state. He further describes those two parties as "the conservative party, [which] represented the monarchical-religious tradition, the power and the privileges of the clergy and the army and [whose] principle was force" and the "true republican party" lead by Juárez, which "proclaimed popular sovereignty and the great principle of sacred and inviolable human liberty" and whose banner was "legality and [whose] support [was] an invincible power: the power of the law" (1882:48).

Anastasio Leija's *Compendio* is, in sum, an elementary work that clearly rehearses the liberal interpretation of Mexican history. While not ostensibly patriotic in its tone, the work presents the elements upon which the liberals aimed to build the Mexican nation: an emphasis on the principle of popular sovereignty, a defence of republican institutions and the law and the identification of the Mexican Republic as essentially American. The fact that twenty-five years after its first publication the *Compendio de historia de México* was still being printed might be an indicator of the success Leija's interpretation of Mexican history had not only during the Restored Republic, but also during Porfirio Díaz's rule.

5.3.2 José María Roa Bárcena's *Catecismo elemental de la historia de México* (1862)

Like Antonio García Cubas, José María Roa Bárcena directed his authorial efforts at producing not only textbooks of geography of Mexico, but also of national history.[37] In contrast to his geographer colleague, however, Roa Bárcena published his first textbook of history of Mexico early on, even before the subject became compulsory at the primary level. Indeed, it was with the declared intention to assist the improvement of public secondary instruction that in 1862 Roa Bárcena published his *Catecismo elemental de la historia de México.*[38] More specifically, according to the author, the

[37] García Cubas' work, *Compendio de la historia de México y de su civilización para uso de los establecimientos de instrucción primaria*, Mexico City, Imprenta del Sagrado Corazón de Jesús, 1890, first appeared during the *Porfiriato* and has therefore been excluded from the present analysis.

[38] For this work two editions were consulted: José M. Roa Bárcena, *Catecismo elemental de la historia de México; desde su fundación hasta mediados del siglo XIX; formado con vista de las mejores obras y*

book's aim was to contribute to correcting "the detrimental anomaly" represented by the fact that young Mexicans learned about the modern and ancient history of other countries, but "lack[ed] even the most superficial notions of their own [history]." This anomaly –claimed Roa Bárcena—had as a result that the young often entered political life with a certain blindness, as they were lacking the "safest compass of politics", which was, "after justice, the knowledge of the antecedents of the country in whose administration one participates" (1880:4). Providing a basic knowledge of Mexico's past on which the future political elites of the country could base their decisions was, therefore, the goal that inspired the writing of the *Catecismo elemental de la historia de México.*

The book begins with an interesting, albeit short, section on "general notions", a mixture of human and physical geography of both ancient and modern Mexico. It is precisely the grouping of this information into a single section that renders these pages so fascinating as it suggests a continuity between pre-conquest "Mexico" and independent Mexico. And yet, this continuity appears to be no more than geographic, for "the country" to which Roa Bárcena refers throughout this part of the book is, above all else, the territory comprised within the borders of the author's contemporary Mexico. It is thus in this context that the author speaks about the "name of the country prior to the Spanish conquest" and the "races that have inhabited the country" (1880:8 and 16).

The reference to the "races" of the country affords Roa Bárcena an opportunity to turn his attention to the pre-Hispanic peoples, of whom a swift enumeration follows. Beginning with the Toltecs and mentioning groups as diverse as the Tarascan, the Cohuscan, the Jope and the Totonacs the author then focuses on the Aztecs, "the last people who inhabited Anáhuac in ancient times and who founded the main monarchy of this country" (1880:30). In the *Catecismo* the Aztecs are described as a civilised people of "not unpleasant aspect", moderate, patient, constant, grateful and severe and whose great bravery and other civic virtues had been demonstrated by the resistance they opposed to the Spanish conquest (1880:18-19). To this favourable picture Roa Bárcena adds the customary denunciation of the Aztecs' religion as "a blind idolatry full of errors and superstitious and barbaric rites" in which human sacrifices were

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propio para servir de texto a la enseñanza de este ramo en nuestros establecimientos de instrucción pública. 2nd ed., Mexico City, Imprenta de Santiago White, 1867 and *Catecismo elemental de la historia de México; desde su fundación hasta mediados del siglo XIX; formado con vista de las mejores obras y propio para servir de texto a la enseñanza de este ramo en nuestros establecimientos de instrucción pública.* 4th ed., Mexico City, Imprenta de F. Díaz de León, 1880. The quotes refer to the fourth edition.

performed (1882:17). This censure notwithstanding, the general depiction of the Aztecs that Roa Bárcena offers in the *Catecismo* is, basically, a positive one; for, as the author states, even if their religion was wrong, the Aztecs were a moral and honest people, who "had an idea, albeit imperfect, about the Supreme Being [...] and believed in the immortality of the soul" (1880:17).

Far from being limited to the pre-Hispanic peoples, the section that deals with the "races" of the country tackles other aspects of Mexican demography, such as the existence of a numerous Spanish population, who "came at the time of the conquest and thereafter [...]" and whose offspring were, together with "the *pure indigenous* race, that descends from the ancient inhabitants, [...] the *mixed* [race], that derive[d] from the union between Spaniards and Indians and the *foreigners* of diverse nationalities settled in our territory", the main races that constituted the country's population (1880:16; emphasis in the original). Interestingly, Roa Bárcena not only classifies the different groups that compose Mexico's population, but also qualifies them. In what is slightly reminiscent of the European Enlightenment portrayal of the inhabitants of America, both native and not,[39] Roa Bárcena asserts in the *Catecismo* that "the white (i.e. Spanish *criollo*) race is, generally speaking, intelligent, cultivated, of good feelings and manners, but lacks the energy and activity of the Europeans", whereas the "mixed race participates of the good qualities and defects of the two races from which it derives" (1880:18-19). It is, in turn, the contemporary indigenous population who receives the harshest treatment in the author's appreciation. For even if Roa Bárcena clearly states that it was in part as a result of "the violence of which [these people] were the object during the conquest and throughout different periods of the colonial epoch", the fact was that "many of the [natives'] best qualities had degenerated" and they were now isolated and backward people, "removed from the intellectual and material movement of the society of which they are part" (1880:19).

The continuity between pre-Hispanic and independent Mexico was, therefore, not one established by descent. As a matter of fact, Roa Bárcena's sharp classification of the "pure indigenous race" as the descendant of the "ancient inhabitants" and the "mixed race" as the result of the union between the Spanish and the natives clearly avoided the identification of the origins of the Mexican nation with the peoples that inhabited the land prior to the Spanish conquest that the liberals had begun to espouse.

[39] For the European characterisation of the different demographic groups in America during the eighteenth century, see: David A. Brading, *The First America; The Spanish Monarchy, Creole Patriots and the Liberal State 1492-1867*, Cambridge, Cambridge University Press, 1991, pp.422-446.

But it was not only the disassociation between the pre-Hispanic past and contemporary Mexico that separated Roa Bárcena's interpretation of the country's history from the liberal version of the nation's past. The important role Catholicism plays in Roa Bárcena's historical account also evidences his conservative inclinations. Speaking of the conquest, Roa Bárcena asserts that it was with the arrival of the first Spanish missionaries who preached the Gospel among the Indians that the "blind idolatry", which was the country's "first religion", began to disappear. He further states that eventually "all the population of Anáhuac joined the Church of Jesus Christ" and Catholicism became therefore "the religion of the country" (1880:17-18). Moreover, throughout the narration of the conquest, the actions taken by the Spaniards to introduce Catholicism in the New World and to convert the Aztec nobility to what the author deemed to be the true religion receive specific mentions (1880:54 and 57). Against this backdrop, Catholicism appears as inseparable from the Mexico that would emerge after the conquest.

After a lengthy enumeration of all the viceroys and the main events that took place during their administrations, Roa Bárcena presents a positive balance of the three hundred years of colonial rule. Although not too emphatically, the years of Spanish domination are clearly described as ones of buoyancy and growth. Furthermore, the extensive space that the author devotes to colonial Mexico affords him with numerous opportunities to highlight the particular positive characteristics and deeds of each of the viceroys. Thus, for instance, Viceroy Antonio de Mendoza is described as a "sensible and excellent person" (1880:81) and Viceroy Luis de Velasco as someone "whose death was regretted by Mexicans and Spaniards alike and who, due to his political virtues, merited the title of *father of the patria*" (1880:82; italics in the original).[40]

A detailed account of the war of independence occupies the last part of the section devoted to the colony in the *Catecismo*. Although elaborate descriptions of the events that took place before and during the insurrection fill the pages of Roa Bárcena's work, there is little in the way of an explanation of the reasons or causes of the movement. Roa Bárcena further presents a neutral picture of Hidalgo and, while he qualifies the priest as a "*caudillo*" (1880:145), he refrains from according Hidalgo the status of hero. José María Morelos, in turn, is deemed "the most notable among the leaders of the insurrection" (1880:163). The ultimate honour of being "the Liberator"

[40] Contrast with Anastasio Leija, for whom Velasco had been the "father of the Indians", but not of the *patria*.

(1880:187) and "the hero of Iguala" (1880:205) falls, however, upon Agustín de Iturbide, principal hero of the conservative pantheon.

Following the format of preceding parts, the section of the book devoted to independent Mexico begins with the enunciation of some "general notions", which include a mention of the republican system of government and specifically look at "the bases that support[ed] the Mexican Republic." It is in this context that, in a sequence of questions and answers, which could very well fit in any text written by an openly liberal author, Roa Bárcena states the principles that the republican system in Mexico recognised; namely, "the sovereignty of the people, that is to say the exercise of the national will through electoral acts, the liberty and political equality of all the citizens and the division of public power into the legislative, executive and judiciary branches" (1880:190).

The period that followed the attainment of independence is dealt with in the work somewhat briskly and dispassionately. Rather than an actual account of events, the section devoted to post-1821 Mexico resembles, in fact, a list of presidents. With the exception of the war with Texas and the 1838 war with France, of which superficial mentions are made, little is said about Mexico's turbulent international relations and domestic politics during the first decades of independent life. The sole event that receives a longer comment in Roa Bárcena's account is the 1846-1848 war with the United States, which is presented as a deliberate act of aggression on the part of that country. According to Roa Bárcena, it was after nearly two decades of pursuing a policy aimed at expanding its territory at Mexico's expense and resorting to feeble pretexts that "[...] the neighbour nation assumed the role of aggressor and brought us the war with the poorly concealed aim to ensure its conquest and acquire the immense portion of territory that, in addition to Texas, was ceded to them" (1880:227). The anti-Americanism that characterised Mexican conservative thought is palpable in this statement, as it is in the rest of the narration of the American occupation of the capital with which the book ends.[41]

While by no means extreme, Roa Bárcena's interpretation of the history of Mexico is in its emphasis on Catholicism and its positive view about the colonial period recognisably conservative. The problematic relationship with the pre-Hispanic

[41] The exclusion of the events that took place after the Mexican-American war from even the 1880 version of the *Catecismo elemental de la historia de México* is perplexing, especially if one considers that the 1869 edition of the geography textbook written by the same author included a note on history of the country up to 1867.

peoples is, in turn, a characteristic that the book shares with liberal and conservative works alike. Having been first written in 1862 as a basic text for secondary schools, the *Catecismo* had a very long life. It was revised and re-edited in 1867, when, apparently, the first edition was sold-out. Furthermore, according to its editors, the *Catecismo* enjoyed a wide demand as "it had been adopted [as a textbook] in a great number of schools and colleges."[42] However, while there is evidence that it was mainly private schools that used the work as teaching material –as with his geography textbook, the Instituto Literario de Jalapa took up the Roa Bárcena's *Catecismo* as a text for the teaching of history of Mexico at the primary level[43]-- it is not so clear whether the work was also used in public schools. It would not be, in fact, until 1870 that the closest to an "official history textbook" would emerge in the form of a catechism written by a liberal author, thus fulfilling the role that Roa Bárcena aimed to give to his work.

5.3.3 Manuel Payno's *Compendio de la historia de México* (1870)

"The little work that I am printing is a compendium of the history of Mexico from Columbus to the current administration. It will be very short and suitable for primary instruction. I will dedicate it to the State of Mexico and yourself, and if you take 1500 copies I will write a series of textbooks for the primary schools of the State of Mexico."[44] With words and offers like these –in this case addressed to his good friend and governor of the State of Mexico, Mariano Riva Palacio— Manuel Payno publicised what was to become the most successful national history textbook of the nineteenth century in Mexico. The *Compendio de la historia de México para el uso de los establecimientos de instrucción primaria de la República*[45] was, in fact, since its first appearance in 1870, the dominant textbook for the teaching of national history in public and private schools alike. Not only the effective marketing efforts of the author, but

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[42] José María Roa Bárcena, *Catecismo elemental de la historia de México; desde su fundación hasta mediados del siglo XIX; formado con vista de las mejores obras y propio para servir de texto a la enseñanza de este ramo en nuestros establecimientos de instrucción pública*, 2nd ed., Mexico City, Imprenta de Santiago White, 1867, "Advertencia".

[43] *Instituto Literario de Jalapa.*.

[44] Manuel Payno a Mariano Riva Palacio, Mexico City, 23 December, 1869, Mariano Riva Palacio Collection, 8343, *BLAC.*

[45] For this work the second (1871) and tenth (1891) editions have been consulted: Manuel Payno, *Compendio de la historia de México para el uso de los establecimientos de instrucción primaria de la República*, 2nd ed., Mexico City, Imprenta de F. Díaz de León y de S. White, 1871 and *Compendio de la historia de México para el uso de los establecimientos de instrucción pública de la República Mexicana*, 10th ed., Mexico City, Imprenta de F. Díaz de León, 1891.

also his being a prominent, well-reputed –albeit always self-confessed moderate— liberal with a good standing in the political world of the Restored Republic might have contributed to this result.

Having been an active politician during the *Reforma*, Payno supported the liberal programme and reforms, even if not always the pace at which they were undertaken. He shared with other liberals the faith in the transforming power of education and was convinced of the need to teach the Mexican youth the history of their country as a way to prevent the repetition of the misfortunes that had characterised Mexico's recent history. It was thus with the intention to provide a book in which "the children who attend[ed] primary school would find, even if in very summarised manner, the most notable events of [Mexico's] history", so that they might "imitate the valour and abnegation of many of our public men [...and therefore] avoid the obstacles upon which [the Mexicans] ha[d] stumbled [...]" (1871: "Prólogo" and 290) that Payno wrote his *Compendio*.

As Payno announced it to Riva Palacio, the work begins with the "discovery" of America by Columbus, whom the author grants the title of "the founder, the father [...] of the great families that inhabit America from Labrador to Cape Horn today" (1891:16). It is however the Spanish conquest and not the "discovery" of the continent that absorbs Payno's attention in the first part of the book. The emphasis is not fortuitous: for Payno the conquest was, in fact, the origin of Mexico, "the enterprise from which, in time, the Mexican nation and the people who currently inhabit it resulted" (1891:38). Although in the judgment that Payno makes of the conquest in a later part of the book he refers to the "infinite cruelty" of the Spaniards (1891:144), the account of the conquest given in the first part of the *Compendio* conveys an image of violence but not of extreme cruelty. The only exception to this is, perhaps, the mention of Pedro de Alvarado's excesses, which would eventually unloose the events that concluded with the *Noche Triste* (Sad Evening).[46] It is in the description of this and the subsequent incidents that Payno's sympathies appear to be openly on the side of the Aztecs, as the author regrets the final victory of the Spaniards "on the field that should have been their grave" (1891:31). It is also here that the effect of time on national mythology becomes apparent, for the relation of the *Noche Triste* incident in the 1891

[46] Having been appointed by Cortés as his lieutenant during his absence, Pedro de Alvarado massacred the most important Aztec families while they took part in a religious festival. This provoked the uprising of the Aztec people, who retaliated causing enormous losses to the Spanish army. According to the legend, on his return to Mexico City and after seeing the destruction and the lamentable state of his forces, Cortés sat under a tree and cried.

edition of the *Compendio* is considerably more extensive and romantic than that presented in the 1871 edition.[47]

Despite the conquest's being the beginning of the Mexican nation in Payno's reading, the pre-Hispanic past occupies a prominent position in the *Compendio*. Stating the need to "know the history of the people whom the Spaniards dominated and who lived in this country earlier" (1891:40), Payno dedicates numerous pages to the description of the characteristics, mores and customs of the pre-Hispanic peoples. After a brief look at the Toltecs and Chichimecs, and mentions of groups as diverse as the Olmecs, Zapotecs and Aculhuas, Payno focuses on the Aztecs, whose empire he portrays as grandiose. Following the steps of the authors of earlier history books, Payno affirms that the capital of this empire, i.e. Mexico City was large, very populated, and that "all historians assert[ed] that it was the richest and most beautiful city of the New World" (1891:25). Furthermore, the *Compendio* depicts the Aztecs as a hard-working people of simple and gentle customs (1891:76); and if Payno condemns the "hideous human sacrifices" that the Aztecs performed, he also shows considerable interest in explaining the beliefs of these people and describing their rituals without judging them.

Against the backdrop of the Spanish conquest, Payno highlights the valour of the Aztec and Texcocan kings and nobles. Cuauhtémoc, for one, is described as "a brave, indomitable [...] young man" who "enthusiastically embraced the cause of the *patria*" and was "worthy of being compared with the greatest heroes of antiquity" (1891:34 and 54). Nezahualpilli, in turn, is portrayed as "a young man full of patriotism and valour, who immediately declared himself against the Spaniards" (1891:60). Again, Payno's sympathy for the indigenous peoples is evident in these descriptions. So is the fact that, in spite of the foundational character that Payno attributes to the conquest and of the author's reservations in openly establishing a continuity between the pre-Hispanic peoples and the modern Mexican nation, a veiled identification between these

[47] In 1871 Payno described the events as follows: "Cortés returned to Tacubaya, where tradition has it that he sat under the big *ahuehuete* (which today is in the cemetery of Nuestra Señora del Claustro) and bitterly cried for his defeat and the death of his friends" (p.35). Twenty years later, the incident merited a more colourful account: "Tradition has it that Cortés sat under the beautiful and venerable *ahuehuete*, which exists today in the village of Popotla and around which a fence was put on 21 September 1873. Under the shade of this centenarian tree, Cortés thought for a while about the extent of his misfortune, he assured himself of the death of his faithful and brave friends and observed the bloody remains of his army. Tears flowed from the eyes of this rough captain and at that moment it appeared as though all the energy and vigour that had accompanied him in his enterprise had abandoned him" (p.30). This account also throws light on the process of national myth-formation and appropriation. The fact that the legendary tree was protected by a fence in 1873 suggests not only that the authorities in charge had decided to give the legend the status of history –thence the need to safeguard an authentic witness to that history—, but also that the Aztec people were becoming more prominent in the national genealogy – thence the need to preserve the trophy of their near-victory over the Spaniards.

two entities does in fact mould Payno's judgment. For one thing, the Aztec past affords the author a source of pride as well as exemplary characters whose virtues were to be praised. For another, the commendation of the Aztec and Texcocan nobles for having "embraced the cause of the *patria*" assumes that that *patria* was the Mexican one. This becomes even clearer with Payno's references to the anti-hero, Ixtlixóchitl, who due to his alliance with Cortés against the Aztec common adversary, deserves the author's censure as "the greatest enemy of his own *patria*, his own race and his own brothers" (1891:61).

And yet, while the idea of a "Mexican *patria*" stretching from pre-Hispanic to independent times might underlie Payno's interpretation of history, there is nothing in the book that suggests that this idea was accompanied by a conception of ethnic descent. On the contrary, the *Compendio* explicitly describes the contemporary indigenous populations as the "remains of the already degraded class [among the Aztecs], which was given the name of *macehuales*" (1891:76). Whether this statement reveals Payno's contempt for the contemporary indigenous peoples, or is a justification of the deplorable conditions in which the nineteenth-century indigenous peoples lived, is a subject that admits discussion. The fact is, however, that it is the indigenous peoples and only they who are identified as descending from the Aztecs.

The three centuries of colonial rule are presented in the *Compendio* as a chronology. Only in the recapitulation inserted further on in the book Payno makes explicit his judgment of the period of Spanish domination. Here, the author concedes that among the viceroys there were "some distinguished, eminent and honest men"; however he ultimately reproves the colony as a "system in which [the colonisers] t[ook] all the possible advantage [...], relegating the happiness and progress of the local population to a secondary place" (1871:169; 1891:145). However, in the 1874 edition of the book Payno added a new conclusion, which was reproduced in every edition thereafter. In it the colonial period, far from being portrayed as an epoch of abuse or oppression, as the liberal interpretation often had it, appears as a time in which the country was populated, beautiful cities were built and important beneficent institutions were founded. This assessment is finally crowned with the assertion that "Spain gave its American colonies as much civilisation as it itself had" (1891:279). One can only speculate about the reasons that motivated this progressively positive appraisal of the colonial period. To be sure, it was during the last fourth of the nineteenth century that the conception of Mexico as a product of the mixture of the Spanish and the indigenous

–both of them sources which offered uncountable grounds for pride—began to take shape. Yet, it is debatable that Payno's interpretation mirrored this emerging tendency, especially as only four years earlier his evaluation of the colony had been, on the whole, negative.

If there is one aspect of the *Compendio* that unequivocally reflects the liberal interpretation of the history of Mexico it is the approach to the war of independence. The popular movement initiated by Hidalgo, the "notable man who gave *patria* to the Mexicans" (1891:119), is characterised by Payno as a "revolution which [was] based on a just and progressive idea" (1891:127). Furthermore, the other heroes to whom Payno refers are also those individuals who led the popular insurrection in its different phases (1891:128 and 140). As could be anticipated, the role of Iturbide, "the terrible Iturbide" (1891:134), in the final attainment of independence is understated and the feat which had "brought about the end of a war that had lasted ten years and that had flooded with blood the soil of Anáhuac" is attributed as much to Iturbide's having taken "the side of the *patria*" as to Vicente Guerrero's abnegation (1891:141). That an allusion to Anáhuac was made in this particular context would suggest anew that Payno assumed a continuity between the Aztec empire and independent Mexico. Notwithstanding, it is difficult to pinpoint what this continuity might have meant for Payno, for, as was mentioned above, it was not genealogical and as the author's justification of independence shows, it was not political either. Indeed, independence, "the greatest and most necessary achievement of a people" (1891:143), was not only a right, but also a necessary and inevitable thing once the peoples attained a certain degree of wealth and population (1891:145). It is thus through the metaphor of a child's coming of age that Payno asserts that Mexico's independence was unavoidable and that had it not been proclaimed in 1810 it would have taken place a few years later (1891:145). The legitimacy of the aspiration to independence is therefore grounded on Mexico's attainment of maturity, as it were, rather than on a pre-existing political right inherited from the Aztec empire.

A final comment on the war of independence leads Payno to reflect on the bloodshed and violence that characterised the years 1810-1821. He asserts that, while not commendable, these outcomes were inevitable in a war of the nature of the struggle for independence. He admits that barbaric and cruel acts were committed by both insurgents and royalists, but only condemns those perpetrated by the colonial army. Avoiding judgement on the leaders of the independence movement, Payno concludes:

"[f]urther on history will qualify our heroes with the necessary justice and impartiality. It is instead our task as Mexicans to admire their valour, imitate their abnegation and honour their memory" (1871:170-171; 1891:145). In contrast to the appraisal of the colonial era, this assessment of the war of independence is reiterated in the 1874 conclusion (1891:279).

The events of Mexico's independent life are dealt with extensively in the *Compendio*. The political instability that characterised the history of the country from 1821 to the restoration of the Republic is well depicted through the recital of the numerous revolts and *pronunciamientos* that kept Mexico in turmoil for nearly five decades. The international conflicts to which Mexico was a party are also profusely explored. For one, the 1838 war with France is presented as an act of prepotency and arbitrariness on the part of the European power aimed at "giving its soldiers an easy way to attain military glory" (1891:169). The war with the United States, in turn, deserves a longer reference in which Payno highlights the bravery and patriotism of the National Guard (1891:183) and praises the heroic resistance of some members of the Mexican army. Interestingly, however, the *Compendio* does not discuss the causes of the war in any detail nor does it condemn or criticise the Unites States' conduct in that conflict. And while a glimpse of wounded pride might be discerned in Payno's lamentation that on 16 September 1848 "the Americans occupied the ancient capital of Moctezuma's empire" (1891:185) the tone remains neutral even in the account of the loss of territory in the aftermath of the war.

Of Mexico's international conflicts only the resistance to the 1862-1867 French intervention and subsequent establishment of the empire is presented as a national struggle. Qualified as "perhaps the most notable epoch for Mexico" (1891:203), the period of the foreign intervention appears in the *Compendio* as a time where the nation, headed by Benito Juárez and incarnated in the Liberal Party, fought in defence of its independence. The conservatives who "instigated the foreigners to invade us" are portrayed by Payno, in turn, as pretentious, revengeful and renegade (1891:202) and, by the 1874 edition, they are lapidarily denounced as "bad Mexicans" (1891:232).[48] Furthermore, in Payno's account, Benito Juárez himself, without yet being accorded the status of hero, is portrayed as "the distinguished man who had preserved the independence and honour of the Republic" (1891:227) and "his" party as the one which

[48] Compare with the 1871 edition, p.276, where this denunciation does not appear.

had "for long represented the principles of pure democracy as well as the nationality and independence of Mexico" (1891:214).

Payno's conclusion to the 1871 edition of the book reflects the author's dismay at the chain of wars, both internecine and international, that had been the feature of Mexico's history since independence. In it the author regrets that between 1810 and 1871,

> the blood of the Mexicans ha[d] not stopped flooding the battlefields and the periods of peace ha[d] been so short and insignificant that it [was] even difficult to identify them [...] with the result that civil war ha[d] rendered sterile all the sacrifices made by the nation in general and by its children in particular to attain independence and strengthen liberty and public order (1871:290).

Only three years later, the *Compendio* offered a much more optimistic balance of the country's history in which even those civil wars that had so preoccupied and disheartened Payno in 1871 were given a new meaning. Indeed, in consonance with the positivistic philosophy that had begun to permeate the thought of the Mexican liberals during the last third of the century, in the conclusion to the 1874 edition (reproduced in the 1891 edition) Payno presents these civil wars as inevitable evils, which, however, had brought about "evolutions and not revolutions in the march of civilisation" and which had led the Mexican people "to an advanced moral state, for which some nations in Europe [were] still struggling" (1891:279-280). In order to prove that these wars had not only been fought for worthy causes, but had also resulted in Mexico's progress the author added:

> The long struggle for independence, first, and later the defence of the republican institutions and of the sovereignty of the nation in recent times, as well as the adoption of the fundamental principles of civil and religious liberty are extremely good and honorable things, which no impartial observer can fail to recognise (1891:281).

At the end of the day it was, then, the success of the Reform, that in Payno's opinion vindicated the whole of Mexico's history. The progressive view of the history of Mexico as a struggle for emancipation beginning with the 1810 insurrection and culminating with the triumphant *Reforma* that underlies Payno's reading is, in this context, an unmistakable example of the liberal interpretation of history.

As regards the idea of the nation itself, the *Compendio* is unequivocal in presenting the Mexican nation as the product of the Spanish conquest. However, the work does not imply that Mexico had been the result of the mixture of Spanish and indigenous elements and, thus, does not necessarily herald the thesis of *mestizaje* as the origin of the Mexican nation. Rather, it would seem that for Payno the concept of "nation" refers, in fact, to a human community, while "*patria*" denotes, rather, the political independence of that community. It is under this light that the *Compendio* presents Hernán Cortés at the origin of the Mexican nation and Miguel Hidalgo as the man "who gave *patria* to the Mexicans."

The dating of the origin of the nation to the Spanish conquest does not preclude Payno from establishing a vague continuity between the Mexican nation and the pre-Hispanic past. Nonetheless, this continuity appears to be justified above all else, in geographical terms. In other words, the pre-Hispanic world deserves Payno's attention because it existed in the same territorial space that would later be occupied by the Mexican nation and not because it was genealogically or otherwise connected to contemporary Mexico. The references to the Mexican blood "flooding the soil of Anáhuac" and the Americans occupying the capital of "Moctezuma's empire" point in this direction. Having said that, it is necessary to stress that the relationship to the pre-Hispanic past, particularly in regard to the Aztec people is in Payno's work a complex one, as the Aztec people also provide a source of pride and exemplary characters whose virtues were to be acclaimed. Far from being exclusive to Payno, this ambiguity reflects the problematic relationship that even to our days exists in Mexico *vis-à-vis* the pre-Hispanic past.

The liberal conceptualisation of the Mexican nation as one which privileges the role of the people is mirrored in the *Compendio* through the interpretation of the movement for independence as a popular insurrection. The centrality of the republican institutions for the existence of the nation is also present –albeit not very forcefully—in Payno's reading. Indeed, the *Compendio* not only presents the Liberal/republican Party as the incarnation of the nation, but from the 1874 edition on it also justifies the wars that plagued independent Mexico's first five decades on behalf of the attainment of independence as well as of the defence of the republican institutions and the principles of civil and religious liberty. It is these elements which clearly place Manuel Payno's *Compendio* among the works that diffuse the liberal idea of the nation.

As was mentioned at the beginning of this section the *Compendio* was the prevalent text for the teaching of national history during the Restored Republic. Soon after its publication it was adopted as a textbook for the public schools of the states of Mexico, Michoacán, Sonora, Oaxaca, Zacatecas and for the municipal schools of Mexico City, as well as for the schools run by the Lancaster Companies of Mexico and Durango.[49] The work's success was such that, according to its author, the fifteen thousand copies that had been published in 1870 were sold out in less than a year.[50] Moreover, Payno's *Compendio* was soon made part of the study programmes in various institutions of secondary education. The *Escuela Nacional Preparatoria*, for one, and the Liceo Rosales in Sinaloa,[51] for another took the work in for their history courses. It was perhaps the widespread adoption of the work at all levels of the school-system that motivated the change of the book's title from *Compendio de la historia de México para el uso de los establecimientos de instrucción primaria de la República* to *Compendio de la historia de México para el uso de los establecimientos de instrucción pública de la República Mexicana,* thus reflecting the general appeal and adoption of the work as a textbook in the whole spectrum of Mexican schools.

5.3.4 *Cartilla de la historia de México* (1870)

The same year that Payno's book was issued for the first time, another work on history of Mexico appeared on the editorial market. Published anonymously in its 1870 edition, the *Cartilla de la historia de México dedicada a las escuelas municipales de la República*[52] was a short and succinct manual of modest ambitions, which in its less than fifty pages and two hundred questions and answers covered the history of Mexico from its first inhabitants to the *Reforma.* Unlike other texts, whose political orientation is clear from the outset, the *Cartilla* is difficult to place within any of the two main trends that have hitherto been used as analytic criteria in this work. This might be the result not only of the extremely condensed form of the book, but also of the fact that its

[49] Payno, *Compendio de la historia de México...*, 1871, "Prólogo".
[50] Ibid.
[51] Héctor R. Olea, *Trayectoria ideoloógica de la educación en Sinaloa* (1592-1939), Culiacán, Universidad Autónoma de Sinaloa, 1993, p.102.
[52] *Cartilla de la historia de México dedicada a las escuelas municipales de la República*, Mexico City, Tipografía Mexicana, 1870. The authorship of this work could be attributed to Ángel Núñez Ortega, who in 1882 published and signed a very similar work. However, the available evidence is not sufficient to confirm this hypothesis.

author refrains from making any explicit value-judgments about the historical events he set out to recount.

"What name was given to our *patria* by its first inhabitants?" (1870:2) is the question with which the work directly begins. The answer to this question, as well as to the subsequent ones, about the inhabitants of the "Mexican Republic" (1870:3) prior to the Spanish conquest evidences that for the author of the *Cartilla* the connection between the pre-Hispanic past and contemporary Mexico is, as for most of the other authors, one which is justified in terms of geographical/territorial continuity. A few references to other pre-Hispanic peoples precede the longer look at the Aztecs "or Mexicans", who are described as having had "bravery" as their "major virtue" and "excessive cruelty" as their "greatest defect" (1870:7). Interestingly, however, the mention to the "excessive cruelty" of the Aztecs is accompanied by what can be interpreted as an apology of the human sacrifices they performed. Indeed, the author of the *Cartilla* states that the religion of the Aztecs presented "some peculiarities", which were "similar to [those of] some European peoples, such as the ancient inhabitants of the north of France and England, who sacrificed human victims to the deities they adored" (1870:8). Thus, while referring to the human sacrifices in the context of the cruelty which distinguished the Aztecs, the *Cartilla* places them in a comparative framework with the religious practices of peoples who once inhabited Europe –in 1870 the utmost example of progress and civilisation— and therefore relativises the "barbarism" for which the Aztecs" religion was often condemned.

This notwithstanding, the author's views about the Aztec people are emotionally detached, as the relation of the conquest shows. Even if the author makes the customary comment about Cuauhtémoc's valour and his being "classified by History within the classical type" (1870:22), it is Cortés who receives the better treatment, for not only is he portrayed as astute and diligent, but also as able to overcome the greatest obstacles, as the incident of the Sad Evening proved (1870:14 and 20). It is perhaps this favourable depiction of Cortés as well as some mentions of the beneficial effects of the introduction of Catholicism into the conquered land that would suggest a certain inclination of the author of the *Cartilla* towards the conservative interpretation of history. This impression is, however, immediately contradicted by the fact that the colonial period, cornerstone of the conservative reading of the history of Mexico, is covered by only three questions in the work. One for each

century of colonial rule, the questions highlight the "notable" and "odious" viceroys (1870:27) without offering any kind of insight into the colonial period itself.

Similarly, the *Cartilla* deals with the war of independence in a hasty way. Characterised as a war in which "none of the parties respected property, rights or the natural law" (1870:31), the struggle for independence is presented as a unitary movement, which was proclaimed by Hidalgo, continued by Morelos after Hidalgo's death and completed by Iturbide (1870:29-36). The events that followed the attainment of independence are reviewed swiftly and without emotion in only eight pages. The obligatory references to the war with Texas in 1836 and with France in 1838 are included, as is a mention of the Mexican-American war of 1846-48. A glimpse of anti-Americanism can be perceived in both the account of the Texan proclamation of independence and of the war with the United States and the consequent loss of Mexican territory (1870:43-44). However, this alone does not suffice to identify the text as conservative. Nor does the brief mention of the *Reforma* as "the most notable occurrence during the last administrations [which consisted in] the complete reform of the institutions of the country, embodied firstly in the 1857 constitution and later in several special decrees promulgated between 1858 and 1860" (1870:45), with which the text concludes, help to assess what, if any, the idea of the nation was that the *Cartilla* aimed to put forth.

The *Cartilla* is, in sum, a brief and superficial work which does not offer a view of Mexican history that can be identified with any of the two prevailing trends of the last third of the nineteenth century. Despite its being dedicated to "the municipal schools of the Republic", no evidence could be found that the work had been in fact adopted as textbook in either public or private schools; and although it is likely that the *Cartilla* was reedited in the 1880s, it does not appear to have had any significant impact on the educational world of the Restored Republic.

5.3.5 Eufemio Mendoza's *Curso de historia de México* (1871)

In 1871 Eufemio Mendoza published his *Curso de historia de México*.[53] Written as a corollary of the author's course of national history at the *Liceo de varones* (secondary

[53] Eufemio Mendoza, *Curso de historia de México. Lecciones dadas en el Liceo de varones del Estado de Jalisco por el Lic. [...], de la Sociedad Mexicana de Geografía y Estadística*, Mexico City, Imprenta de Vicente Torres, 1871.

school for boys) of the state of Jalisco, the *Curso* is perhaps the most peculiar national history textbook published during the period 1857-1876. For one thing, the work presents a view of Mexico's history, which is not only passionate, but also uncompromisingly nationalistic. For another, as a careful reading of the *Curso* reveals, the book appears to be a forceful liberal reply to José María Roa Bárcena's *Catecismo elemental de la historia de México.*

In fact, not only does Mendoza's *Curso* closely follow the structure of Roa Bárcena's book, but it also reproduces several of its paragraphs and the opinions contained therein only to complement and contrast them with Mendoza's own judgments. In this vein, echoing Roa Bárcena's conviction about the importance of the teaching of history, particularly among those who were to participate in the "political life" of the country, Mendoza begins his work by stating that: "All nations have regarded the study of history as the first subject to which their children should be devoted, especially those [children] who, by virtue of their birth are summoned to take part in the affairs of the state" (1871:3). Yet, in a clear manifestation of his liberal-democratic orientation, the author adds:

> In a country like ours, in which all the citizens contribute with their votes to the conduct of public affairs, the study of history is even more necessary than in other countries, for its main objective is to draw lessons for the future, thus avoiding [*sic*], thanks to experience, the reefs on which the ship of the state has stumbled (1871:4).

For Mendoza, therefore, the study of history was not to be confined to the political elites, but was instead the key to a knowledge that all citizens of a democratic republic required in order to participate in the affairs of the state. Furthermore, in Mendoza's viewpoint, the indispensability of the study of history transcended the simple need to learn from the past in order to avoid making mistakes in the future and responded, rather, to the imperative necessity of inculcating in the citizens the love of country: "Republics –Mendoza asserts— subsist and prosper thanks to the patriotism, to the abnegation of their children; and no one loves what is not known, nobody loves what, because of ignorance, is indifferent to him; that is why our legislators have decreed the teaching of national history in all the schools" (1871:4). The explicitly stated aim to instil pride and love of the nation in the young through the teaching of history is therefore what at once characterises Eufemio Mendoza's work and distinguishes it from the other national history textbooks of the period.

Like Roa Bárcena's *Catecismo elemental de la historia de México*, Mendoza's *Curso* is divided in three sections; one dealing with "the period that concludes with the Spanish conquest", another devoted to "the foreign domination until the total independence of the nation" and a final part "from this glorious epoch to our days, all this preceded by some indispensable general notions" (1871:6). Thus, while the way to divide and organise the history of the country might be the same as that employed by Roa Bárcena, Mendoza's language reveals a totally different approach to the same periods. Unfortunately, from the complete work, only the section on general notions with which the *Curso* begins was available for consultation. Nonetheless, the content of this part as well as the introductory comments is so rich that it provides a good panorama of the author's political orientation as well as of the idea of the nation he aimed to diffuse through his book.

Like Roa Bárcena's work, the *Curso* begins with a section on the geography of the country. In it the physical characteristics of the territory occupied by both the pre-Hispanic peoples and the Mexican nation are discussed side by side, thus creating a sense of continuity between pre-conquest and independent Mexico. However, as becomes apparent in a later section of the text, for Mendoza this continuity is, as will be seen below, far more than territorial. Just like its model, the *Curso* refers later on to the natural wealth of the country and, in what a critical eye might identify as plagiarism, even reproduces integrally Roa Bárcena's assertion that "[Mexico's] soil is among the most fertile in the world and the great variety of its climates renders the variety of its vegetable products equally infinite."[54] Surpassing Roa Bárcena in national pride, however, Mendoza adds: "few countries can compete with Mexico in its wealth of the three realms of nature" (1871:18). It is in fact the review of the characteristics of the flora, fauna and mineral world of Mexico that leads Mendoza to conclude with a phrase that is meant both to instil patriotic pride in the students and exhort them to work towards the establishment of the conditions in which the *patria* can flourish. "[...] As you can see" –admonishes Mendoza--, "our *Patria* has the means to attain –under the conditions of peace, which it has unfortunately lacked—enormous prosperity" (1871:23).

[54] Roa Bárcena himself used exactly this sentence in both his geography and history textbooks. See: Roa Bárcena, *Catecismo elemental de geografía universal...*, p.112 and Roa Bárcena, *Catecismo elemental de la historia de México...*, 1880, p.11. Mendoza reproduces these words –without quoting Roa Bárcena- - on page 20 of the *Curso de historia de México*.

The description of the country's geography is followed by an analysis of the "races" that inhabited/had inhabited the Mexican territory. This section of the available text of the *Curso* undoubtedly provides the clearest insight into the political inclinations of the author, as well as into the way in which he conceived the Mexican nation, as it is here that Mendoza expresses his views on the pre-Hispanic peoples, particularly the Aztecs, the Spaniards and, tangentially, the conquest.

In this part, a close and lengthy look at different pre-Hispanic groups precedes the depiction of the Aztecs as the people whose "constancy and national love induced by, or rather, identified with the religious spirit made of them [...] the masters of Anáhuac" (1871:68). The idealisation of the Aztecs apparent in this portrait is a feature of the *Curso* which can be felt throughout the text and becomes particularly clear by comparison with the description of their Spanish antagonists. Mendoza depicts the Spanish conquerors and colonisers as ignorant, ruthless and avaricious adventurers (1871:68-69), who arrived in Mexico from a backward Spain, "the last one among the European nations to enter, albeit involuntarily, into the philosophical knowledge [*sic*] which brought about the reform of the fifteenth and sixteenth centuries" (1871:71). And again, in what appears to be a reply to Roa Bárcena, the author rejects the idea that in Mexico there existed anything like a "pure Spanish race", insofar as "during the first years of Spanish domination only men colonised the country and all [of them] took Mexican women", whose children then formed the *criollo* race (1871:69 and 71). This assertion is worth highlighting, as not only does it totally rebuff the conservatives' claim to "whiteness", but also, and more importantly, it emphasises the mixed origin of the Mexican population.

From Roa Bárcena, Mendoza reproduces the opinion that the indigenous race, "because of the violence of which it was victim during the conquest and throughout the colonial rule [...] ha[d] degenerated in its old qualities and, generally speaking, remain[ed] detached from the intellectual movement" (1871:77).[55] Yet, in contrast to Roa Bárcena and displaying his conviction that the indigenous peoples were not essentially backward, as well as his liberal faith in education, Mendoza adds that such marginalisation was "regrettable" and "[could] only be overcome by a determined protection of [this race's] education" (1871:77). Furthermore, in his appraisal of the indigenous peoples Mendoza goes a step further and draws attention to the fact that those members of this "race", who had had the opportunity to "join in the intellectual

[55] This is literally reproduced from the *Catecismo elemental de historia de México*, 1880, pp.18-19.

movement" had stood out "for their talent and intelligence" (1871:77). The picture of the indigenous population that Mendoza presents is, therefore, a favourable one.

About the "mixed or *criollo* race" Mendoza has less to say. He depicts it as "intelligent and educated", but mentions that this "race" was also "often criticised for lacking energy and determination in its enterprises" (1871:77-78), thus repeating Roa Bárcena's judgment while distancing himself from it. Finally and paradoxically, although a few pages earlier Mendoza explicitly states that he does not accept the existence of a white race, in his classification of the races of Mexico he includes the category of "white". Yet, the inclusion of the "white class" as a category appears to fulfil no other function than providing an opportunity to strongly criticise those who claimed to belong to this group. Indeed, in a characterisation that displays Mendoza's popular orientation, the "pure white", "Spanish or 'decent' class –as it prefers to call itself" is dismissed as "nothing more than the aristocracy of money, which is the most despicable of all aristocracies" (1871:78).

Significantly, the *Curso* says little about the religion of the country, and focuses, instead on the issue of its languages. The nationalistic inspiration of the author as well as his conception of the Mexican nation as one which descended from the Aztec people appears in this section with absolute clarity. For Mendoza, in fact, the language which firstly and naturally deserved to be mentioned was "the Mexican [i.e. *Náhuatl*] one",[56] as it was, according to the author, the language with which the "nation [was] identified", not only because is was "named after the nation", but also because it was, in a way, a reflection of all things Mexican. As Mendoza asserts, "part of [Mexico's] historical and geographical names is written in this language; [...] the natural products of our soil have mostly Mexican names; [...and...] while we write and speak, we Mexicanise our words" (1871:92). But it was not only its relationship with the nation which accounted for the preeminent place Mendoza accorded the Mexican/*Náhuatl* language in his relation of the tongues of the country. The merits of the language itself, i.e. its "beauty" and "expansive force" *vis-à-vis* other languages (1817:92) also rendered Mexican/*Náhuatl* superior in the eyes of the author. Moreover, Mendoza's pride in the pre-Hispanic language leads him to affirm that "according to respectable persons, [*Náhuatl*] surpasses Greek and Hebrew, [in that it] enjoys from their advantages and approximates more than any of them the beautiful ideal of the philosophers: that each word describes the object to which it is applied" (1871:93).

[56] *Náhuatl* was the language spoken by the Aztecs before the conquest.

That this whole description is driven by a deep sense of pride is undeniable; that this sense of pride derives from the conviction of being the descendant of the people who gave birth to this language becomes evident in Mendoza's admonition: "Now you see the philological wealth of the language of our forefathers [...]" (1871:94).

Mendoza's admiration of the Mexican language does not prevent him, however, from stating that it was, in turn, the Spanish/Castillian language, introduced by the conquerors, which could be called "national", because it was spoken widely throughout the Mexican society, even by the indigenous peoples in their "relations with the mixed race", and was used in schools and official documents (1871:99). Nonetheless, the author's national pride emerges again to highlight the superiority of the Spanish spoken in Mexico over the one spoken in the Peninsula itself, as, according to the author, Castillian was spoken in Mexico with more purity than in many Spanish provinces and its pronunciation had been improved by its contact with the *Náhuatl* language (1817:99). Regretting that Castillian and not an indigenous language should be the official language, because "one of the distinctive characters of nations, and that which most strengthens the relations among the citizens and sustains the love of the *patria* is the possession of an own national language" (1871:100), the author concludes by exhorting his students to learn about the indigenous languages and other treasures of the Mexican nation.

The long introductory section of the *Curso* ends here. How Mendoza approached the different events and developments in Mexican history is a question that will unfortunately remain unanswered in this work. Nonetheless, the "indispensable general notions" that Mendoza provides are enough to see that the author held and aimed to diffuse through his work an idea of the nation fashioned along the liberal lines.[57] First, although the role of institutions is not highlighted in the introductory section, Mendoza's language is clearly one of republicanism: the Republic, the citizens and the *patria* are all important elements is his reading. Moreover, it was with the openly declared aim to contribute to the support of the Republic by instilling in its children the love of the *patria* that Mendoza set out to write his work. Secondly, the emphasis on the people is tangible throughout the analysed section of the book. Mendoza's portrayal of Mexico as a democratic republic in whose affairs all citizens

[57] This is confirmed by the interpretation of Mexican history from the conquest to the defeat of the empire that Mendoza offered in a 1874 speech on the anniversary of independence. Eufemio Mendoza, "Discurso cívico pronunciado por el C. [...] en el Gran Teatro Nacional de México la noche del 15 de setiembre de 1874" in *El Monitor Republicano*, Mexico City,18 September 1874.

participated and his evident aversion to the aristocracy reveal that the "popular dimension" was, in fact, a clear component of the author's idea of the nation. Thirdly, not only the idealisation of the pre-Hispanic past, but more significantly the assumption that the Mexicans are descended from the Aztec people are present in the *Curso*, thus reflecting in full the conceptualisation of the Mexican nation that had begun to emerge in the official rhetoric of the Restored Republic.

An openly liberal and nationalistic work, Eufemio Mendoza's *Curso* presaged the national history textbooks that were to dominate the educational scene in the decades to come. With its insistence on the mixed origin of the Mexican people and its revalorisation of the Aztec people not only as a matter of antiquarian curiosity but as statement of the ethnic origin of the Mexican nation, the *Curso* anticipated the conception of the Mexican nation that would become dominant during Porfirio Díaz's rule. A remarkable text, especially for its unusual nationalistic approach, the *Curso* does not appear to have had any influence beyond the walls of the *Liceo de varones* of the State of Jalisco, to whose students the work was originally addressed.

5.3.6 Manuel Rivera Cambas' *Cartilla de historia de México* (1873)

Three small volumes compose the *Cartilla de historia de México*[58] published by Manuel Rivera Cambas in 1873. Specifically conceived as a textbook for "the schools of the Republic" and written in the form of a catechism, the *Cartilla* offers a compressed account of Mexico's history beginning with the first inhabitants and culminating with the latest political events of the early 1870s. As with most catechisms, the system of questions and answers employed in this work facilitates the presentation of the information in an orderly and succinct manner, but at the same time, makes it difficult to explore any issue in depth, and thus results in a superficial and, on occasions, hurried narrative of events. This notwithstanding, and despite the fact that Rivera Cambas refrains from judging the history he set out to recount, its is possible to place the *Cartilla* among those texts which rehearse a liberal interpretation of the country's history.

Beginning with the usual examination of the first inhabitants of the country, Rivera Cambas looks at the Toltecs, whose morality and civilisation he highlights, and

later on, at the Aztecs. The habitual mention of the religion of the Aztecs and the human sacrifices they performed is also present, although free from any condemnation. In turn, Rivera Cambas seems rather to seek to highlight these people's morality by stating that they "recognised the existence of the Supreme Being" (1873:I:14). Why Rivera Cambas tried to vindicate the Aztecs by stressing their belief in a god who resembled that of the Christians is, however, not clear, especially since the author does not draw any genealogical continuity between the Aztec people and the Mexican nation. Yet, in an imprecise way, which characterises not only Rivera Cambas' but also many other works, the *Cartilla* suggests the existence of a relationship between the Aztec people and the Mexican nation. This becomes evident in the account of the conquest, where the author's sympathies appear to be on the side of the Aztecs. For one thing, in the *Cartilla* the Spaniards are depicted as cruel not only towards the indigenous peoples, but also towards each other (1873:II:3). For another, while Hernán Cortés is described as a cunning and persistent man who was, nonetheless ambitious, ungrateful and cruel (1873:I:20 and 26), Cuauhtémoc, the last Aztec king is, portrayed as being extremely brave and having a "great soul" (1873:I:48).

As in most of the textbooks of the time, in the *Cartilla* the colonial epoch is presented simply as a chronology. Although the picture of the three centuries of colonial rule is rather neutral, the author does emphasise the economic benefits that Spain derived from New Spain as well as the burden that the payment of tribute to the Crown represented for the indigenous peoples (1873:II:27). In this sense, the work conveys an image of the colony as a system of exploitation. It is, in fact, the economic aspects that Rivera Cambas also stresses in his account of the motives that led to the desire for independence in New Spain.

The *Cartilla* gives a brief overview of the independence movement. In it, Rivera Cambas' preference for the popular movement becomes apparent in the characterisation of the leaders of the different phases of the insurrection. In congruence with the liberal interpretation that underlies all the work, Hidalgo is given the appellative "patriot priest" and described as "prodigal with his money, inclined towards fostering industry and agriculture and loving to the Indians" (1873:II:37). Morelos and Guerrero, in turn, are the object of equally good appraisals. Iturbide, by contrast, is presented as a cruel and opportunistic man who "with indefatigable activity and notable success [...] combated the first leaders of our independence movement" (1873:III:2).

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[58] Manuel Rivera Cambas, *Cartilla de historia de México para uso de las escuelas de la República,*

A hurried look at the years of independent national existence constitutes the subject of the third volume of the *Cartilla*. In it the unrest, disorder and the continuous succession of governments as a result of uprisings, proclamations and *coups* are well depicted. It is indeed the internal politics which seem to be the author's main interest, to such an extent that even the international wars in which Mexico was involved during the first half of the nineteenth century are seen through the looking glass of domestic politics. As an illustration suffice it here to reproduce the reference Rivera Cambas makes of the Mexican-American war:

> [Q:] Did we then have any foreign war?
> [A:]Yes, with the Northern Republic, because Mexico had declared that it would consider the annexation of Texas a cause of war.
> [Q:] While the foreigners invaded us, were there any lamentable incidents?
> [A:] Yes, as a consequence of the law of secularisation of Church property issued by Congress [...] several squads of the national guard, which were supposed to aid in the defence of Veracruz, rose up against the government and made the scandalous spectacle of killing their brothers in the presence of the invader [...] (1873:III:40).

In this brief reference to the war the emphasis is placed not on the causes of the conflict or even on the criticism of the neighbour state, but rather on Mexico's internal situation. Of the many "lamentable incidents" that could have been recounted here, Rivera Cambas chose to concentrate on the *polko* rebellion and present it in such a way that the American invasion itself loses importance in the face of the internal division and disunion that impeded the effective defence of the country.

Five pages cover the period 1855-1864 (the last pages of the work were missing in the consulted copy). In them those eventful nine years are reviewed as a succession of uprisings, which makes it difficult to discover what the views of the author were about the occurrences of that period. If anything, in these pages it is possible to find a final, albeit marginal, confirmation of the author's liberal persuasion in his qualification of the laws of Reform as "remarkable" and his reference to the conservatives as "reactionaries" (1873:III:445).

The *Cartilla de historia de México* provides, thus, a quick overview of Mexico's history guided along liberal lines, which however does not offer a clear picture of any idea of the nation. In fact, although Rivera Cambas favours the popular movement for independence over the final stage led by Iturbide, he does not imply or

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(escrita por [...] y dividida en tres cuadernos), Mexico City, Imprenta de J.M. Aguilar Ortiz, 1873.

suggest that the proclamation of independence was either the birth or the re-birth of the Mexican nation. Similarly, while the portrayal of the Aztecs is a positive one, the nature of the relationship between these people and the contemporary Mexican people does not become apparent. As with most of the authors of his time, for Rivera Cambas the Aztec past was one that must be mentioned, but the reasons why this should be so are neither implicitly nor explicitly made clear. As regards the diffusion of the book itself, in spite of the dedication to the "schools of the Republic" and of its author's good relations with influential members of the liberal elite,[59] no evidence was found that private or public schools used it as a textbook.

5.4 Final considerations

The emergence of the new concept of national public education that gradually occurred after the restoration of the Republic brought with it the need for new textbooks that were accessible to the Mexican people and reflected the Mexican reality. This meant, for one thing, that these works had to be written in a language the Mexicans could understand. As was seen in chapter four, public instruction during the *Reforma* and the Restored Republic basically reached the middle and lower-middle classes of urban Mexico. Unlike the scattered indigenous populations, who spoke a variety of native languages, urban children spoke Spanish. Since it was to them that the new textbooks were addressed, the language in which these works were written was, consequently, Spanish. For another thing, the new textbooks were meant to deal with Mexican themes and to portray the Mexican reality. Triggered by the establishment of the new curricula for both primary and secondary instruction, which required the teaching of subjects with a national emphasis such as civics, national geography and national history, the publication of textbooks for these subjects experienced a remarkable increase after 1867.

There was great variety in the works published during the *Reforma* and Restored Republic and that were used as textbooks after 1867; this reflected an equally great intellectual diversity. Insofar as these books mirrored the views of authors of all

[59] Like Manuel Payno, Rivera Cambas wrote to Mariano Riva Palacio to publicise his books. For an example of the presentation of the earlier work, *Historia de Jalapa y revolución del Estado de Veracruz*, see: Manuel Rivera Cambas a Mariano Riva Palacio, Mexico City, 14 November 1869, Mariano Riva Palacio Collection, 8254, *BLAC*.

political persuasions, they contributed in differing degrees to the dissemination of the idea of the nation that the liberal elite entertained.

For instance, Nicolás Pizarro's *Catecismo político constitucional* clearly and explicitly rehearsed the liberal idea of the nation. Its focus on the main elements of the Mexican political and institutional system, its highlighting of the 1857 constitution as a cornerstone of the Mexican nation, its popular orientation and, perhaps more importantly, its manifest support of the liberal camp in the context of the still-developing civil war, leave no doubt as to the idea of the nation this text aimed to disseminate. As the only existing textbook for the subject of civics since 1861 and throughout the Restored Republic, Pizarro's work informed the views of virtually all Mexican children who received civic education in federal and innumerable state and municipal public schools throughout the Republic. Yet, just as it is clear that public school pupils might have been imbued with the liberal idea of the nation through Pizarro's *Catecismo*, it is certain that most private school pupils were not exposed to Pizarro's views, for civic education was usually absent from the curricula of private schools.

National geography textbooks, in turn, fulfilled the relatively uncontroversial task of familiarising the children and youth with the features of the Mexican territory. However, in exploring the characteristics of the Mexican geography, these works also provided ample opportunities to instil in the pupils the love of the soil through the celebration of the beauties and richness of the Mexican land. In this sense, the works of both Antonio García Cubas and José María Roa Bárcena, the two authors that dominated the teaching of geography during the Restored Republic, contributed to the diffusion of a territorial conception of Mexico that could hardly be related to either the liberal or the conservative formulation. By contrast, the subject of human geography, which only Roa Bárcena explored in his texts, provided a forum in which a more clearly partisan idea of the nation could be disseminated. It was, thus, through the reference to Catholicism as the religion of the country, as well as through the classification of Mexico's "races" that explicitly avoids establishing any genealogical continuity of the Mexican nation with the pre-Hispanic past, that Roa Bárcena's conservative idea of the nation becomes apparent. At the end of the day, however, the reach of Roa Bárcena's was rather modest. For while national geography was widespread in both public and private schools –and in, fact, a little more so in the

latter—it was García Cubas' works, and not Roa Bárcena's, which were most commonly used in public and private schools alike.

Finally, the fact that national history –the subject of most recent adoption and least uniform expansion throughout the Mexican education system—should be the one on which the most textbooks were written during the 1857-1876 period attests to the passion that the narration of Mexico's past awoke. Although after the restoration of the Republic there emerged an initial official view of the history that was to be told, this was by no means uncontested, and nor was it immediately appropriated even by those Mexicans who claimed to be of liberal persuasion. This is demonstrated by the myriad interpretations of the history of Mexico that are featured in the textbooks analysed in this chapter. While, for instance, Roa Bárcena's *Catecismo elemental de la historia de México* put forth a moderate view of Mexican history which is recognisably based on the conservative idea of the nation, Eufemio Mendoza's reply to this work, the *Curso de historia de México*, offered a passionate interpretation in which the liberal idea of the nation is constantly evident. On the whole, however, these two works are the exception rather than the rule. Most of the textbooks of Mexican history written during the period in question tend to rehearse the liberal idea of the nation insofar as they either condemn or disregard the Spanish colonial rule, privilege the popular movement over the *criollo* attainment of independence and exalt the republican/democratic institutions of *Reforma* Mexico. The other element of the liberal idea of the nation, what in chapter three has been called "the ethnic substratum", is, however, not embraced with equal enthusiasm by all authors. As a matter of fact, in most of the consulted texts the relationship with the pre-Hispanic past as an element of the Mexican history appears to be problematic. Even Manuel Payno's *Compendio de la historia de México*, the most widely circulated text in both public and private schools and the only one which enjoyed the status of official textbook in a great many public schools, points to the significance of the Aztec past, but falls short of suggesting a relationship of ethnic descent between the pre-Hispanic peoples and the modern Mexican nation, as the liberal rhetoric of the time claimed.

In the final analysis, it is clear that the textbooks discussed here contributed unevenly to the dissemination of the liberal idea of the nation, as works that reproduced the conservative idea of the nation were widely circulated, as were textbooks which, though tending to the liberal conceptualisation did not reproduce it in full. It would only be after decades of Porfirian education and the concerted efforts of the subsequent

Revolutionary governments, that the state elite would finally be able to transmit a comprehensive and uniform idea of the nation through state schools. Even then, however, private education would provide a platform from which alternative ideas of the same nation would be diffused among young Mexicans.

CONCLUSIONS

In this work I have highlighted the role that institutions play in the dissemination of the idea of the nation. I have argued that an analysis of the operation, reach and limits of the institutions through which the elites promote their ideas of the nation can provide useful insights into the discontinuities and transformations that these ideas suffer in the process of their diffusion. In order to illustrate this process, I have focused on the case of *Reforma* Mexico and have explored the reach and limitations of the education system in disseminating the official version of the nation. In the following pages I would like to summarise the main conclusions of the study and offer some final comments.

First, the work pointed out that elite-centered approaches to the study of nationalism –and, by extension, to the study of the idea of the nation—are limited and must be complemented by an analysis of institutions. While this study accepted the view that the idea of the nation has its origins in the elites, it also showed that focusing exclusively on the elites can lead the observer wrongly to equate their ideas of the nation with those of the people. The work further claimed that an analysis of the institutions through which the elites seek to disseminate their ideas of the nation can help to overcome this shortfall of one-sided elitist approaches.

The study also highlighted the fact that within any given or aspiring nation there are bound to exist several competing ideas of the nation embraced by different, contending elites. In the case of *Reforma* Mexico, two main formulations were identified. The first was the conservative idea, which was mainly an ethnic conception based on pride in the Spanish origins of Mexico. This conception presented the Mexican nation as a community of descent united by the superior culture and religion inherited from Spain. This view had two striking implications: for one, that Mexico was not essentially different from New Spain, insofar as it was culturally, religiously –and, for some exceptional conservative observers, even racially—Spanish, albeit transplanted to America; for another, that Catholicism was central both as a source of unity within a deeply divided society and, perhaps more important, as the essence of the Mexican nation itself.

The second was the liberal idea of the nation, which was based on an understanding of the nation as a community of citizens, in which the institutional and

legal frameworks were of paramount importance. In this formulation, the 1857 constitution was seen as the embodiment of the values of the Mexican nation. Also important for this formulation was the conception of the people as the repository of sovereignty. This civic idea of the nation was, however, complemented by an ethnic element. Especially prominent after the defeat of the empire in 1867, but present since the late 1850s, the Aztec past was portrayed by the liberal elite as the original source of sovereignty of the Mexican nation.

At this point, I would like to say a word about the differences and similarities between the conservative and the liberal conceptions of the nation. To begin with the differences: it is clear that the conservative conceptualisation of Mexico was past oriented and sought to preserve what the conservatives deemed the essence of Mexico embodied in the Hispanic culture and the Catholic religion. The liberal idea of the nation, in contrast, was future oriented and aimed to create a nation of citizens that had hitherto only existed in the liberals' minds. It is also evident that the conservative idea of the nation conceived of Mexico as Europe transplanted to America and was specifically based on pride in the European origins of Mexico. The liberal formulation, in turn, emphasised the American character of the Mexican nation and its institutions, and took pains to locate the birthplace of the nation in the American continent itself. Interestingly, however, alongside these striking differences, the two ideas had subtle affinities.

For one thing, while both fed on Creole patriotism,[1] they also constituted, at the end of the day, a rejection of this very form of patriotism. Thus, if the conservative idea of the nation reflected a nostalgia for the New Spanish past, as well as an aspiration to preserve some of the elements of the New Spanish social order, it strongly repudiated the notion that New Spain was in any way related to the pre-Hispanic peoples that had inhabited the territory prior to the arrival of Hernán Cortés. By the same token, if the liberal idea of the nation traced a line of continuity between the Aztec past and independent Mexico –just like Creole patriotism had seen in the Aztec empire the progenitor of New Spain—, it sought, above all else, to get rid of New Spain and build upon its ruins a modern, democratic nation of citizens.

[1] As will be recalled, Creole patriotism was articulated around the pride in the natural beauties of America, the sense of election afforded by the cult of Guadalupe and the adoption of the Aztec past as the Mexican classical antiquity. These elements provided the New Spanish *criollos* with a base from which to launch their claims to be recognised as equals with the peninsular Spaniards and to self-rule – albeit always within the framework of the Spanish Crown. See above pp.67-69.

For another thing, the conservative and liberal ideas of the nation –indeed like Creole patriotism itself— were conceptions based on the understanding, interests and projects of actual or aspiring centralising elites. In other words, the liberal idea of the nation, as much as the conservative one, disregarded the ethnic diversity of the Mexican people and the variety of their local attachments and identifications, and entailed, therefore, the imposition upon the rest of the country of an idea forged at the centre.[2] This was particularly evident in the educational efforts of the liberal state after the restoration of the Republic. In fact, despite the liberals' espousal of federalism in education and their enunciation of the principle of freedom of teaching, their tendency was to increase the control of the central government over public education throughout the Republic. With this they aimed to provide a general orientation to the instruction offered in all public schools that sought to consolidate the state around the national form envisaged at the centre.

In this study I have also suggested that education was a key arena in which rival ideas of the nation were given expression. Because it was born as an institution with the aim of solidifying the state around a national form, education was—and remains today—a powerful instrument for the transmission of the values of the nation and, therefore, coveted by rival elites in their struggle for power.

With respect to the case of Mexico during the Restored Republic, this work has shown how the liberal state took pains to promote through education the idea of Mexico as a civic, republican, democratic nation, with roots in the Aztec past. My analysis of the educational policies of the liberal state, as well as of the reach of the nationally oriented curriculum suggested that the efforts of the liberal state met with very modest results. Various factors were identified that account for this. First, structural conditions, such as the distribution of the population throughout the territory, combined with a shortage of public resources, led to a concentration of the state-funded educational establishments in the cities. In a country where the great majority of the population was rural, this meant that only a very small proportion of the population in school age was exposed to the liberal educational project. Secondly, within this already limited reach, the fact that public instruction was federally organised –that is to say it put primary education under the control of the individual states—, meant that the curricula of public schools were by no means uniform. As a result, the nationally oriented subjects often failed to appear in the study plans of the states' schools. Finally,

[2] See: Timothy E. Anna, *Forging Mexico, 1821-1835*, Lincoln and London, University of Nebraska

the liberal espousal of the principle of freedom of teaching, while increasingly overlooked when it came to public instruction, was always honoured in the case of private education. The leeway that private schools had to establish their own plans of study resulted in varied curricula, which, as a rule, excluded the subject of civics, cornerstone of the liberals endeavour to create citizens through the school, and often reflected views of the nation that were different to the state's.

If this alone points to the significant obstacles encountered in the diffusion of the liberal idea of the nation through education, the content analysis of the civics, national geography and national history textbooks offered in this dissertation further confirmed the irregular diffusion of this idea. For even if openly conservative textbooks were the exception, those which in general terms subscribed to the liberal elite's notion of the Mexican nation fell short of reproducing all the elements of the liberal conceptualisation. Notably, the claim that the Mexican nation was descended from the Aztec people was less often and less forcefully echoed than any other aspect of the liberal idea of the nation or of the liberal interpretation of Mexico's history.

The analysis also pointed to the fact that some of the gaps left, willingly or not, by the state were used by private schools to disseminate values that were different from those that the state endorsed. These values were mostly Catholic. While this does not imply that in transmitting Catholic values private schools reproduced the conservative idea of the nation, it does suggest that private education sought to promote the values that the liberal elite was determined both to separate from the idea of the nation and to confine to the private sphere.

It is clear that the results of the liberal state's educational efforts fell far behind the aims stated in the rhetoric, plans and laws. In fact, one might even be tempted to conclude that the impact of the liberal attempts at promoting a particular view of Mexico through the schools was –if anything—marginal. It is important to stress, however, that the liberal state, aware of its limitations, began by attempting to use education to create citizens out of those Mexicans who inhabited the cities and, even more forcefully, those young men destined to join the country's political elite. Democratic and popular in inspiration, the educational project of the liberal state was, in its impact and reach, elitist. As with other features of Mexican liberalism of the *Reforma* period, the enunciation of the popular and democratic principles in education

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Press, 1998, p.15.

contrasted with a reality in which not the people as a whole, but rather a minority benefited from the state's policy.

Finally, the findings of this study suggest the need to revise one of the dominant approaches to the study of nationalism. I refer here to Ernest Gellner's functionalist theory. On the one hand, my analysis of the educational efforts of the liberal state supported Gellner's thesis about the importance of state-led, mass public education in the creation and imposition of a "high culture" on society. On the other hand, however, the theoretical discussion presented in chapter one revealed that Gellner's claim that education creates nationalism must be qualified. For if it is undeniable that the system of mass public education is a highly effective medium for the diffusion of nationalism, it is also true that modern state-led education is a product of the state elites' interest in solidifying the state around a national form and therefore, could be said to be inspired by nationalism. Moreover, Gellner's approach fails to consider the limited reach of public education systems, as well as their permeability, both of which are factors that facilitate the reproduction of values that do not necessarily coincide with those of the state.

In sum, in this dissertation I have aimed to demonstrate, through the example of education in *Reforma* Mexico, the centrality of institutions for the diffusion of the idea of the nation. In so doing, I have sought to qualify the elitist approaches that currently dominate the scholarly literature on nationalism. While taking the elites as a point of departure, I have proposed an intermediate level of analysis which takes account of the discontinuities in the process of the transmission of the idea of the nation. Ultimately, therefore, the results of my study spell out a warning, as they suggest that every official idea of the nation that presents itself as absolute is likely to be a product of contestation and a long and difficult process of institutionalisation.

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