Myths and [mis]perceptions
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The Understanding between Mexico and the United States

Experts who explore the relationship between Mexico and the United States cannot ignore the marked contrasts between the two nations. Although the two countries share an extended border and important interests, their ethnic, religious, and cultural origins, models of political and economic organization, and historical evolution are all profoundly different.

Although the relationship has been studied extensively, many aspects remain unclear and paradoxes unresolved. Of particular interest is the fact that, after the Mexican Revolution of 1910-17, Mexico followed policies that diverged from the paradigms set down by the United States. That is, Mexico pursued an independent foreign policy in which the United States was viewed as a potential threat; its economic model was a mixed property regime in which the State played an active, clearly protectionist role; and its one-party, authoritarian, corporatist, and presidentialist political system bore no resemblance to the liberal paradigms that prevailed in the United States.

Given Mexico’s importance for the United States and the United States’ intolerance toward divergent tendencies, especially during the Cold War, how can we account for the U.S. strategists’ indifference, even cordiality, rather than hostility or alarm, toward the Mexican elite? How was the Mexican leadership able to develop and implement such a divergent model in the very shadow of the United States? We may be able to answer these questions by approaching the relationship from another perspective.

Underlined by the fact that only Mexico and Canada fall under the jurisdiction of the Joint Chiefs of Staff, while other nations in the hemisphere are assigned to the Southern Command.
THE HISTORICAL LEGACY

Different cultural and political systems and marked asymmetries in power have created a legacy of stereotypes and a jumble of love and hate, admiration and fear, attraction and disdain between these two frequently nationalistic and racist societies, forced to coexist in geographic contiguity. In the early centuries of the two nations' common history, the colonies that would become the United States were the weaker party and New Spain was the regional power, but their respective population centers were so distant from one another that this power inequality left virtually no mark. Mexican and U.S. histories began to clash only after both nations had won independence.

After independence, the United States established a highly novel form of political organization that was widely copied by groups wishing to transform their own societies. These emulators included the leaders of the Mexican independence movement. Because the U.S. elite's interests in Mexico were limited to its material resources, the U.S. reaction to the Mexican struggle was largely one of indifference, almost certainly symptomatic of a deep U.S. contempt toward Mexicans, who inherited the stereotypes originally applied to the colonizing Spaniards: cruel, lazy, "corrupt, and effeminate" (Vázquez 1984). This was the basis for a widespread belief that Latin Americans are incapable of developing viable democratic governments. For John Adams, "democracy [could not be established] amongst the birds, the beasts, the fish, or the peoples of Hispanic America" (in Vázquez 1984). Such reasoning was frequently used to justify the exploitation of an inferior nation (Mexico) by an exceptional people (the United States), who believed that in dominating a weak population they were fulfilling their historic duty.

There is an interesting parallel between the United States' concept of "manifest destiny" and the Communist Manifesto. Underpinning both views of history is an innate belief in the respective actors' exceptional character and predestined role as mankind's redeemer. These ideas would ignite a smoldering confrontation between two opposed worldviews; they would also be used to justify widespread atrocities.

In 1848, Mexico, weakened by internal conflict and defeated on the battleground, was forced to cede half of its territory to the United States,\(^2\) inflicting enduring scars on the Mexican consciousness and modifying Mexican attitudes toward the United States. Although Mexico had lauded the American experiment during the early decades of the nineteenth century, after its defeat in the Mexican War, the country turned inward and did its best to ignore its northern neigh-

\(^2\)It was long held that the Mexican government was responsible for the war of 1846–47. See U.S. Army 1963.
bor. One consequence was Mexico's failure to study the United States, a shortcoming that persisted well into the 1970s (Cosío Villegas 1968; Vázquez 1985). This was an unwise course of action, because it meant that Mexico also failed to develop appropriate instruments with which to defend its interests.

Moreover, ignoring the United States did not make that country disappear. It continued to figure in the calculations and obsessions of Mexico's ruling elite, who have always had to negotiate and strike agreements with this dominant power more accustomed to taking unilateral action.

THE UNITED STATES AND TWO REVOLUTIONS

Early twentieth-century Mexico posed no serious concern for the United States. Although it was ravaged by dramatic social problems, Mexico enjoyed economic growth under dictator Porfirio Díaz, who governed hand-in-glove with foreign interests. The U.S. elite saw this as the ideal regime for a people incapable of governing themselves.

The Mexican Revolution elicited a different, though not enduring, attitude in the United States. President Woodrow Wilson sympathized with the revolutionaries and believed that they would demonstrate the viability of democracy for the Hispanic American nations. To aid Venustiano Carranza in his struggle against Victoriano Huerta, Wilson invaded Veracruz, manipulated weapons deliveries, and played the trump card of diplomatic recognition. However, Wilson's experiment in support of democracy faltered when the United States began gearing up in 1917 to enter World War I. The Bolsheviks' triumph in Russia that same year completely reversed U.S. opinion concerning the Mexican Revolution.

The nearly simultaneous revolutions in Mexico and Russia show certain parallels. After the Bolsheviks' October revolution, the United States expressed its distaste for revolutionary democracy or dramatic transformations, always preferring gradual, peaceful change within a formal democracy where economic growth is encouraged by means of an absolute respect for private property, the private sector, and contractual agreements (especially those signed by the nation's citizens).

In the late 1920s, the United States finally came to terms with the Mexican Revolution, although it continued to condemn the Soviets. This two-dimensional outlook reflected the differences between the two social transformations. Not only did the Bolsheviks do everything in their power to eliminate private property from the means of production and to eradicate class differences and liberal democracy, they also sought to export their model around the world, leading them to a head-on collision with the United States and other Western powers.
In the case of the Mexican Revolution, the United States' initial hostility was largely a result of the economic nationalism espoused in Article 27 of the Mexican Constitution, as well as the foreign policy principles embodied in the Carranza Doctrine: juridical equality among all nations, nonintervention, self-determination, and domestic control over natural resources. The factors that ultimately led London and Washington to accept the Mexican Revolution are key to the understanding that still regulates the U.S.–Mexico relationship. One factor was the moderation and pragmatism of Mexico's victorious "Sonora dynasty." Unlike the Bolsheviks, their economic policies did not contemplate doing away with private property. Although they did not seek to establish a democratic system, this was of marginal concern to the majority of the U.S. elite, who still believed—as did U.S. Ambassador to Mexico James Sheffield—that the Mexicans were "Latin Indians," incapable of understanding "any argument save brute force" (in L. Meyer 1985: 22).

The Mexican Revolution mined a prominent vein of nationalistic feeling fed by abuses inflicted by foreigners, especially Americans. This nationalism, a source of cohesiveness among the Mexican population, was embodied in statements such as the Carranza Doctrine. As Arnaldo Córdoba has argued, Carranza's "aim was to recover Mexican wealth from foreign hands, providing the nation with an independent model for development and the world with an image of the 'real' Mexican society," composed of "peasants and workers" (in L. Meyer 1972: 203–12). The revolutionaries did not seek to break with any of the powerful nations of the time, including the United States; they merely hoped for the respect they felt they deserved.

Although the Mexican revolutionaries were certainly nationalistic, they were also pragmatic men of power who hoped to consolidate and maintain their positions and implement their political programs. To this end, they had to take the needs and concerns of Washington and other powers into account. In order to implement their agrarian reform program or to recover at least some measure of control over the nation's natural resources, the revolutionaries desperately needed diplomatic recognition, and they were prepared to make concessions to win it. In the Bucareli Agreements of 1923, certain points of Article 27 were dropped, and the government of Álvaro Obregón made concessions regarding repayment of the nation's external debt and regarding another thorny issue: legal claims stemming from American losses during the conflict. In return, Washington recognized the revolutionary government, allowing Obregón to stand for reelection.

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7Key texts on this topic are L. Meyer 1985, 1991. The author's conversations with Lorenzo Meyer also proved extremely enlightening.
the following year (L. Meyer 1985: 17). Even so, the Bucareli Agree-
ments did not resolve the differences between the two countries.

TOWARD AN UNDERSTANDING

Plutarco Elías Calles, president of Mexico from 1924 to 1928, initially
mined the radical vein of the Revolution, creating serious tensions
with the United States. By mid-1925, Mexico–U.S. relations were
badly deteriorated, to the point that the Department of State asserted
"the Mexican government was on trial before the rest of the world"
and Ambassador Sheffield called Calles a "murderer, a thief, and a
man who has broken his word of honor" (in L. Meyer 1972: 223). As
for U.S. opinion on the other revolutionaries, a cable stated that the
only thing differentiating government officials from bandits was "the
line between success and failure" (in Melzer 1987: 6). This hostility
stemmed from U.S. uneasiness with instability, a deep nostalgia for
the days of Porfirio Díaz, and irritation with Mexico's economic na-
tionalism, embodied in a series of agrarian and oil industry–related
legislation.

While Washington debated the possibility of intervening militar-
ily, Great Britain was moving in a different direction. In December
1925, London took an important step toward normalizing diplomatic
relations with Mexico by naming Esmond Ovey as its first plenipo-
tentiary minister. Ovey offered a fresh view of the Revolution, laying
the conceptual foundations for an understanding between Mexico
and the United States; his dispatches to the Foreign Office amounted
to a reinterpretation of the Revolution. Ovey felt that the dictatorship
of Porfirio Díaz had inherent structural weaknesses that made the
Revolution inevitable. He also pointed out that the Revolution was
now in a process of consolidation and that its leadership (the Sonora
dynasty) was not as radical as it first appeared. The British ambassa-
dor called on his countrymen and others to respect the new Mexican
leadership, which, though perhaps less refined than the government
of Porfirio Díaz, was nonetheless prepared to reach agreements with
foreign powers. To sum up, he recommended that Mexico be readmit-
ted to the community of nations.4

These ideas gathered momentum in Washington, fostered by sec-
tors of U.S. society that did not want war with Mexico, and by a re-
evaluation of Mexico's importance in a broader context. Following the
Revolution, the United States had been forced to deploy half of its
armed forces along the U.S.–Mexico border, just as the nation was
mustering for World War I (Dziedzic 1996: 67). U.S. strategists' fears

4See, especially, Ovey to Chamberlain, January 25, 1926, and Ovey to Chamberlain,
of instability in Mexico would play a pivotal role in their security considerations from this point on. We should bear in mind that history has accustomed the United States to an extremely broad security margin, and even potential threats provoke heightened reactions.

As the situation evolved, Washington adopted a new stance. Sheffied was retired in 1927 and replaced by Dwight Morrow, instructed by President Calvin Coolidge to "keep the United States out of a war with Mexico" (Melzer 1987: 6). Coolidge defined his new policy as "a firm commitment with our rights, and scrupulous respect for Mexican sovereignty ... accompanied by patience and tolerance" (Rippy 1931: 377). Ovey's position had been adopted by the United States, providing a clear example of how changing perceptions can produce political effects.

A CONGENIAL AMBASSADOR

Dwight Morrow's years as ambassador to Mexico would prove crucial for the history of relations between the two nations—and for the longevity of Mexican authoritarianism. When he arrived in Mexico City by train in October 1927, he received a welcome "the likes of which had never been provided for any diplomat in Mexican history" (Melzer 1987: 1).5 Two days later, Morrow had already begun to establish direct communication with Mexico's most important functionaries. Although Morrow never learned to speak Spanish—and persisted in addressing ladies (señoras) as "Sonoras," to the amusement of the revolutionary generals—he became a specialist on Mexico. To foster goodwill, he agreed to replace the name "American Embassy" with "Embassy of the United States" and arranged for Charles Lindbergh to fly the Spirit of St. Louis nonstop from Washington to Mexico.

There were less congenial sides to Morrow, such as his indifference toward violations of Mexicans' rights. Soon after his arrival in Mexico, the government summarily executed Jesuit priest Miguel Agustín Pro Juárez and three others accused of conspiring against Álvaro Obregón (no evidence was produced to substantiate the charges and no trial was held). Although this was in flagrant violation of Mexican law, Morrow nonetheless agreed to accompany Calles in his subsequent travels through northern Mexico, claiming that the executions were a "domestic matter" and that offending Calles would undermine his hopes of having an impact in Mexico.

Lorenzo Meyer has suggested that Morrow's achievements were "spectacular." Moreover, the manner in which Morrow handled the

5In Mexico's political culture, the government has traditionally used rapturous multitudes as an instrument to earn the goodwill of visiting U.S. or other foreign dignitaries.
ongoing dispute surrounding foreign-owned oil companies in Mexico set a pattern, foreshadowed in the Bucareli Agreements, a pattern that still prevails. Calles made important concessions to the oil companies, all the while preserving his regime's nationalistic image. At Morrow's suggestion, Calles ordered the "Mexican Supreme Court to declare the nationalistic oil legislation which threatened foreign investments as anticonstitutional; the new legislation [approved by Congress] reflected the efforts of Morrow and the Minister of Trade, Commerce, and Labor" (L. Meyer 1985: 31; see also L. Meyer 1972: 266–81). These and other agreements were made possible through the conservative pragmatism of Mexico's ruling elite (James 1963: chap. 10).

This arrangement constituted a guarantee of mutual support between the elites of the two countries that has not wavered since its inception. When president-elect Álvaro Obregón was assassinated in July 1928, Morrow did everything he could to support Calles. He was present, for example, at the famous State of the Nation Address in which Calles said that the days of the caudillos had come to an end and an era of institutions had begun; Morrow was the first to applaud the Mexican president, a gesture charged with symbolism. When a rebellion headed by General Gonzalo Escobar broke out in March 1929, the United States implemented a rigorous arms embargo and froze the rebels' U.S. bank accounts. The government, in contrast, received ammunition and technical assistance (Lindbergh was an advisor) and the backing of a series of warships along the Mexican coastline, which clearly denoted who Washington's favorites really were. In the November 1929 presidential election, Morrow backed Pascual Ortiz Rubio, who used both official resources and violence to defeat José Vasconcelos in the first electoral fraud of the postrevolutionary era.

When Morrow left Mexico in 1930, President Ortiz Rubio stated that relations between the two nations had reached a "peak of cordiality" (in Rippy 1931: 381). During the 1950s another Mexican president, Emilio Portes Gil, wrote that a "neighborly policy had been set in place by a great ambassador, a Republican, in fact, señor Morrow. He was able to dissolve away the grave conflicts that threatened to plunge our nations into war" (Portes Gil 1954).

PIECES OF THE UNDERSTANDING

The level of understanding between Dwight Morrow and Plutarco Elías Calles set a precedent that has governed the relationship ever since. To summarize, the U.S. ambassador, in an informal, personal, discreet, and effective conversation with the president of Mexico, suggested a practical procedure for resolving the dispute over the
vital issue of Mexico's oil industry. The Mexican president, who needed an agreement with Washington, quietly accepted Morrow's proposal for instructing the Supreme Court to declare any conflicting laws unconstitutional. His action simultaneously demonstrated the vigor of Mexican presidentialism, the malleable nature of nationalism, the lack of respect for Mexico's legal system, and the increasingly conservative character of the Calles regime.

As a result of this diplomatic maneuvering, U.S. oil companies were able to retain much of their privileged status, and the Mexican government earned Washington's support in preserving the Calles regime's nationalistic image. On March 28, 1928, the U.S. State Department declared that "the measures voluntarily implemented by the Mexican Government will, it seems, bring discussions which began ten years ago to a practical conclusion" (in Rippy 1931: 379, emphasis added). Washington also aided the Mexican government by ignoring human rights violations and by funneling economic, military, and political assistance to the regime as needed. The Mexican government's tight hold on the domestic media served to bolster further its efforts to maintain a nationalistic image.

In sum, this arrangement between politicians accustomed to exercising power gradually evolved into a flexible and adaptable framework, capable of ensuring continued benefits for the elites of both nations. Regarding the motivations of Plutarco Elías Calles and his group of revolutionaries, it appears that the margins for action afforded by this informal understanding provided the space for a series of Mexican governments to conduct experiments in economic development and social politics, while simultaneously pursuing a progressive and independent foreign policy. In this sense, the arrangement was a positive outcome, made inevitable by the asymmetry of power between the two countries. It follows, then, that bilateral relations have been driven by a dose of authentic nationalism tempered by a desire to maintain personal power and privilege.

If we accept that this is a case of well-intentioned pragmatism, we must also admit that the Mexican government in fact manipulated both its nationalistic image and its relationship with the United States in order to enhance its control over the population. It promoted an incomplete and distorted view of reality in which the United States' malevolent intentions justified the regime's demands for unity and obedience on the part of the Mexican people. Contact with the United States was allowed only through official channels, thus imposing a sort of double seal: Mexicans rarely traveled to foreign countries to discuss what was happening in Mexico, and the international community turned its back on Mexican affairs. This level of manipulation, which obscured the complex and ambiguous nature of the true rela-
tionship, was possible only because of the Mexican population’s almost total ignorance of U.S. affairs.

The U.S. elite also found the understanding to their advantage. Their economic interests had been respected, stability along their nation’s southern flank was guaranteed, and, in crisis situations, they felt assured of Mexican support. Some arrangement of this nature was essential, because geographic contiguity limits viable options for action (for example, an extensive intervention can have negative repercussions upon a nation’s own territory). Mexico’s isolation from the rest of the world posed no problems for the United States, a nation uninterested in any intimacy with its southern neighbor.

The bilateral understanding was tested a number of times between 1927 and 1946. The expropriation of the oil industry and collaboration during World War II are the two clearest examples. In 1938, General Lázaro Cárdenas finally curtailed the high-handed international oil-companies by nationalizing the oil industry. Remarkably, U.S. Ambassador to Mexico Josephus Daniels and Washington, sensitized by the international context, responded by working to maintain the cordial relationship with Mexico, against the backdrop of veiled U.S. preparations for war in Europe.

This response confirms that, although the oil industry expropriation was a high point for Mexican nationalism, Lázaro Cárdenas was very careful not to overstep the unwritten rules established by U.S. interests. For example, he never attempted to nationalize the second great enclave of foreign investment: the mining industry. He also took advantage of every opportunity to show support for the Morrow doctrine. The choice of moderate Manuel Ávila Camacho as his successor is perhaps the clearest evidence of Cárdenas’s pragmatism.

The U.S. strategists’ decision to be flexible proved to be sound: during World War II, Mexico cooperated with the United States by surveilling foreigners potentially hostile to the Allies; providing workers through the bracero agreements; creating the Joint Mexican-U.S. Defense Commission (JMUSDC); increasing exports of raw materials; and declaring war against the Axis powers—giving Washington clear evidence of Mexico’s trustworthiness as a neighbor (Vázquez and Meyer 1982: chaps. 7–8).

Following chapters explore the development of this extraordinarily solid understanding, based since the end of the war on a commitment of mutual support established around shared interests. Although this understanding is not formalized in treaties or complex

*A number of academic texts and documents confirm the importance of Mexico’s stability for U.S. security. See WD 1942; SDN 1945; JIS 1946; CIA 1951; DOS 1951. The pivotal nature of this link is reiterated in more recent texts: see Deagle 1981; Linn 1984; Moorer and Fauriol 1984; H. Douglas 1985; Sanders 1987. Neuchterlein (1985) provides the most systematic overview.
protocols,² it has nonetheless become an indispensable tool for the discreet resolution of differences.

The understanding has undergone a gradual process of modification. Mexico’s isolation began to give way to economic imperatives and increasing contact between political parties, intellectuals, and nongovernmental organizations in the two countries. Although Washington was never truly satisfied with the Mexican experiment and would have preferred a neighbor who embraced capitalism, installed a liberal regime, and became a close ally in the international system, patience prevailed—until Mexico’s accelerating economic deterioration in the 1980s finally allowed Washington to force an overhaul of that country’s economic model. The political system, however, was only slightly transformed, partly because the U.S. elite, obsessed with stability, decided to persevere in its support for the ruling Institutional Revolutionary Party (PRI).

These transformations blurred the goals and the essence of Mexican nationalism. What had once been a mechanism to extend the margins for development and foreign policy now became a shield, isolating and safeguarding the Mexican president and his power group. Following chapters will show how this blurring led to a new, transitional phase, still in progress, both for nationalism and for the United States’ role in Mexico’s national history.

²There are a number of formal agreements between Mexico and the United States, governing a variety of issues. However, they were inspired by the informal “Morrow Doctrine.”