Historical Milestones and Turning Points: The Construction of U.S.-Mexico Relations in the Nineteenth Century

Hitos históricos y puntos de giro. La construcción de las relaciones México-Estados Unidos en el siglo XIX

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Abstract:
The authors of this article focused on a series of events that were decisive for the construction of the U.S.-Mexico relationship in the 19th century. The article is divided into two parts, corresponding to clearly differentiated cycles in the bilateral relationship. The first is characterized by the dispute over territory, which represented a legacy of colonial empires and southern expansionism by slave-owners. The latter emerged as a result of the wars of the 1860s in the two countries, which saw the relationship reoriented towards cooperation, against a backdrop of economic, social and cultural processes; conflict did not disappear but was processed through diplomacy.

Resumen:
Los autores de este artículo interpretativo seleccionaron una serie de eventos determinantes para la construcción de la vecindad México-Estados Unidos en el siglo XIX. El artículo se divide en dos partes, que corresponden a ciclos claramente diferenciados en la relación bilateral. El primero se caracteriza por la disputa por el territorio, el cual representaba un legado de los imperios coloniales y el expansionismo esclavista sureño. El segundo, abierto por las guerras de la década de 1860 en los dos países, el vínculo se orienta a la cooperación, en un conjunto más amplio de procesos económicos, sociales y culturales; el conflicto no desaparece: se procesa a través de la diplomacia.

Key Words:
Territorial dispute, Texas, War of 1847, Treaty of Guadalupe Hidalgo, cooperation, Civil War, French Intervention, railroad connection.

Palabras clave:
Disputa territorial, Texas, Guerra de 1847, Tratado de Guadalupe Hidalgo, cooperación, Guerra de Secesión, Intervención francesa, vinculación ferroviaria.

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The asymmetry of power and resources has been the hallmark of the relations between Mexico and the United States throughout their history. Within this framework, a very broad, articulated and intense experience of neighborliness has been constructed, transcending geographical coordinates and rooted in an intertwined series of historical processes. Although an exhaustive reconstruction is not possible here, in this interpretative article we have selected a series of events that were decisive to the construction of neighborliness in the nineteenth century.[1] Our approach is to identify the logic and significance of these events in terms of the political response to this asymmetrical relationship. From this perspective, we will then situate the contexts that framed them, the actors that led them and the forces that drove them, identifying the principal implications and how these reconfigured the dimensions of neighborliness over time.

With the above objective in mind, this article is structured in two parts, each corresponding to clearly differentiated cycles in the bilateral relationship. The first is characterized by the dispute over the control and appropriation of the territory, which represented a legacy of colonial empires and a tendency marked by the expansionism of the Southern slaveholding states. The second, set into motion by the wars of the 1860s in the

[1] Our bibliography includes only a few basic references. "U.S." and "American" are used interchangeably.

two countries, marked a new direction in relations, in which territorial expansion was set aside, opening a space for cooperation within a broader set of economic, social and cultural processes. This does not mean that conflict disappeared, merely that it was not a permanent state and was handled through diplomacy.

The cycle of territorial dispute and the modification of borders, 1823-1860

The beginning of diplomatic relations

Official relations got off to a rocky start. From the beginning, the issues that would predominate in the decades that followed—territory, borders and the impact of other international actors—were evident.

Although the disparity of power and economic resources was not as pronounced as it would be later, differences in the volume of population and political stability of each country presaged the growing divide. When Mexico gained independence, the United States had the advantage of having already experienced forty years of independent life. Clearly, it was not the powerful nation it would later become: unable to confront the European powers of the time, it had concerns about its security, a sentiment reflected in the defensive nature of the message by President James Monroe.

The beginning of relations was marked by the impact of the international context and the legacy of disputes among the European empires and with Native American nations. Such confrontations left the nascent countries with the boundary issues they had inherited. The unresolved border between Mexico and the United States and American claim to Texas originating in the Louisiana Purchase resulted in clashes between the neighboring States.

Although the U.S. Congress was sympathetic early on with Spanish American independence, the suspicion of European hostilities, its own conflicts with the British and the lack of definition of the border with Spain, inclined it to declare neutrality at first. The establishment of the liberal regime in Spain led Washington to reconsider its position and, in March 1821, Monroe declared that Mexico and other Spanish American countries had the right to be recognized. The Mexican Empire, urgently in need of international

ratification, appointed the envoy José Manuel Zozaya, who was received by Monroe in December 1822 in keeping with protocol, marking the formal initiation of relations. It was a singular beginning, because Washington, rather than sending a minister, sent a special representative, Joel R. Poinsett, to report on the situation in Mexico and propose the establishment of a new boundary to Emperor Agustin Iturbide. When this was refused, Poinsett returned to his country. Two years later, he returned to Mexico as Minister Plenipotentiary (1825-1829) with instructions to negotiate a commercial treaty, which he was unable to finalize, and to insist upon changing the boundary, which he did repeatedly without success.

The separation of Texas

The process that led to the separation of Texas and its independence was the result of four intersecting concepts: the depopulation of northern Mexico, U.S. expansion, land speculation and European interference.

Independent Mexico had inherited the low population density in the "far north" from Spain. The Viceregal government gave land in Texas to the inhabitants of the territories ceded to France and the United States with the Treaties of San Ildefonso (1800) and Adams-Onis (1819). In this way Moses Austin was awarded the first land grant, which he left to his son Stephen. A risky experiment was started that gave land to Americans, free of taxes, to settle hundreds of families. Faced with numerous frustrated colonization projects, Mexican governments believed that settlement would ensure the defense of the territory against the threat of hostile Indigenous people and foreign powers.

Mexico's lack of control over Texas was soon apparent. The scarce presence of criollos or mestizos in the region contrasted with the avalanche of American settlers who entered the province with slaves, taking advantage of Mexico's confusing provisions on slavery. In addition, disorganization and lack of civil, military and fiscal authorities resulted in many emigrants living outside Mexican laws. These settlers' ties and trade were with Americans, not with Mexican residents.

The land concessions generated a lucrative business: property obtained from Mexico was resold with attractive profits. The transactions attracted businessmen, politicians, low-level officials and military from both countries:

Andrew Jackson, Samuel Houston, Poinsett, Lorenzo de Zavala and Vicente Filisola, among others. "Speculation fever" also caused frictions between the central and state governments over control of the properties, contributing to the dissatisfaction of many settlers.

In 1829, after learning of conditions in Texas, Mexican authorities attempted to regain dominance in the region. Assuming control over the land concessions, prohibiting the entry of U.S. settlers, and establishing customs houses, the Government provoked the discontent of settlers who began to organize to revert the situation. Neither Austin's attempt to reach an agreement with the Mexican government, nor the repeal of the most drastic measures could prevent the rebellion, which used the shift to the centralist form of Government as justification. Washington remained neutral but allowed adjacent and neighboring state governments to support the fight by recruiting volunteers and providing money and arms.

Santa Anna's attempt to quell the insurrection failed, resulting in the independence of Texas, declared on March 2, 1836. The Mexicans, stubbornly refusing to recognize this turn of events, attempted to retake Texas. The paucity of funds, in particular, and the collaboration of the United States with the Texans, prevented it.

Great Britain's efforts to get Mexico to recognize its former province only provoked the U.S. suspicion that they were "meddling in American affairs." Under such conditions, Texas as an independent republic maintained an unstable balance whose repercussions would lead to the confrontation between Mexico and the United States.

The war of 1847

The decade between Texan independence and the Mexican-American War was characterized by accumulating tensions due to hostilities on the border, Texas' aspiration to extend its boundary to the Rio Grande (known as the Rio Bravo in Mexico), the Mexican attempt to recover the province, and the complex process of the incorporation of Texas into the United States. During that period, British diplomats attempted to convince Mexico to recognize the new republic to strengthen it and curtail U.S. expansion, whose next step, it feared, would be California. These efforts fueled both Santa Anna's obsession with reconquering Texas

and the intense nationalism and mistrust of Europe by the United States under the influence of the Monroe Doctrine.

Texas's application to join the American Union rekindled the debate on slavery and its extension to new territories, strained regional differences and complicated its incorporation. The annexation agreement was finally approved in February 1845. In response, Mexican Minister Juan Nepomuceno Almonte closed the legation, following instructions indicating that annexation was a cause for war.

Under these circumstances, Mexico oscillated between pessimism and uncertainty. On the one hand, the military, the press and opponents of the moderate faction promoted a bellicose sentiment. On the other hand, the Government was paralyzed, aware of the lack of resources to go to war. There was hope that, due to conflicts over the Oregon territory, the Americans would line up their forces against Great Britain; some harbored the unwarranted expectation of support from a European power.

President James Polk implemented a twofold strategy: negotiate—by sending John Slidell to Mexico—and prepare for war. Growing Mexican hostility toward the Americans and the bellicose climate made an amicable settlement difficult. Slidell, with instructions to acquire territory, was not even received by President José Joaquín Herrera, who was overthrown shortly thereafter; his successor, Mariano Paredes Arrillaga, also refused to see him. The snub infuriated Polk and opened the way to violent expansionism, negating the possibility of an agreement. British interference in the matter of Texas was used by the president to invoke Monroe's message and legitimize his ambitions for annexation. In his message to Congress (December 1845), he informed them of the rupture with Mexico and announced that he had stationed a force on the border and a squadron in the Gulf of Mexico, preparing for Mexican aggression or declaration of war. The incident used to justify the war occurred on April 25 and allowed Polk to portray Mexico as the aggressor.

On May 13, 1846, the U.S. Congress declared war. The countries' armed forces would battle for over twenty months. The Mexican army was composed of some 23 000 poorly armed men with little military training; their cavalry and artillery reflected a lack of resources. The U.S. army had 45 000 elements, two-thirds of them volunteers; all well-armed and equipped. The United States implemented three campaigns. California,

a prime target of the war, was subjected to expeditions by land and by sea. In the first case, troops were sent to New Mexico, from where contingents headed to Chihuahua and Los Angeles following the capture of Santa Fe; in the second, they took San Francisco and descended to Mazatlán. General Zachary Taylor, at the head of the third operation, left Corpus Christi for Monterrey and Saltillo and defeated the Mexicans in three battles. By February 1847, northern Mexico had fallen, and U.S. squadrons had blockaded the ports of the Gulf of Mexico.

Internal Mexican conflicts did not cease during the war and the incursions of native nomads added to the political convulsions. Federalism had been restored and Santa Anna returned; the persistent financial shortfalls that hindered the organization of the campaign led the Government to seize ecclesiastical property in August 1846. This provoked the uprising of the moderates, sponsored by the Church, and the annulment of the measure. In those days, February 1847, the Battle or Buena Vista Angostura was being waged.

When General Winfield Scott took Veracruz, Polk thought the Mexicans would make peace immediately. This not being the case, Scott received instructions to take Mexico City. Along the way, he defeated Santa Anna at Cerro Gordo and reached the Valley of Mexico. Following a series of victories, he entered the capital, where, on September 14, 1847, the stars and stripes were hoisted above the National Palace. The defeated government took refuge in Querétaro.

The independence of Texas and the war between Mexico and the United States have common denominators: the weak demographic presence and the expansionist drive. Northern Mexico had not been populated by its nationals and incursions by native nomads had debilitated it since the 1830s, in contrast with the Euro-American "avalanche of settlers" advancing inexorably toward the Southwest.

The fates of the Texan Revolution and the 1847 War were sealed by the impact of other actors in addition to the protagonists, as well as by the U.S. perception exaggerating the British ambition to intervene in Mexico. The difference lies in the fact that in the Mexican-American War there was no direct European interference as in the Texas experience; but expansionists used Texas and the specter of British ambitions in California all the same to persuade public opinion of the necessity of war with Mexico.

Fighting was marked by asymmetry, both in terms of military capabilities and the resources to finance the conflict. Moreover, while U.S. nationalism mobilized not only Washington but thousands of volunteers, in Mexico disputes between radical liberals and moderates, as well as some entities' interpretation of the federal pact, weakened the resistance. That said, fissures could be observed in both countries: neither had a consolidated Nation-State, as was evident after the war.

The Treaty of Guadalupe Hidalgo

The Mexican peace proposal, delivered before the fall of the capital, solely consisted of ceding the territory north of the 37th parallel in exchange for compensation. That infuriated Polk, who ordered the recall of peace envoy Nicholas P. Trist. The news of the capture of Mexico City emboldened the ultra-expansionists, who called for the annexation of the entire country; Polk himself wanted to set the boundary on the 26th parallel. However, the regional polarization that would trigger the annexation of vaster territories and the revival of the dispute over slavery contained the ambitions for conquest.

Trist, unaware of the mandate to return to his country, continued talks to end the war. When he finally received the order, he decided to ignore it, believing that his Government was unaware of the local situation; he sensed the will for peace in Mexico, knew of Congress' willingness to negotiate, and detected a unique opportunity that would be lost if the radicals took power. The envoy adhered to the instruction to set the border on the Rio Grande along the 32nd parallel, since Alta California and New Mexico were *sine qua non* conditions for the agreement, and offered the lowest compensation suggested by his Government: 15 million dollars. The Mexican envoys, through a skillful negotiation, retained Baja California and the territory that joins it to the continent without conceding the right of transit through Tehuantepec. They obtained the U.S. commitment to handle the claims of its citizens, to secure the rights of the Mexicans who remained in the ceded territory and, in Article XI, to prevent incursions by native nomads. The Treaty of Guadalupe Hidalgo, which brought the war to an end, was signed on February 2, 1848, and was approved in the U.S. Senate by a slim majority.

The vast territories acquired intensified the North-South dispute, which prevented the ultra-annexationists from defining the stipulated boundary. However, many issues remained unresolved, opening up opportunities for expansionist pressure.

The Gadsden Purchase

Victory in the war placed the United States fully in the Pacific, broadened its trade prospects, and allowed it to compete with Europe for hemispheric markets and maritime routes. The urgency of connecting to the acquired areas led it to seek the concession for an interoceanic connection; the land needed for the construction of a Southern railroad to the Pacific and the subsequent expansion over Mexican border entities.

In this context, Southerners dissatisfied with the established boundary sought to expand it through a new agreement, taking advantage of the errors in the map used in the negotiations and the discrepancies this raised. This was reinforced by the intervention of U.S. businessmen who, in partnership with Mexicans, aspired to control a passage through the Isthmus of Tehuantepec and a deep Southern railway route.

The issues left unresolved by the peace treaty generated serious conflicts in a border region dominated by insecurity, aspirations for annexation and the separatist plans of some Mexicans. In the United States, tensions between regional factions had been exacerbated since the annexation of Mexican territory, progressively reducing the margins of coexistence. Matters of domestic or foreign policy and even the relationship with Mexico were decided in this climate.

It was within this context that the Gadsden Purchase, or Treaty of La Mesilla, signed in 1853 and ratified in 1854 during the presidency of Franklin Pierce, was negotiated. Washington wanted to repeal Article XI of the Treaty of Guadalupe Hidalgo, which required them to contain Indigenous raids into Mexico; obtain a broad territorial concession, and passage through Tehuantepec. Following debates and the interference of speculators in the negotiations, the government of Santa Anna signed the treaty repealing the Article XI, ratifying the right of transit through Tehuantepec and granting a territorial corridor for the Southern route to the Pacific in exchange for 10 million dollars. When the treaty was discussed in the U.S. Congress,

North-South rivalries again constrained the scope of annexation. Although the expansionist spirit was in full swing, the annexed territory was less than that ceded by Mexico. It was the last modification of the border in the nineteenth century with which the cycle of expansion of the United States at the expense of Mexico came to an end.

The cycle of cooperation: from the wars of the 1860s to the end of the century

The wars against Secession and against Empire

In early 1861, both countries confronted profound changes destined to precipitate bloody confrontations, caused, in both cases, by the clash between opposing models of State. On the one hand, involving the role of the Church and the Constitution in Mexico; and on the other between slavery and the primacy of the federal government over the states in the United States.

By the time Abraham Lincoln assumed the presidency in March 1861, most of the Southern states had seceded from the Union. This led him to redefine his policy towards Mexico. U.S. Minister Thomas Corwin received instructions to express their willingness for a relationship with "no ambitions," in contrast to the expansionism of the Southern slaveholding states. He was also instructed to obstruct Confederate influence and prevent Mexico from recognizing the separatists. Juárez, in turn, saw the alliance with the North not only as a defense against a possible Confederate threat, but as reinforcement against the conservatives and protection from the tripartite intervention looming over the country.

Washington's repudiation of annexation was not absolute. When the secessionists threatened to invade Mexico and when the European tripartite expedition was announced, Washington expressed interest in acquiring Baja California, Sonora and Chihuahua to prevent the South from expanding and attacking from the rear.

At another point, when European intervention was imminent, the U.S. government proposed offering loans to Mexico to resume the payment of the foreign debt and thus remove the British from the theater of the

conflict, reaffirming the Monroe Doctrine. Relations between the Union and Mexico were thus shaped by international and domestic factors: the Lincoln administration disapproved of the European offensive in Mexico, but, unable to stop it, feared the formation of a coalition between the British or French and the Confederacy.

With the arrival of the European battalions in Veracruz, the Union lost interest in a treaty with Juárez. When the French political intentions became apparent following the withdrawal of the Spanish and British, the Civil War was raging, and its outcome was uncertain. This juncture, which allowed the Napoleonic government to sponsor the monarchist project in Mexico, determined the priority of the Union: to prevent an alliance between France and the Confederates. This led Lincoln to declare neutrality and demand that this be reciprocated by the French in the North-South conflict. Thus, the Monroe Doctrine was suspended, although Washington always refused to recognize Maximilian and maintained relations with the Juárez government represented by Matías Romero.

The end of the Civil War marked a significant change in U.S. policy toward Mexico. With the ascension of Andrew Johnson to the presidency following the assassination of Lincoln, there was growing annoyance with the French presence. At the same time, General Ulysses S. Grant's strong sympathies for the Mexican Republican cause came to the fore. Thanks to Matías Romero, Grant and his allies came to understand the conflicts in North America from a global perspective: the struggle against the Franco-Mexican Empire as the extension of that against the slaveholding South.

This convergence was reflected in a series of military measures, as well as in the formulation of projects, unsuccessful, for the use of U.S. forces in Mexico. It was highlighted by the concentration of 40 000 troops on the border in mid-1865, which was a warning for the French contingents and at the same time a protective shield for the Republican Government in Chihuahua. This was clearly perceived by both the French commanders and Juárez.

In late 1865, Secretary of State William H. Seward intensified pressure on France to commit to the withdrawal of its troops. He ordered the U.S. minister in Paris to inform Napoleon III that the Franco-American friendship would be "in imminent danger" should his contingents not withdraw. The explicit and vigorous warning caused alarm in Paris, paving the way for an agreement on deadlines for their departure. Once

this was accomplished, Seward prevented the arrival of Austrian reinforcements to fill the vacancy left by the French. Juárez perceived the scope of Seward's diplomatic offensive with great clarity, as his unofficial communications reveal. From that point forward, the political and military destiny of the Empire was decided, as was the fate of Maximiliano, executed in Querétaro in 1867.

Together, these two wars had a profound impact on the bilateral relationship. The Civil War decimated the Southern expansionist project and nearly extinguished ambitions for annexation in U.S. politics, creating a platform that favored neighborliness and the intensification of relations. At the same time, the defeat of the French and the execution of a European prince were definitive in the strengthening of Mexican independence and its practical contribution to the defense of the Monroe Doctrine.

The diplomatic and security crises, 1877-1880

In the late 1870s, the bilateral relationship came to a conflictive and difficult crossroads caused by the intersection of diplomatic and security crises, in which a military outcome was feared. The diplomatic crisis was due to the U.S. refusal to recognize the Porfirio Díaz administration, a decision far from customary in such matters and more of a reflection of domestic politics following the controversial elections of 1876. The crisis in security, in turn, was the result of President Rutherford B. Hayes' executive order of June 1877, authorizing the army to cross the border in pursuit of hostile elements. This extraterritorial instruction represented a unilateral response to the lack of control in the borderlands, where the frequency of cattle rustling, banditry and Indigenous incursions was a source of tension on both sides.

In Mexico, however, these measures were perceived as the resurgence of a threat of annexation or an attempt to establish a protectorate. The Díaz government protested the "flagrant violation of the sovereignty of the Republic," ordering the army to repel any U.S. incursion. Simultaneously, however, he took on the problem of border security, deploying more troops and instructing commanders to engage in local diplomacy with their U.S. counterparts.

In addition, a lobbying and public relations campaign relations to influence public opinion against Hayes' policy was launched in the United States

highlighting the economic opportunities in Mexico and the advantages of strengthening bilateral relations. Manuel de Zamacona, confidential envoy and later minister, and Matías Romero, Secretary of Finance, were its architects and principal executors. This brought about a successful information campaign about Mexico and helped clear the bilateral agenda of the security risk, paving the way for the intensification of relations.

Recognition was obtained in April 1878 and the military order was revoked in February 1880 during the visit of former President Grant to Mexico, an event that the Díaz administration used politically to promote large-scale celebrations of the Mexican-U.S. friendship.

In this way, the crisis laid the groundwork for a new neighborly regime between the two countries based on cooperation. Significantly, in July 1882, the two governments signed a set of agreements of great symbolic value, most notably including one agreeing to the reciprocal passage of troops to allow for the persecution of crimes within a cross-border radius. This agreement ensured the marginalization of aggressive or unilateral purposes and was an effective instrument in stabilizing border conditions. It was renewed several times until 1896.

The railway connection and its consequences for the relationship

In the late 1870s, the U.S. railway network had reached different points along the border, and the possibility of extending construction to Mexico was proposed. The advantages of modernization and economic growth, as well as the vision of the railroad as a unifier of the country, overcame Mexican distrust. Thus, between 1880 and 1883, government concessions were granted for the construction of several lines that departed from the border: two trunk lines to Mexico City and two regional ones.

The railway connection between the two countries played a central role in modifying the material bases of the relationship. It lowered freight costs and drastically reduced understandings of geographical distance, providing a new dimension to neighborliness. It also had profound implications for the political development of economic relations, in two directions. The first consisted of the inclusion of what was known as the Calvo Clause, named after the Argentine jurist, in all railway concessions. This

legal mechanism required foreign companies to submit to the Mexican judicial system and stipulated that they waive diplomatic protection. In this regard, the Mexican Government's resolve overcame the resistance of U.S. diplomacy.

The other aspect was the regulation of the border based on the connection between the two railway networks. In Mexico, strict surveillance rules were initially implemented that complicated the movement of trains. For a few years, load inspection procedures and the restricted schedule for crossing the border caused major delays in shipments and held up railcars. This problem was progressively regularized thanks to a series of liberalizing measures, the provision of customs employees and greater efficiency in procedures, which consolidated the customs system.

Overall, this helped balance integration with an economy as thriving as that of the United States without renouncing the political autonomy of the Mexican State.

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