



Mexico and the Caribbean

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This essay is drawn from four lectures that I presented on expeditions in Mexico and the Caribbean during the past two decades. In each talk, I deal with political, economic, and cultural dimensions of Latin American history.

I begin with Mexico (written in 2001). I first discuss the settlement of Mexico by Amerindian civilizations, the rise and fall of Amerindian empires (Teotihuacán, Zapotec, Mayan, Toltec, and Aztec), the Spanish conquest, Spanish colonization, and Mexican independence. Then I explain Mexico's loss to the United States of Texas, New Mexico, and California, Mexican development under Porfirio Diaz, the Mexican Revolution (1911-1920), post-revolutionary Mexico, and modern Mexico since 1946. I next compare Portuguese colonization in Brazil with Spanish colonization in Mexico, Peru, and Argentina (written in 2007), contrasting Portugal's and Spain's conquests, colonial export cycles, and loss of control in the early 19th century. I wind up with a comparison of British, French and Dutch colonization and development in the Eastern Caribbean region in the past three centuries

(written in 2007). I append a time line, a bibliography, and a description of sites that I visited in the Caribbean region.

Amerindian and Spanish Mexico (1200 BCE-1821)

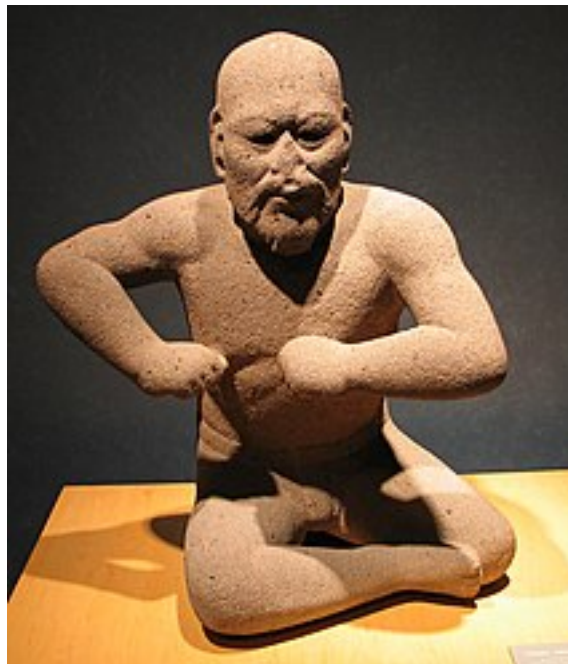
Early Native American Inhabitants of Mexico. About 7000 BCE humans in the area of what is now Mexico began experimenting with agriculture, and they developed a reliable system of food production, based on maize, beans, and squash, by about 2500 BCE. Their agriculture could sustain permanent settlements and thus promoted the emergence of organized religion, art, and trade.



Source: Wikimedia Commons available at
<<https://commons.wikimedia.org/wiki/File:Maize-teosinte.jpg>>

Maize (Bottom Image), Mexico's Staple Food – Domesticated in Mexico from Teosinte Plant (Top), (Middle Image is a Maize-teosinte Hybrid)

The first urban, literate society were the Olmecs, whose many achievements include a hieroglyphic system of writing, a calendar, fine jade sculptures, and pyramids such as La Venta. The Olmecs eventually went into decline around 200 BCE, largely as a result of increased pressure from rival civilizations that would dominate the Classic Period.



Source: Wikimedia Commons available at
<[https://commons.wikimedia.org/wiki/File:20041229-Luchador_Olmeca_\(Museo_Nacional_de_Antropolog%C3%ADa\)_MQ.jpg](https://commons.wikimedia.org/wiki/File:20041229-Luchador_Olmeca_(Museo_Nacional_de_Antropolog%C3%ADa)_MQ.jpg)>

*Olmec Civilization in Mexico Arose 1200 BCE, Peaked 700-400 BCE,
Declined 200 BCE – The Wrestler, 1200-400 BCE,
Basalt, Arroyo Sonso Area, Veracruz, Mexico*

Classic Amerindian Mexico (400 BCE-900 CE). The Classic Period was ushered in by the rise of Teotihuacán, a vast urban complex

of at least twelve square miles with a population of about 250,000 people. The Teotihuacanos commanded an empire that reached from northern Mexico into Guatemala, but eventually succumbed to barbarians invading from the north and declined as of about 650 CE.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Panoramic_view_of_Teotihuacan.jpg>

*Teotihuacán Empire (400 BCE-650 CE) –
Panoramic View of Teotihuacán from Top of the Pyramid of the Moon,
Pyramid of the Sun Is in the Far Left*

The most powerful force following Teotihuacán were the Zapotecs, centered around Monte Albán. However, around 900 CE Monte Albán was abandoned for no known reasons.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Monte_Albán_West_Side_Platform.jpg>

*Monte Albán, Capital of Zapotec Empire (600 BCE-900 CE) –
West Side Platform of the Pyramid Complex*

The third great Classic civilization were the Maya, whose most successful period lasted from about 600 to 900 CE. Centered around Petén in Guatemala, their range extended into the Mexican states of Chiapas, Tabasco, Campeche, and Yucatan. The Mayans occupied various large urban centers, the greatest of which was Tikal at Petén, including six great pyramids, ten reservoirs, artificial lakes, and a multitude of other structures. The causes of Mayan decline remain unclear and probably include a combination of natural disasters, pressure from invaders, and internal societal tensions.



Source: Wikimedia Commons available at
<<https://commons.wikimedia.org/wiki/File:Tikal-Plaza-And-North-Acropolis.jpg>>

*Tikal National Park (Guatemala),
UNESCO World Heritage Site, Mayan City of 100,000 –
Temple I on the Great Plaza and the North Acropolis, Tikal*

Post-Classic Mexico (900-1521). Following the decline of Teotihuacán, waves of primitive, warlike peoples known as Chichimecs (“People of Dog Lineage”) descended into Mexico from the north. One group of Chichimecs called the Toltecs established an empire based from Tula, which became the most powerful city between the reigns of Teotihuacán and Tenochtitlán. The Toltec culture set the precedents of aggressive subjugation of their neighbors and extensive rituals involving human sacrifice that would later figure prominently in Aztec society.

Drought, war, and famine precipitated the decline of the Toltecs in the middle of the 12th century.



Source: Wikimedia Commons available at
<<https://commons.wikimedia.org/wiki/File:TulaSite81.JPG>>

*Tula, Capital of the Toltec Empire (10th mid-12th centuries) –
Columns on Pyramid B in the Form of Toltec Warriors*

In 987, the Toltec leader was overthrown and exiled to Yucatan where he occasioned a shift in Mayan culture, introducing human sacrifice and a centralized military regime based on the exaction of tribute from subjugated neighbors. That brief Mayan revival came to an end as Mayan city-states entered into conflict with each other.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Tumba_de_pakal,_Chiapas.JPG>

Mayan Revival – Temple of the Inscriptions, Palenque, Chiapas, Mexico

In the middle of the 13th century, the fall of the Toltec empire invited new waves of invaders from the north, and aggressive bands of nomads again swept into Mexico, this time with the innovation of bows and arrows. Those groups came to dominate all of central Mexico, though no single force established the kind of hegemony that Teotihuacán and the Toltecs had enjoyed. A group calling themselves the Mexica, who later came to be called the Aztecs, came south after most areas had been claimed, and existed for a while as itinerant mercenaries. Eventually they were driven into a swamp, where they

established a settlement on a small island that was to become Tenochtitlán.



Source: Wikimedia Commons available at
<<https://commons.wikimedia.org/wiki/File:Conquista-de-Tenochtitlan-Mexico.jpg>>

*Tenochtitlán, Capital of the Aztec Empire (250,000 Residents) –
Painting by Diego Rivera, 1945*

One of their patrons allowed them to establish a monarchy in 1376, which, allied with two other city-states, fought itself to independence and eventual control of central Mexico. The Aztecs developed a rigid, efficient bureaucracy to govern their complex society and extensive dominions, in a system that revolved around militarism, tribute and

sacrifice. Tenochtitlán grew to a great city of perhaps 250,000 inhabitants and was the capital of an empire that included as many as 30 million people, more than any country in Europe. Although the imperial economy was based on expansion and tribute, the majority of the people subsisted in the agricultural sector, raising primarily corn, beans, chilis, and squash – much as the people of Mexico had for many centuries.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Aztec_Empire_c_1519.png>

The Aztec Empire in 1519

Spanish Conquest of Mexico (1521). Initial Spanish arrivals on the Caribbean coast of Mexico were attacked and driven away by Amerindians. But having heard rumors of inland treasures, the Spanish returned. Hernan Cortés arrived at the Yucatan peninsula on an expedition from Cuba in 1519. He established a coastal base at Veracruz, and then he sank his ships to leave his men no choice but to fight to the utmost to conquer Tenochtitlán. Cortés enjoyed numerous advantages over his Aztec opponents, including horses, war dogs, and cannon that gave a psychological edge and technological superiority.



Source: Wikimedia Commons, available at
<https://commons.wikimedia.org/wiki/File:Retrato_de_Hern%C3%A1n_Cort%C3%A9s.jpg>

*Hernán Cortés, Conqueror of the Aztec Empire of Mexico –
Spanish Conquistador from Medillin, Castile, Spain*

Cortés received the aid of thousands of Amerindian troops and porters, as several city-states saw an opportunity to rid themselves of Aztec domination. Four hundred years earlier, the exiled Toltec emperor had promised to return from where the sun rose and left arrows through saplings to mark his way. Allegedly he was also fair skinned and bearded, so when the Spanish arrived from the east, with fair complexions, beards and crosses, in a year that corresponded to the prophesy, the Aztec emperor could not be sure they were not incarnations of the Toltec king, or perhaps even deities.



Source: Wikimedia Commons, available at
<https://commons.wikimedia.org/wiki/File:The_Meeting_of_Cort%C3%A9s_and_Montezuma.jpg>

Meeting of Hernán Cortés and Moctezuma, Aztec Leader, Tenochtitlán, Mexico, 1519 – Painting by Unknown Artist, Second Half of 17th century

Cortés was able to enter Tenochtitlán and take the emperor Moctezuma II hostage. The Spanish leader had to return to the coast to repel a rival force of conquistadors, and upon his return to Tenochtitlán his army was driven out of the city. After months of effort, using boats to attack the island city from the water as well as land attacks along the causeways connecting the city to the mainland, Cortés finally captured Tenochtitlán on August 13, 1521.



Source: Wikimedia Commons, available at
<https://commons.wikimedia.org/wiki/File:The_Conquest_of_Tenochtitlan.jpg>

*Hernán Cortés's Successful Siege of Aztec Tenochtitlán, August 1521–
Painting by Unknown Artist, Second Half of 17th century*

Spanish Colonization of Mexico (1521-1700). Cortés rewarded his troops with towns in the Spanish colony of New Spain, to be used for personal profit. Under the encomienda system, a Spanish soldier became an encomendero and received tribute from the town as well as free labor. The encomendero was responsible for order in the village, Indian welfare, and Christianization of the local populace. That system proved to be an effective vehicle for victimization of the native population, as Indians were overworked, cheated, alienated from their lands, separated from their families, and physically mistreated. The encomienda system, in addition to wars of conquest and disease carried by the invaders, reduced the native population from about 25 million to about 1 million in the hundred years following Spanish arrival.



Source: Wikimedia Commons, available at
<<https://commons.wikimedia.org/wiki/File:Kingsborough.jpg>>

Part of the Codex Kingsborough – A 16th-century Pictorial Manuscript in a Lawsuit Against Abusive Spanish Encomenderos for Mistreatment

The Amerindians were exploited and abused by the Spanish who viewed them as lazy, backward, and barely human. Their legal status classified them as wards of the church and crown, who may have held genuine concern for Amerindian welfare, but the dependence of the colony on Amerindian labor precluded significant amelioration of their conditions. Occasional localized revolts by the native populations were easily suppressed by the colonial power. Although the Spaniards were

initially lured by gold, silver proved to be the abundant resource that made New Spain a prized colony. Silver was being mined by 1530, and hugely productive silver mines were discovered by the late 1540s. The mines spawned local economies as merchants, ranchers, and craftsmen congregated to service the extensive labor forces.



Source: Wikimedia Commons, available at
<https://commons.wikimedia.org/wiki/File:Adentro_de_la_mina_de_el_Eden,_Zacatecas.jpg>

Eden Silver Mine, Zacatecas, Mexico

Viceroyalty of New Spain (1700-1810). New Spain contributed to the Spanish economy in a purely extractive colonial system that maintained subject territories as sources of raw materials and markets

for processed goods. That system prohibited the development of manufacturing or processing industries in the colony, to protect firms in Spain, which sold their products at highly inflated prices to colonial populations. Agriculture remained the occupation of the majority in New Spain, primarily producing for domestic consumption.



Source: Wikimedia Commons available at
 <[https://commons.wikimedia.org/wiki/File:Mapa_del_Virreinato_de_la_Nueva_Espa%C3%B1a_\(1819\).svg](https://commons.wikimedia.org/wiki/File:Mapa_del_Virreinato_de_la_Nueva_Espa%C3%B1a_(1819).svg)>

The Spanish Viceroyalty of New Spain in 1819 (Non-white Areas)

The Spanish introduced new crops, such as citrus, wheat, and sugar cane, but the colonists were not allowed to grow grape vines or olive trees so as to protect the wine and olive oil merchants of Spain.

Moreover, anything sold to other Spanish dominions in the Caribbean or the Orient had to be transported by Spanish ships, through the ports of Acapulco or Veracruz, and was subject to duties paid to the crown.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:16th_century_Portuguese_Spanish_trade_routes.png>

Spanish (White) and Portuguese (Blue) Convoy Routes in the 16th century – All Trade in Mexico Went Through Acapulco or Veracruz

In the 18th century, New Spain was Spain's most valuable overseas possession, accounting for 75 percent of all income from Spanish colonies. That outcome was aided by ending merchant monopolies, enhancing competition in shipping, and lowering taxes. Another crucial factor was a boom in silver output, occasioned by advances in technology and the discovery of new mines, such that Mexico produced as much silver as the rest of the world. Other important products included cochineal dye, sugar, textiles, ceramics, glass, tobacco, hemp, cacao, vanilla, and hides. Manufacturing only played a minor role, and 93 percent of exports consisted of silver, cochineal, and agricultural products.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Silos,_Acatl%C3%A1n,_Hidalgo,_M%C3%A9xico,_2013-10-11,_DD_02.JPG>

Conical Cereal Silos, Near Acatlán, Hidalgo, Mexico

Struggle for Independence (late 18th-early 19th centuries).

Two forces conspired to motivate the Mexican struggle for independence – class struggles and conflicts between the crown and the church. By the late 18th century, the population of New Spain, amounting to 4.5 million total, included 3.5 million Amerindians, 1 million criollos (born in New Spain of Spanish descent, retaining European features and culture), and 15,000 peninsulares (born in Spain). The rest of the population comprised various ethnic mixes. The Amerindian and other colored populations, of course, resented both

criollos and peninsulares. The criollos resented their status as second-class citizens compared to the Spaniards, in terms of access to positions of importance, influence in policy, and social standing. Furthermore, the criollos were aware of successful revolts elsewhere, most notably in the English colonies of North America and in France. However, revolutionary inclinations of the criollo did not include consideration of Indian welfare. Rather, the colonists sought to replace the colonial power, but retain the essential exploitative structure of the colony.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Retrato_de_familia_Fagoga_Arozqueta_-_An%C3%B3nimo_ca.1730.jpg>

*The Fagoaga Arozqueta Criollo Family, Mexico City, 18th century –
Criollos Led the Struggle for Mexican Independence*

Rebellious factions within the Catholic church were concerned with better treatment of Amerindians. However, the church was also reacting to the Spanish crown's efforts to curb church influence in the colonies, such as the expulsion of Jesuits from the colonies and the Act of Consolidation, which confiscated the church's charitable funds.



Source: Wikimedia Commons available at
<[https://commons.wikimedia.org/wiki/File:Murales_Rivera -
Ausbeutung_durch_die_Spanier_1_perspective.jpg](https://commons.wikimedia.org/wiki/File:Murales_Rivera_-_Ausbeutung_durch_die_Spanier_1_perspective.jpg)>

*Spanish and Criollo Exploitation of Indigenous Labor –
Mural Painting by Diego Rivera, c. 1945*

War for Mexican Independence (1810-1821). The War for Mexican Independence was initiated by a priest, Miguel Hidalgo, who incited his parishioners to take over a nearby town. The rebels were joined by the local militia, and the movement gathered momentum and captured a series of towns and cities. Due to excessive pillaging by his followers, Hidalgo stopped short of taking Mexico City. A few months later, Spanish forces routed the rebels and executed the leaders, including Hidalgo. Another priest, José Maria Morelos, continued the revolt but turned to guerrilla warfare in an effort to effect a social revolution based on 19th-century liberalism. Alarmed by the reformist aims of the movement, criollos sided with the Spanish to uphold the existing social system. Morelos was eventually captured and killed.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Retrato_del_excelent%C3%ADsimose%C3%B1ordon_Jos%C3%A9_Mar%C3%ADda_Morelos.png>

*José Maria Morelos (1765-1815) –
Led Unsuccessful Social Revolution in Mexico's War for Independence*

Meanwhile in Spain, King Ferdinand VII was forced to accede to liberal pressures for a bill of rights, anticlerical reform, and acknowledgment of the sovereignty of the people. As a result, conservatives in New Spain joined the independence movement with the intention of preserving the status quo after removing the colonial power. Included among the conservatives were several army officers, most notably Colonel Agustín de Iturbide who led the revolutionary forces to victory in September 1821. His stated intent was to institute a

constitutional monarchy with a strong role for the church, thereby gaining the loyalty of liberals and conservatives alike. Iturbide then had himself crowned emperor, but had to abdicate in 1823 in the face of a strong anti-monarchist movement, whose loyalty to Iturbide ended after control had been wrested from the Spanish. The Spanish attempted reconquest in 1829, but were repulsed under the military leadership of Antonio López de Santa Anna, who would dominate Mexican politics for the next 25 years.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Emperador_Agustin_de_Iturbide.JPG>

*Agustín de Iturbide (1783-1824) –
Liberator (1821), Emperor of Mexico (1822-1823), Executed (1824)*

Independent Mexico (1821-present)

Loss of Texas, New Mexico, and California to the United States (1836-1850). The Republic of Mexico included the northern territories of Texas, New Mexico, and California. To promote the development of Texas, Mexico facilitated immigration of Americans to the area, but found it impossible to integrate those newcomers into Mexican society. As tensions between the two cultures mounted, the Americans declared Texas an independent republic in 1835. Santa Anna led the Mexican forces against the Lone Star State, defeating the Americans at the Alamo on March 6, 1836.



Source: Wikimedia Commons available at
<<https://en.wikipedia.org/wiki/File:FalloftheAlamo.jpg>>

Battle of the Alamo, 1836, Texas Became the Lone Star Republic (1836-1845) – Painting by Robert Jenkins Onderdonk, 1903

Santa Anna's policy of executing all prisoners evoked strong opposition, and men and supplies came from the United States to support the Texans. By the end of April the Mexican army had been routed and Santa Anna captured. He then signed treaties promising not to interfere with the Texan independence movement and that he would lobby for Mexican recognition of the Lone Star State. The Mexican congress vehemently rejected the terms. In 1845, the United States

angered the Mexicans by passing legislation that paved the way for annexation of the Texan Republic.

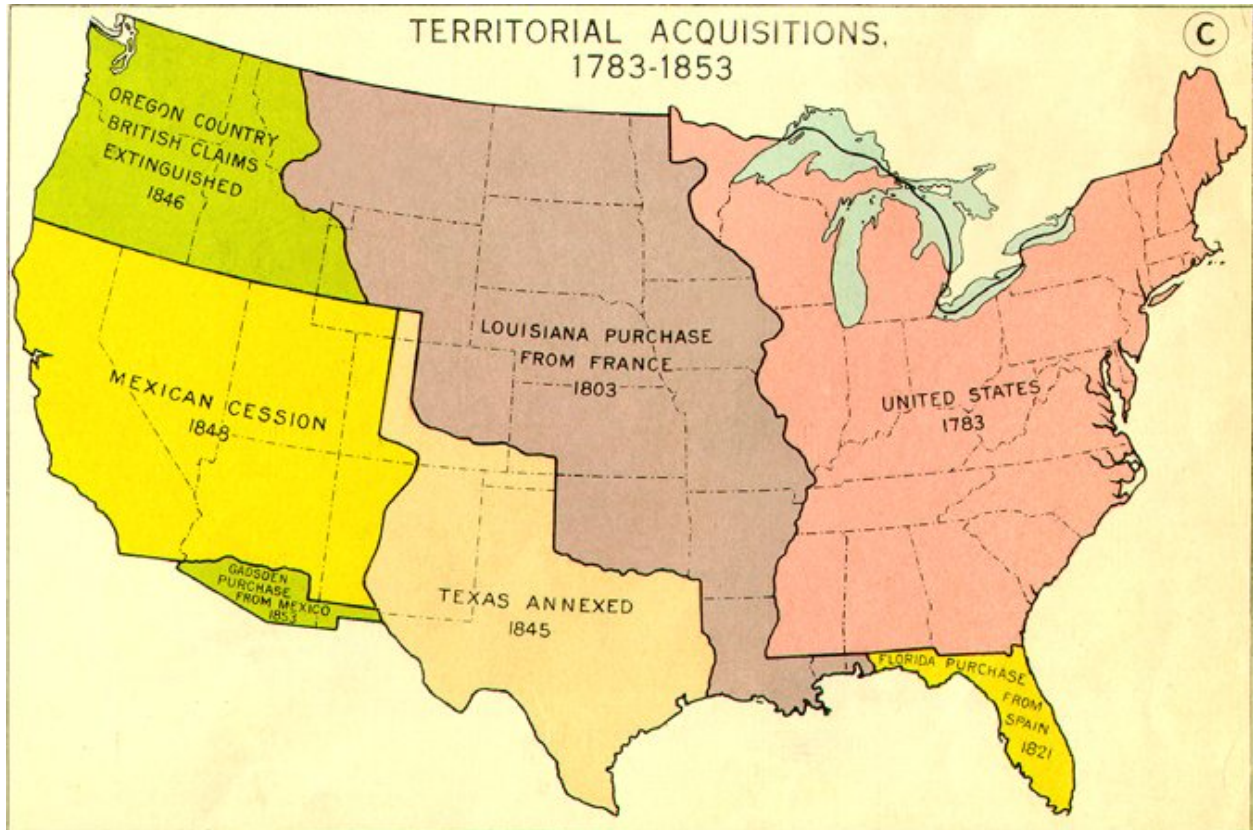


Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Antonio_L%C3%B3pez_de_Santa_Anna,_siglo_XIX,_%C3%B3leo_sobre_tela.png>

*Antonio López de Santa Anna (1794-1876),
President of Mexico (Intermittently 1833-1855) –
Lost Texas (1836), Mexican Cession (1848)*

In negotiations intended to smooth relations, the United States tried to obtain an extension of the boundary of Texas to the Rio Grande, as

well as California and the rest of New Mexico. But the outraged Mexicans refused to speak to the diplomatic envoy. The U.S. then created a pretext for invading Mexico in June 1846 and captured Mexico City in September 1847. The war ended with the Treaty of Guadeloupe Hidalgo in February 1848, in which the United States received all the territories it had initially desired for a payment of \$18,250,000, reducing Mexican territory by half. Initially the territorial loss did not seem very significant since the areas were largely undeveloped. But the gold rush and mining boom in the American West that began shortly thereafter demonstrated the tremendous loss incurred by Mexico as a consequence of the war. The distrust and resentment harbored by Mexicans against the United States following the Mexican-American War has yet to disappear from the popular consciousness.



Source: Wikimedia Commons available at
 <<https://commons.wikimedia.org/wiki/File:United-states-territorial-acquisitions-midcentury.png>>

Mexico's Territorial Losses to the United States – Texas Annexation (1845, Tan), Mexican Cession (1848, Yellow), and Gadsden's Purchase (1853, Green)

Emperor Maximilian and French Rule (1861-1867). In 1861, Mexico emerged much weakened from a civil war between conservative and liberal forces. President Benito Juárez faced the task of paying the army, civil service, and police force with an empty treasury, a monthly deficit of \$400,000, and an economic infrastructure that looked little

different than it had in colonial times. European creditors also demanded repayment, but Juárez declared a two-year moratorium on debt payments. In response, England, France, and Spain agreed in the Convention of London to jointly occupy the Mexican coasts to collect customs receipts in payment of the debts.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Retrato_de_Benito_Ju%C3%A1rez,_1861-1862.png>

Benito Juárez (1806-1872), President of Mexico (1857-1872)

However, the aggressively colonialist French Emperor, Napoleon III, decided to occupy the whole of Mexico to extend his imperial ambitions. In the first military encounter on May 5, 1862 Porfirio Díaz led the Mexican troops to victory, but by June of the following year France had conquered Mexico. Napoleon III installed the Austrian prince, Maximilian, as emperor of Mexico.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Emperador_Maximiliano_I_de_Mexico.jpg>

*Emperor Maximilian I of Mexico (1864-1867) –
Younger Brother of Emperor Franz Josef of Austria-Hungary,
Installed by Emperor Napoleon III of France*

Initially conservative elements in Mexico welcomed the restoration of a monarchy that strongly supported the church. But Maximilian proved to be interested in social reform and did not reverse anticlerical legislation passed by the liberal Mexican government that he replaced. Liberals were not mollified by Maximilian's actions and continued to resist French occupation, using guerrilla warfare in the north.

After the U.S. Civil War ended, the United States supported the Mexican resistance movement. The 1823 Monroe Doctrine had explicitly equated European colonization in the western hemisphere with aggression against the United States. France, threatened by the rise of Bismarck in Germany, recalled troops from Mexico to shore up defenses at home. By May 15, 1867 Mexico again liberated itself from a foreign power. Sadly, the Mexican economy and political system were now in a greater shambles than ever.



Source: Wikimedia Commons available at
<[https://commons.wikimedia.org/wiki/File:A_Village_Near_Mexico_City_\(3675117259\).jpg](https://commons.wikimedia.org/wiki/File:A_Village_Near_Mexico_City_(3675117259).jpg)>

Following Liberation in 1867, Mexico's Political and Economic Struggles Continued – Poor Village Near Mexico City, c. 1865

Mexican Development under Porfirio Díaz (1876-1911). After the expulsion of the French, Juárez and his successor Lerdo undertook various initiatives that provided the basis for a period of economic expansion, including tax reform, investments in education, transportation, and communication, and normalization of relations with the United States and Europe. Nevertheless, Mexico had yet to benefit from 19th-century advances when Porfirio Díaz was elected to the presidency in 1876. During its first 53 years as an independent country,

Mexico had had 75 presidents – a reflection of its extreme political instability. After his term expired in 1880, Porfirio Diaz left office as mandated by the constitution. But upon returning in 1884, he no longer felt compelled to observe term limits and ruled until 1911.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Porfirio_Diaz.jpg>

*Porfirio Díaz, President of Mexico (1876-1880, 1884-1911) –
Brutal Dictator, Strong Reformer*

Díaz's first priority was the maintenance of order, and his agenda included merciless suppression of revolts, campaigns against brigandage in the rural areas, settlement of disputes with the United States, reduced government salaries and downsized bureaucracy, and concerted efforts

to counter smuggling. Those measures aimed to improve the government budget and create an environment conducive to foreign investment. Improvement of rail facilities and ports stimulated trade, and foreign concerns invested heavily in mining and oil extraction. The combination of modernization, rationalization of government finances, and political stabilization permitted an era of sustained economic growth unlike anything experienced in Mexico before, inspiring confidence, unity, and nationalism in the Mexican people.



Source: Wikimedia Commons available at
<<https://commons.wikimedia.org/wiki/File:MetlacBridgeKahlo.JPG>>

*Díaz Promoted Railroad Construction in Mexico –
Metlac Railway Bridge, Engineering Marvel*

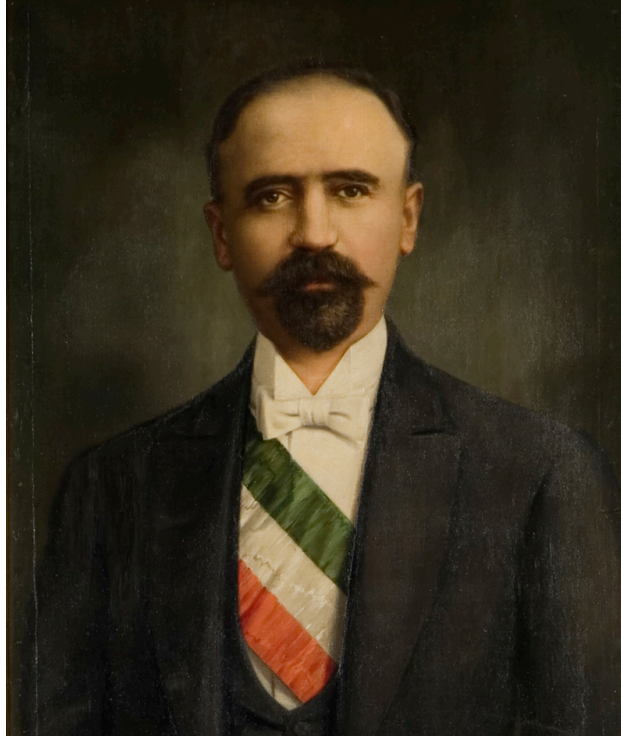
However, the benefits of economic growth accrued to a small elite while the lower classes remained overwhelmingly impoverished. In the industrial sector, the Díaz administration fueled resentment by supporting capitalist owners and forcibly suppressing strikes. A major source of future instability lay in the extreme inequality of land ownership, where giant haciendas concentrated most of the land in the hands of a wealthy few. The vast majority of the rural population remained poor, landless, and dependent on large landowners.



Source: Wikimedia Commons available at
<https://en.wikipedia.org/wiki/File:Don_Luis_Terrazas.jpg>

*Don Luis Terrazas, Mexico's Largest Landowner in Early 20th century –
Ran 500,000 Cattle, Governed Chihuahua State, Symbolized Inequality*

The Mexican Revolution (1911-1920). The lack of articulation of economic growth to the majority of Mexicans created the conditions for a revolt against the virtual dictatorship of Díaz. Unequal distribution of gains, combined with new ideologies regarding social justice and equity emerging from Europe, paved the way for a new liberalism that espoused land and income redistribution. Several factions rose in revolt in November of 1910, led by Francisco Madero. Initial rebel victories persuaded Díaz to resign, thus removing the uniting element of the rebels and allowing the emergence of rivalries and conflict within the revolutionary movement. Madero was elected president in 1911, but both counter-revolutionaries and disaffected erstwhile allies continued the revolt against the central government.



Source: Wikimedia Commons available at
<[https://commons.wikimedia.org/wiki/File:Madero_Retrato_\(Castillo_de_Chapultepec\).png](https://commons.wikimedia.org/wiki/File:Madero_Retrato_(Castillo_de_Chapultepec).png)>

Francisco Madero (1873-1913), President of Mexico (1911-1913)

Emiliano Zapata emerged as a significant revolutionary leader who fought for land reform against Madero as well as Díaz. In February 1913, Victoriano Huerta, a general who had supported Madero and served in his cabinet, turned on the president in a military coup. The revolution was now led by Venustiano Carranza and Pancho Villa in the North and Zapata in the south, although the former fought in the name of the constitution while Zapata continued to fight for restoration of land rights to the native peoples of his area.

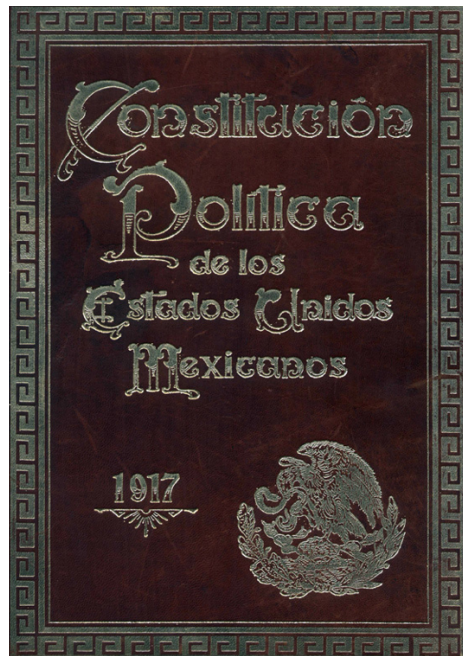


Source: Wikimedia Commons available at
<[https://commons.wikimedia.org/wiki/File:Zapata,_Leader_of_Mexican_Revolution_of_the_South_\(30349230851\).jpg](https://commons.wikimedia.org/wiki/File:Zapata,_Leader_of_Mexican_Revolution_of_the_South_(30349230851).jpg)>

Emiliano Zapata (1879-1919), Revolutionary Hero in Southern Mexico, Fought for Land Reform – “I’d rather die on my feet than continue living on my knees.”

Following U.S. intervention during the occupation of Veracruz, Huerta resigned. Civil war continued as different rebel factions fought over who would become president, pitting constitutionalists against more radical reformers. After Carranza took the presidency, Zapata and Villa continued to fight against him, but Zapata was killed in a ruse in 1919. When the U.S. recognized Carranza’s government, Villa vented

his frustration by attacking Americans and American interests along the border. In 1920 Carranza attempted to appoint a successor rather than hold elections, but his spokesman Álvaro Obregón turned on him in revolt and took over the government. Carranza was assassinated, Obregón was elected president, and the political situation in Mexico began to stabilize. The economy was again in ruins, and the Mexican population of 15 million had been reduced by as much as 2 million during the Revolution.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Portada_Original_de_la_Constitucion_Mexicana_de_1917.png>

*The Constitution of 1917 –
Set the Framework of Mexico's Political and Economic Systems*

Post-revolutionary Mexico (1920-1946). The election of Álvaro Obregón began a relatively tranquil period, interrupted by some violence in 1923-24 which Obregón managed to suppress. The economy, in addition to the ravages of civil war, suffered from a global economic slump that depressed prices of most of Mexico's principal products except for oil. By 1921, Mexico was the world's third largest oil producer at 193 million barrels. Obregón initiated land reform in Mexico, redistributing 3 million acres from haciendas to 624 rural villages during his term, benefiting about 140,000 rural poor.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Alvaro_Obreg%C3%B3n.jpg>

*Álvaro Obregón, President of Mexico (1920-1924) –
Began Mexico's Land Reform, Lost His Right Arm in the Battle of
Celaya (1915) While Fighting Pancho Villa*

The next president, Plutarco Calles, continued by distributing 8 million acres mostly to communal ejidos, in conjunction with irrigation investments, agricultural education and extension services, and rural credit programs. Land reform received a powerful boost with the 1934 election of Lázaro Cárdenas, who redistributed 49 million acres.

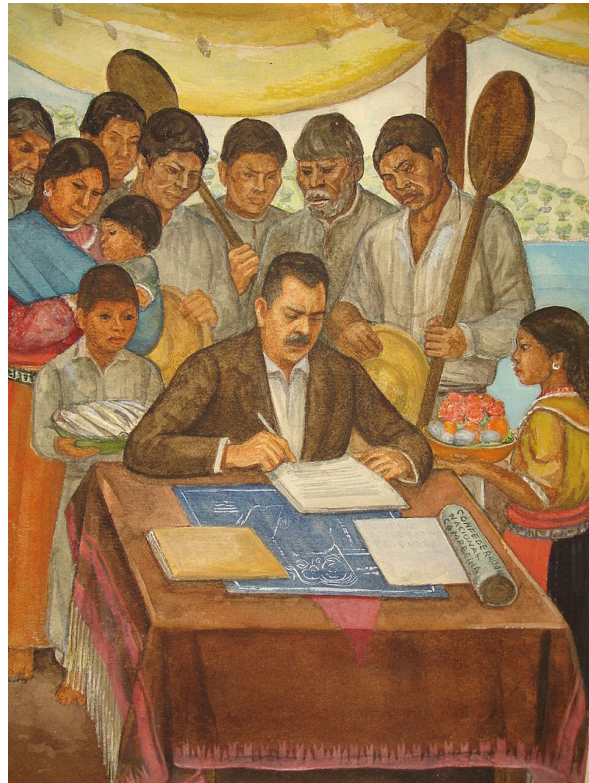


Source: Wikimedia Commons available at
<[https://commons.wikimedia.org/wiki/File:En_el_ejido_Cuauht%C3%A9moc_\(28\)_5618095756.jpg](https://commons.wikimedia.org/wiki/File:En_el_ejido_Cuauht%C3%A9moc_(28)_5618095756.jpg)>

*Ejido (Communally-owned Farm) in Cuauhtémoc, Mexico –
By 1940, One-third of Rural Mexicans Had Received Land*

Throughout the period between 1920 and 1946, Mexico enjoyed tenuous relations with the United States. The U.S. delayed recognition of the Mexican government until 1923, because of lobbying efforts by American oil companies who wanted guarantees for the safety of their investments in Mexico. However, Cárdenas nationalized the holdings of 17 oil companies on March 18, 1938 following the companies' refusal to obey a Supreme Court directive that they pay higher wages. Oil revenues declined under the government oil company Petróleos

Mexicanos (PEMEX) due to inadequate investment and depreciated physical capital. Government debt grew, inflation increased, and confidence in the government waned.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Lazaro_Cardenas_Jijilpan.JPG>

Lázaro Cárdenas, President of Mexico (1934-1940), With Mexican Campesinos – Watercolor Painting by Roberto Cuevo del Rio, 1937

However, the onset of World War II provided new opportunities, as Mexico became an important supplier of raw materials to the Allies and, aided by government support, embarked on industrial efforts to make up for wartime shortages of manufactured goods from abroad.

Growing industries included textiles, food processing, chemicals, beer, cement, pig iron, and steel, and were complemented by large increases in electrical capacity.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Steel_mill_Fundidora_Park.jpg>

Steel Production in Mexico, Began during World War II, Now 13th Largest in the World – Former Blast Furnace in Monterrey, Mexico

Modern Mexico (1946-2019). The period immediately following World War II saw sustained economic growth based on large-scale industrialization. Investments in dams, railroads, and paved roads and low tax rates attracted Mexican and foreign investors, and PEMEX doubled production capacity in the six years after WWII. The economy

slowed but continued to grow under Adolfo López Mateos (1958-64), based largely on PEMEX and tourism. During that period the state became more involved in the economy as it purchased controlling interest in numerous foreign-owned industries.



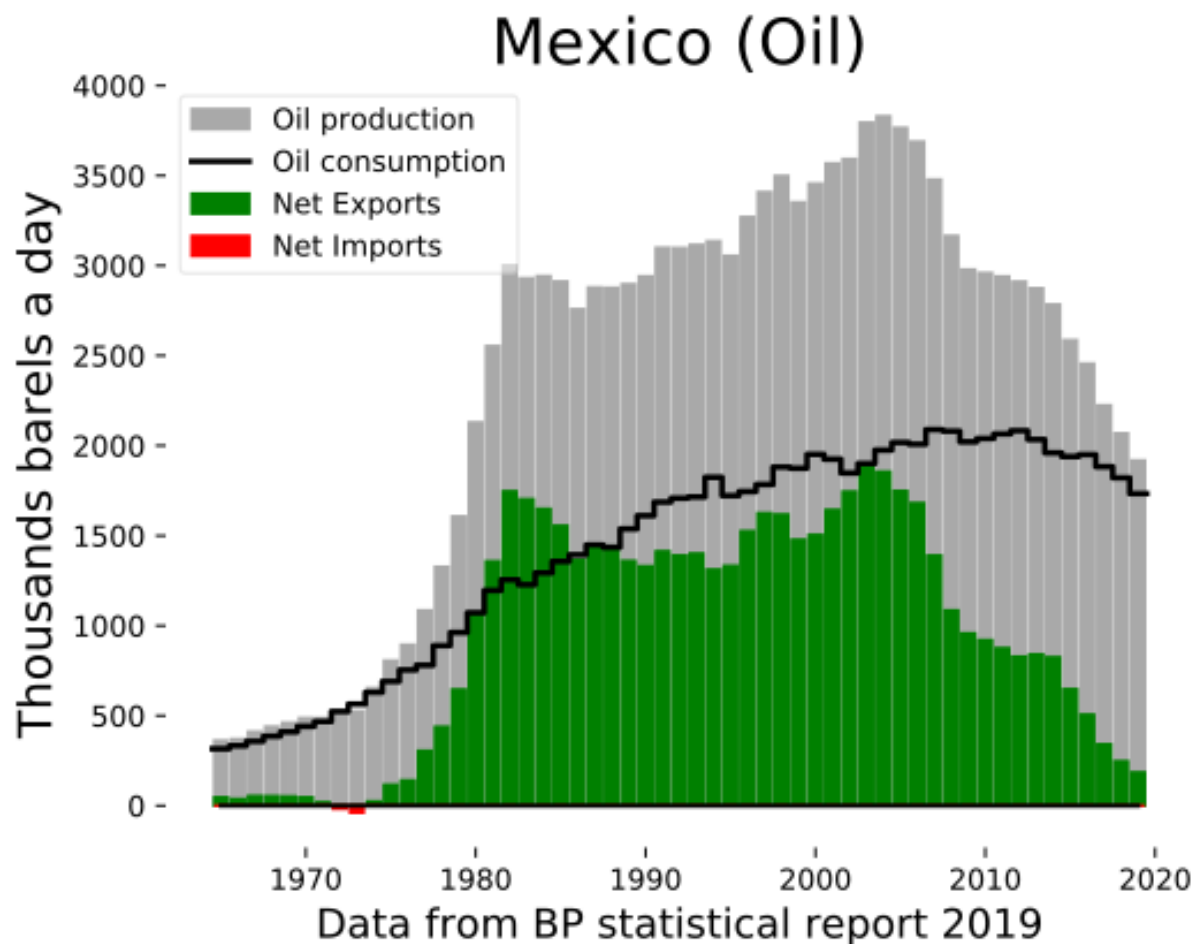
Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Z%C3%B3calo_cdmx.jpg>

*Zócalo Plaza, Historic Center, Mexico City –
45 Million Tourists Generated 16 Percent of GDP in 2019*

Social unrest plagued Mexico starting in the early 1960s, as students, labor, and urban guerrillas reacted against mounting economic inequality, rising cost of living, and political disenfranchisement.

President José López Portillo (1976-82) financed a huge expansion of the government's role in the economy with foreign credit based on

profits from an oil boom. However, expansion of oil production was capital- rather than labor-intensive, and unemployment soared to at least 25 percent. When oil prices declined, Mexico had difficulty servicing its debt, capital began to flow out of the country, and the currency collapsed. In response, Portillo nationalized the banks.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Oil_Balance_Mexico.svg>

*Mexico's Petroleum Production, Consumption,
Net Exports, and Net Imports, 1965-2019*

Carlos Salinas, elected in 1988, dramatically redirected the course of Mexican government by privatizing industries as well as rural land, democratizing by allowing opposition politicians to hold office, and strengthening ties to the United States through NAFTA. Although those measures restored a degree of economic stability and foreign investor confidence, they also provoked the Zapatista rebellion in Chiapas in 1994. Nonetheless, Salinas' successor, Ernesto Zedillo (1994-2000), continued market reforms and political liberalization. In 2000, the 71-years-long, uninterrupted rule of the Institutional Revolutionary Party (PRI) ended when Vicente Fox (2000-2006) of the National Action Party (PAN) was elected President. Fox worked to improve relations with the United States and to stabilize the Mexican economy.

presidency to the PRI and was a controversial and unpopular president who tried to liberalize the energy sector but wound up facing allegations of corruption. Andrés Manuel López Obrador (AMLO, 2018—) of the Party of the Democratic Revolution (PRD) was elected President in 2018 in his third run for that office. AMLO is a firebrand populist who advocates for the downtrodden in society and has promised to fight corruption and excessive government spending.



Source: Wikimedia Commons available at
<[https://commons.wikimedia.org/wiki/File:Reuni%C3%B3n_con_el_Presidente_Electo,_Andr%C3%A9s_Manuel_L%C3%B3pez_Obrador_8_\(cropped\).jpg](https://commons.wikimedia.org/wiki/File:Reuni%C3%B3n_con_el_Presidente_Electo,_Andr%C3%A9s_Manuel_L%C3%B3pez_Obrador_8_(cropped).jpg)>

*Andrés Manuel López Obrador,
President of Mexico (December 2018-present)*

In 2019, Mexico had a population of 127.6 million, and its annual rate of population growth was 1.1 percent. Life expectancy at birth in Mexico, 75 years, was less than that of the United States, 79 years. Mexico's rate of adult literacy was 95 percent. Between 1995 and 2019, the annual rate of growth of Mexico's per capita income (measured by the World Bank at Purchasing Power Parity in constant 2017 dollars) was a modest 1.2 percent (the United States grew at an annual rate of 1.5 percent in that period). As a result, Mexico's level of per capita income increased from \$8,483 to \$20,582 (whereas the American level rose from \$28,691 to \$65,298). In 2019, Mexico ranked only 74th of 189 countries in the UNDP's Human Development Index, a respectable 60th of 190 countries in the World Bank's Ease of Doing Business index, and a shameful 130th of 198 countries in the Corruption Perceptions Index compiled by Transparency International.

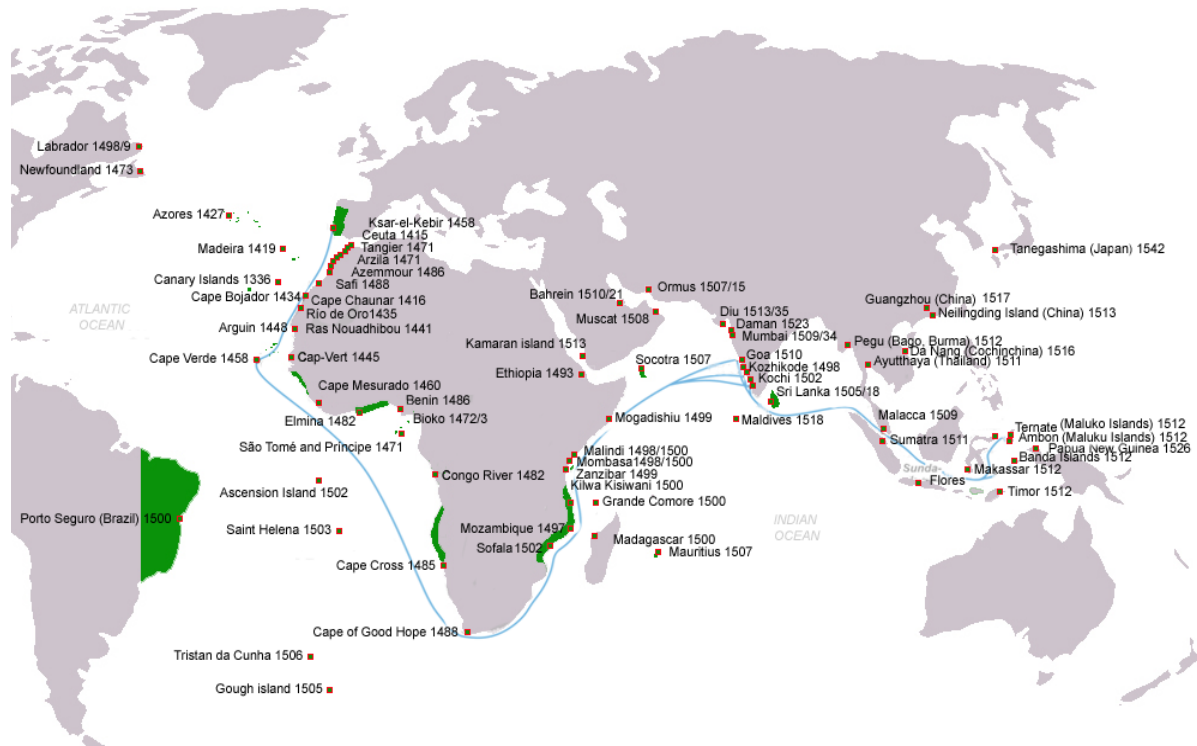


Source: Wikimedia Commons available at
< <https://commons.wikimedia.org/wiki/File:Mx-map.png> >

Contemporary Mexico

Portuguese and Spanish Colonization – Brazil versus Mexico, Peru, and Argentina

Motives for Colonization. Portugal led Europe into the Age of Exploration in the 15th century. Portuguese explorers used mercantile tradition, navigational discoveries, and new shipbuilding technologies to discover a sea route around Africa to the Indian Ocean. The Portuguese crown had two goals in promoting exploration – commercial (to break the Muslim monopoly of trade in the Indian Ocean) and religious (to spread the Catholic faith). After Portuguese explorers discovered Brazil in 1500 en route to India, Portugal's primary focus remained the rich spice trade with Asia.

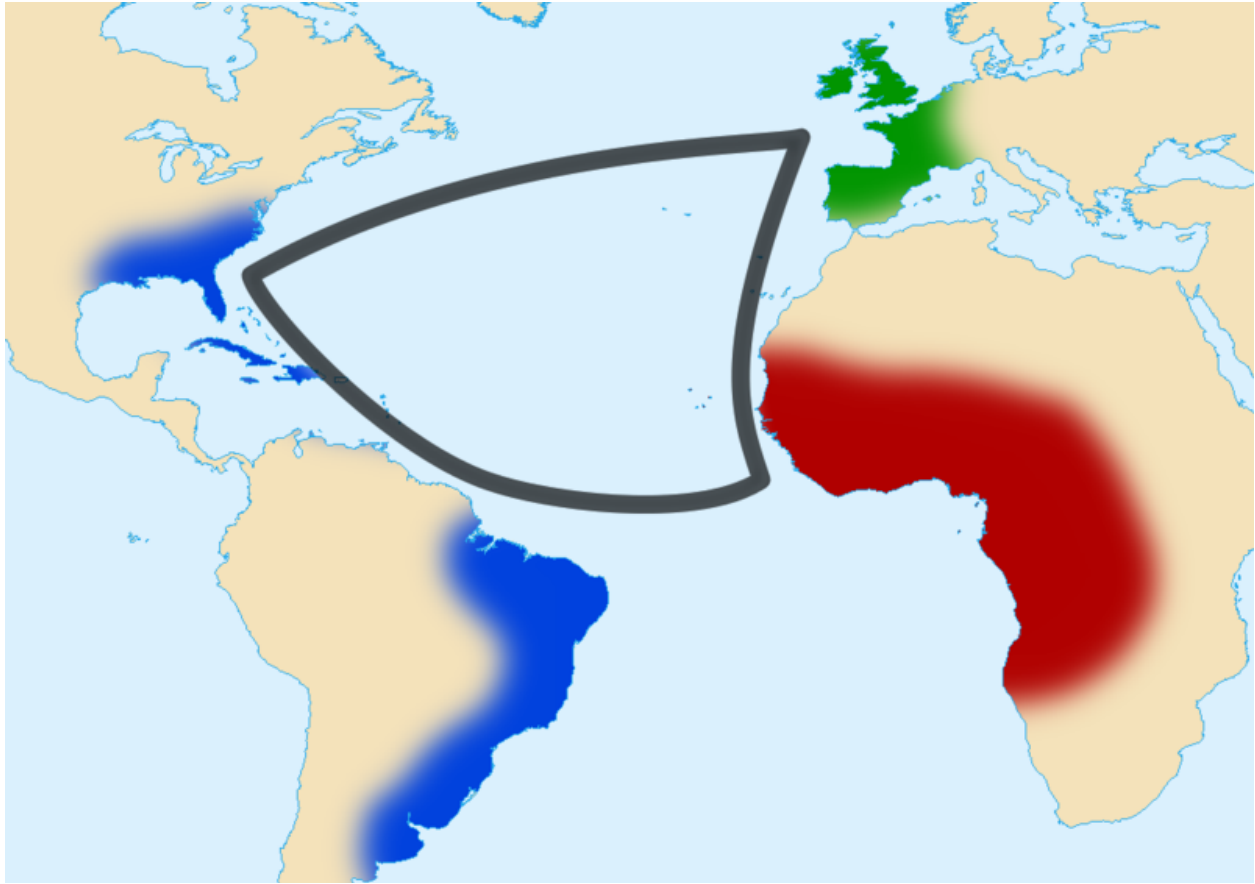


Source: Wikimedia Commons available at

<https://commons.wikimedia.org/wiki/File:Portuguese_discoveries_and_explorationsV2en.png>

Portuguese Trade Routes and Settlements (Green) – 1415-1543

Portugal's original aims in Brazil were to construct fortress ports, dominate the export of brazilwood to Europe (for red dye), and ensure that Spain would not control all of the Americas. In the second half of the 16th century, Portugal began to settle Northeastern Brazil and import African slaves to produce sugar.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Triangular_trade.png>

Triangular Trade Route – Portuguese Cloth and Manufactures to Africa, African Slaves to Brazil, Brazilian Sugar and Rum to Portugal

Spain, Portugal's principal rival, increased its power within Europe considerably in the 15th and 16th centuries. The union of the two crowns of Aragon and Castile occurred in 1479, officially forming Spain, and the Spanish ended eight centuries of Moorish settlement in Iberia by absorbing Granada in 1492. In that year, Christopher Columbus,

seeking a westerly route to Asia for the Spanish crown, discovered the Americas.



Source: Wikimedia Commons, available at
<https://commons.wikimedia.org/wiki/File:The_return_of_Columbus_in_Spain,_1493.jpg>

*King Ferdinand and Queen Isabella Welcoming Christopher Columbus
On His Return to Spain in 1493 – Painting by Ricardo Balaca, 1874*

In 1516, Spain under Charles V became a part of the Habsburg Empire, including Austria and the Low Countries. Latin America was soon the primary focus of Spanish imperial ambitions. The Spanish conquerors (*conquistadores*), mostly from Castile, were younger sons of noble families who sought riches because they could not inherit wealth.

Traders, mostly from Aragon, desired to exploit America silver and gold, and the Spanish crown hoped to spread Christianity and out-do its Portuguese rival.

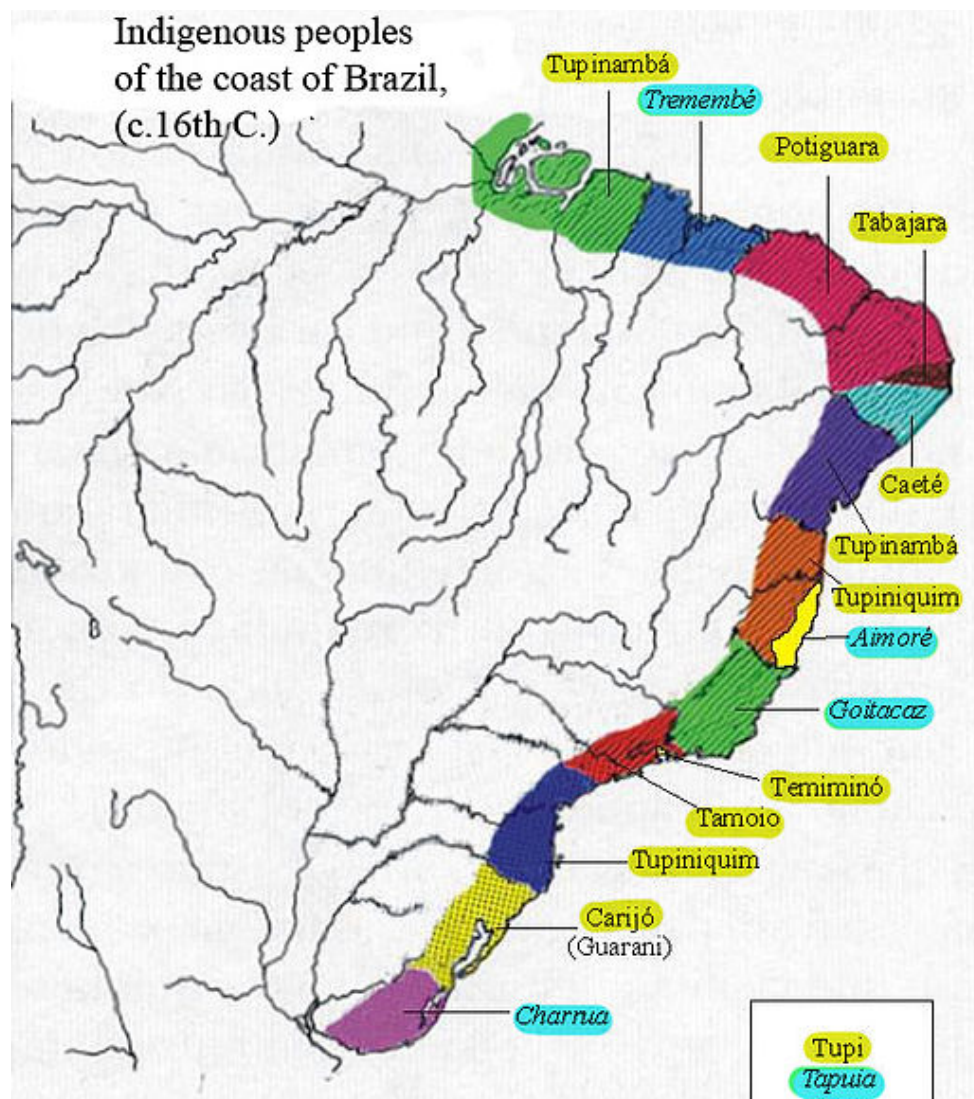


Source: Wikimedia Commons, available at
<https://commons.wikimedia.org/wiki/File:Portrait_of_Francisco_Pizarro.jpg>

Francisco Pizarro, Spanish Conquistador and Conqueror of the Inca Empire of Peru – Portrait by Amable-Paul Coultan, 1835

Conquest. Portugal's gradual conquest of coastal Brazil between 1500 and 1533 was relatively easy because the region was sparsely populated. Only 2-3 million Amerindians inhabited the area that later

became Brazil (nearly half of South America). The Portuguese encountered scattered opposition from the dominant Tupi people. But their main opponent was France, which established a fortified settlement in Guanabara Bay (near Rio de Janeiro) between 1555 and 1567.



Source: Wikimedia Commons available at
<[https://commons.wikimedia.org/wiki/File:Map_of_indigenous_peoples_of_Brazil_\(16th_C.\).jpg](https://commons.wikimedia.org/wiki/File:Map_of_indigenous_peoples_of_Brazil_(16th_C.).jpg)>

Indigenous Amerindian Peoples of Coastal Brazil, 16th century

In contrast, when Spanish conquistadors conquered Mexico (1519-1521), they had to overcome the rich Aztec Empire. The Aztecs ruled 30 million people from their capital at Tenochtitlán. The unlikely conquest of Hernán Cortés relied on horses, cannons, smallpox, assistance from Aztec rivals, the Aztecs' fear that Cortes was the incarnation of an exiled Toltec emperor, and the Spaniards' fortunate capture of Moctezuma II, the Aztec emperor.

A parallel unexpected Spanish conquest took place in Peru (1532-1572). The powerful Inca Empire, based on agriculture and metallurgy, ruled 8 million subjects from its capital at Cuzco. Francisco Pizarro and only 180 conquistadors captured the Inca emperor, Atahualpa, and exploited rivalries remaining from a recent Incan civil war. The Spanish captured the last Incan ruler, Túpac Amaru, in 1572.

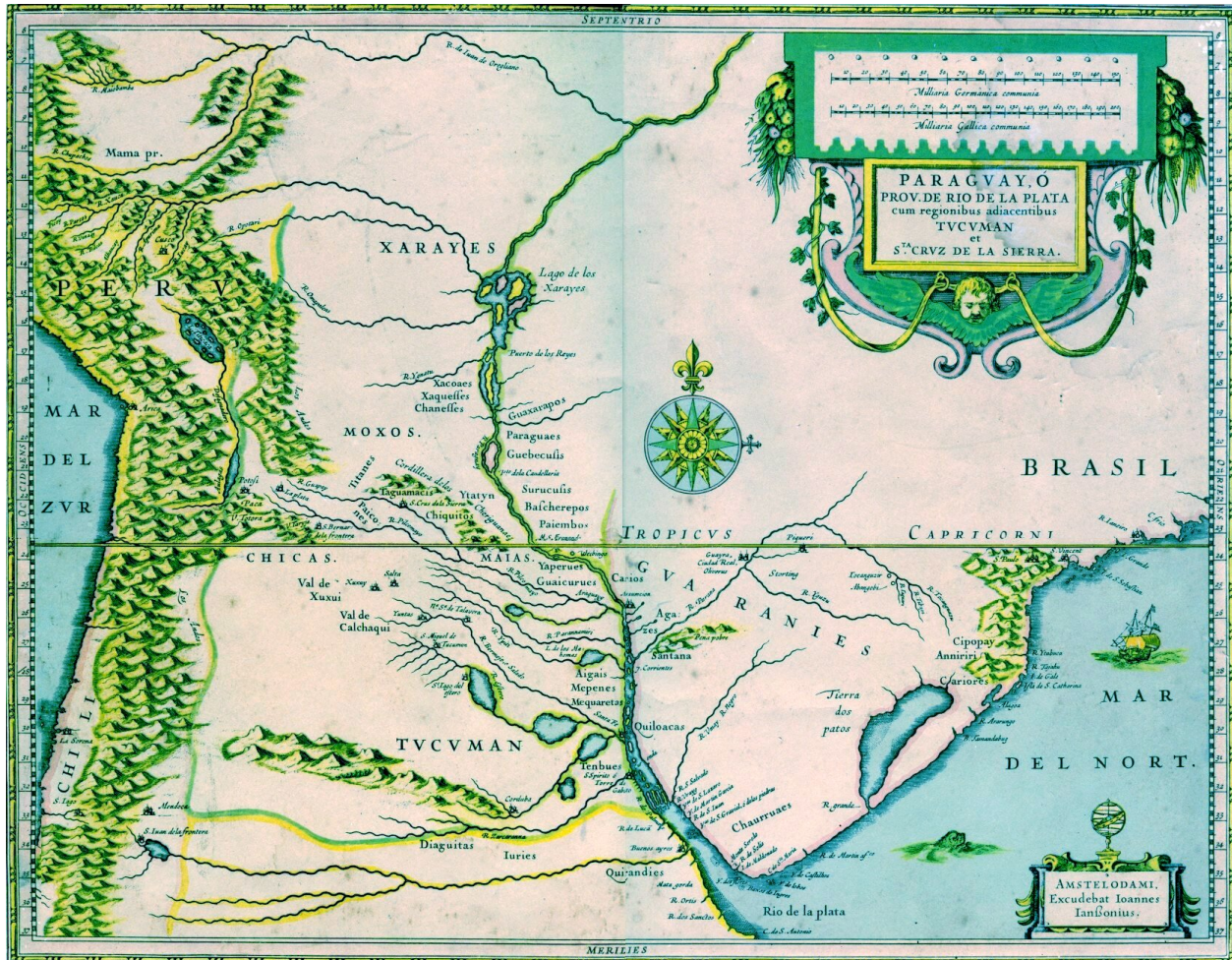


Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Over_Machu_Picchu.jpg>

*Machu Picchu, Built in the 16th century –
Reflects Inca Strength, Religion, and Craftsmanship*

Spain's conquest of Argentina (1536-1580), then a backwater lacking metals, was far less difficult. Only 1.5 million Amerindian peoples, mostly Diaguita, lived in Argentina. For Spain, Argentina was an offshoot of richer Peru. Spain conquered northwestern Argentina in the 1570s to serve as a supply area. In the River Plate region, Pedro de

Mendoza's initial settlement at Buenos Aires in 1536 was destroyed by Amerindians, but the Spanish built a permanent city there in 1580.

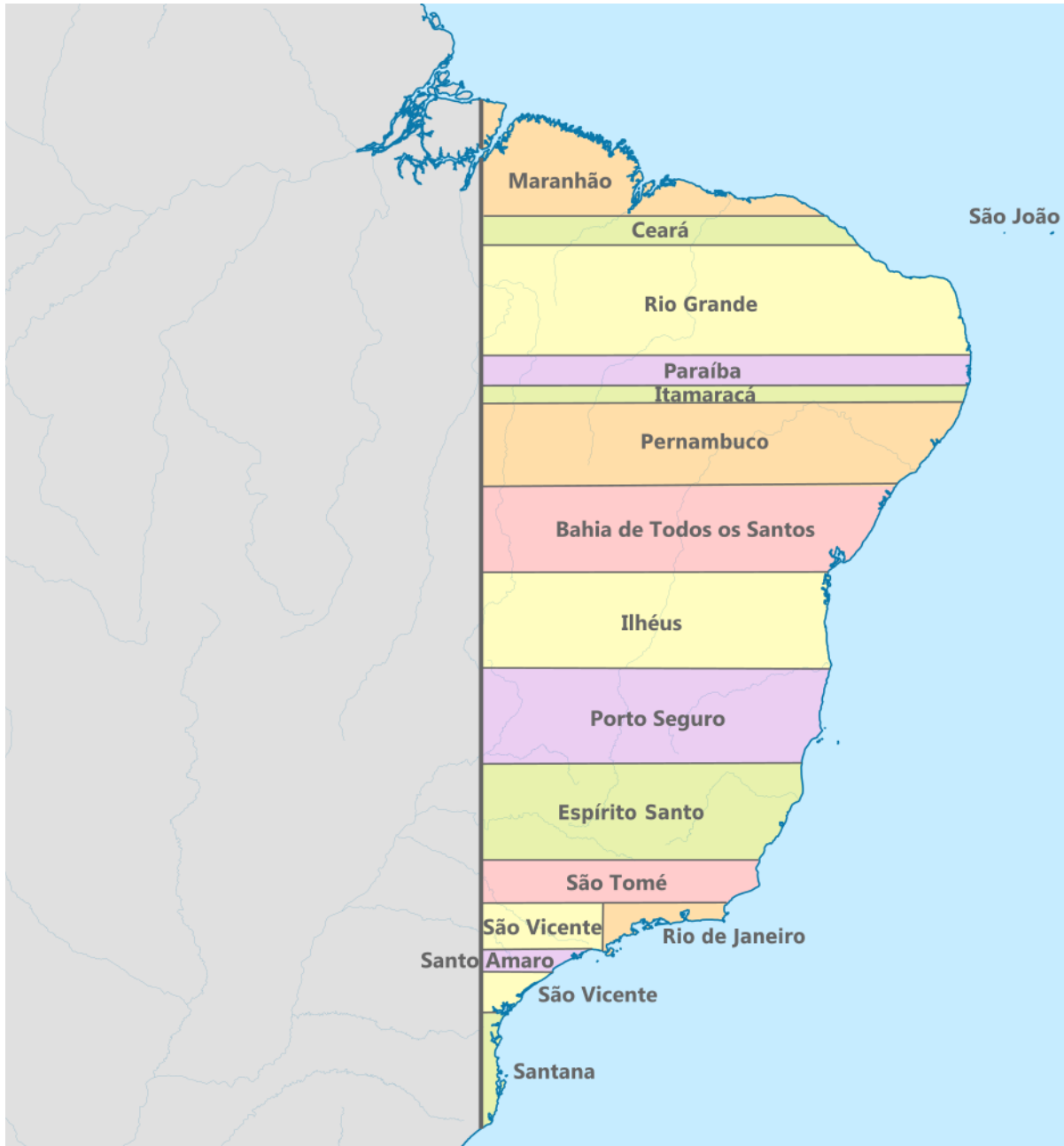


Source: Wikimedia Commons available at
[https://commons.wikimedia.org/wiki/File:Paraguay - O Prov de Rio de la Plata - cum regionibus adiacentibus Tvcvman et Sta. Cruz de la Sierra - ca 1600.jpg](https://commons.wikimedia.org/wiki/File:Paraguay_-_O_Prov_de_Rio_de_la_Plata_-_cum_regionibus_adiacentibus_Tvcvman_et_Sta._Cruz_de_la_Sierra_-_ca_1600.jpg)

*Rio de la Plata (Argentina) and Paraguay –
 Map Drawn c. 1600 by Jodocus Hondius, Flemish-Dutch Cartographer*

Colonial Rule. Portugal ruled colonial Brazil with governors-general who were responsible to the crown. The state granted huge

landed estates to elite Portuguese immigrants who imported African slaves to produce sugar, cotton, and tobacco. That pattern created enormous disparities in wealth that plague contemporary Brazil. The Portuguese rulers imposed a mercantilist system, permitting Brazilian trade only with Portugal, importing Brazilian raw materials, exporting Portuguese finished goods to Brazil, and taxing all trade to transfer wealth to Portugal.



Source: Wikimedia Commons available at
 <https://commons.wikimedia.org/wiki/File:Brazil_in_1534.svg>

Original Portuguese Land Grants in Brazil – Pictured in 1534

The Spanish colonial system was similar in design. Spain practiced strict mercantilism in all of its American possessions during

the 16th and 17th centuries, but a weakened Spain permitted trade liberalization in the 18th century. All trade between Spanish America and Spain moved in two annual convoys of about 100 ships each to control piracy and ease taxation.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:16th_century_Portuguese_Spanish_trade_routes.png>

Spanish (White) and Portuguese (Blue) Convoy Routes in the 16th century – Spanish Convoys Crossed from Havana to Seville

Spanish viceroys governed the Viceroyalties of New Spain (Mexico), Lima (Peru), and (after 1776) Buenos Aires (Argentina) on behalf of the

crown. New Spain grew to be the richest Spanish American colony and by the 18th century produced three-fourths of Spain's colonial tax income. In Mexico and Peru, the Spanish introduced the *encomienda* system in which Amerindian laborers were forced to work on large Spanish estates, and in Peru the Amerindians contributed additional forced labor under the *mita* system, first instituted by the Incas.



Source: Wikimedia Commons, available at
<https://commons.wikimedia.org/wiki/File:Encomienda_en_el_Tucum%C3%A1n.jpg>

*Encomienda System in Tucumán, Colonial Peru –
Painting by Florián Paucke, 18th century*

Due to the paucity of Amerindians and metals in Argentina, Buenos Aires relied on entrepôt trade and smuggling during much of the colonial era. The great Argentine agricultural potential began to be exploited only in the mid-18th century when cattle estates (*estancias*) were created on the pampas, using European immigrant labor.



Source: Wikimedia Commons available at
<[https://commons.wikimedia.org/wiki/File:Cattle_Ranch_\(5451966167\).jpg](https://commons.wikimedia.org/wiki/File:Cattle_Ranch_(5451966167).jpg)>

Cattle Estancia (Ranch), El Calafate, Patagonia, Argentina – Cattle Hides and Salted Meat Contributed Two-thirds of Exports in the 1820s

Export Booms. From its founding as a Portuguese colony in 1500 through independence in 1822 and until the mid-20th century, Brazil experienced a series of boom-and-bust export cycles. The first was with

sugar, produced with slave labor in the Northeast in the 16th and 17th centuries. For 150 years, that region was one of the world's richest plantation economies. But competition from British, French, and Dutch sugar plantations in the Caribbean caused Brazil to lose most of its export market. Mineral discoveries in Minas Gerais allowed Brazil to produce 80 percent of the world's gold and 2.4 million carats of diamonds in the 18th century. At independence, coffee was emerging as Brazil's next cyclical export commodity.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Frans_Post_-_Engenho_de_Pernambuco.jpg>

*Slave-based Sugarcane Production in Pernambuco, Portuguese Brazil –
Painting by Frans Post, 17th century*

Colonial Mexico had three long swings in its pattern of exports. In the 16th century, the Spanish extracted Aztec gold and discovered new deposits of silver. The 17th century was a slump period for Mexican exports because the Amerindian population had declined drastically to only 1 million and metal exports were limited. Mexico boomed in the 18th century by producing half of the world's silver along with cocoa, vanilla, and hides.



Source: Wikimedia Commons available at
<<https://commons.wikimedia.org/wiki/File:Silver-158794.jpg>>

Silver Nugget, Weighing 2.5 Ounces – Mined in Zacatecas, Mexico

Exports from Peru peaked in the 16th and 17th centuries when silver exports, mostly from Potosí, tripled the European stock of silver.

During the 18th century, Peru achieved self-sufficiency in agriculture but no longer had a large export surplus. Argentina's export pattern was the opposite from that of Peru.

The Argentine economy was stagnant during the 17th century. The few exports consisted of transshipped silver from Peru plus grain, flour, and hides. After trade was liberalized in the 18th century, Buenos Aires became an export center and the investment of trading profits in Pampas cattle estates began important exports of cattle hides and jerked beef.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Gauchos_resting_in_the_pampas_by_Rugendas.jpg>

*Argentine Gauchos Resting in the Pampas –
Painting by Johann Moritz Rugendas, 1846*

1822 as a monarchy, the Empire of Brazil, ruled by Pedro I of the Portuguese Bragança line. Brazil suffered few political conflicts and had a subservient military (since it had avoided fighting a war of independence). With one exception (the loss of Uruguay in 1825), Brazil maintained its territorial integrity.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Portrait_of_Dom_Pedro,_Duke_of_Bragan%C3%A7a_-_Google_Art_Project_edited.jpeg>

*Emperor Pedro I of Brazil, Declared Independence from Portugal, 1822
– Pictured in 1835*

The struggles for independence in Spain's American colonies began in 1808 when Napoleon put his brother on the Spanish throne. The War for Mexican Independence (1810-1821) led to a bitter struggle

between the upper class (Spaniards and criollos of Spanish descent) and the lower class (Amerindians and people of mixed ethnicity). Agustín de Iturbide, a conservative officer, led the victory in 1821, declared himself emperor, but was forced to abdicate and a republic was formed in 1823. Mexico fended off a Spanish invasion in 1829 but lost half its territory to the United States between 1836 and 1850.



Source: Wikimedia Commons available at
<<https://commons.wikimedia.org/wiki/File:UnitedStatesExpansion.png>>

*Mexico's Territorial Losses to the United States –
Texas Annexation (1845, Blue), Mexican Cession (1848, Pink),
and Gadsden's Purchase (1853, Brown)*

In Peru and Argentina, juntas loyal to the deposed Spanish king took control in 1808. Peru became independent in 1824, after Simón Bolívar and Antonio de Sucre invaded with Colombian troops. The new Republic of Peru was forced to accept the independence of Bolivia, suffered political instability, and fought unsuccessful regional wars.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Capitulaci%C3%B3n_de_Ayacucho1.jpg>

General Antonio de Sucre Defeated Spanish Forces in the Battle of Ayacucho (1824) and Secured Peru's Independence – Surrender at Ayacucho, Painting by Daniel Hernández, 1924

The loyalist junta in Argentina declared independence in 1816 to form the United Provinces of the River Plate. For nearly half a century, Argentina struggled because of conflicts between federalists and

centralists. Spanish America's turbulent independence thus led to political conflict during much of the 19th century.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Retrato_m%C3%A1s_can%C3%B3nico_de_Jos%C3%A9_de_San_Mart%C3%ADn.jpg>

José de San Martín, Argentine General and Liberator of Argentina (1816), Chile (1818), and Peru (1821) – Painted c. 1827-1829

Comparative Development. During the 19th and 20th centuries, most Latin American countries adopted three distinct phases of economic strategy. The first phase – primary-commodity, export-led growth – occurred from independence (around 1820) until the Great Depression (about 1930). Countries exported raw materials that were

competitive on world markets. Brazil had great success because of coffee exports. During the 19th century, Brazil supplied three-fourths of world coffee demand and coffee provided 60 percent of Brazilian export earnings. Argentina exported grains and livestock products (led by wheat, beef, and wool) to become one of the world's ten richest countries by 1914.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Coffee_Berries.jpg>

*Coffee (Coffea arabica) Berries, Ready for Harvesting –
Brazil Was the World Leader in Coffee Production in the 19th century*

The second Latin American economic strategy was import-substituting industrialization. During the Great Depression, many

countries expanded industry by creating tariff walls against imports and providing subsidies. Brazil expanded industrial output and national income rapidly, especially in the 1970s. However, that approach led to high foreign debt and worsened income inequality. Policymakers in Peru attempted to emulate Brazil's example. But inconsistent policies and political instability led to failure and slow economic growth.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Inti_Raymi.jpg>

*The Sun God Was Not Always Kind To Peru –
Inti Raymi, Festival to Worship the Sun, Saksaywaman, Cuzco*

The third economic strategy, adopted since about 1980, is industrial export-led growth. Latin American countries returned to

market-oriented policies, but promoted non-traditional exports, especially manufactures. International shocks (oil price rises and debt crises) and high domestic inflation forced Brazil to enact radical reforms to open the economy. Growth was slow in the 1980s and 1990s but picked up in the 2000s. Mexico followed a similar approach after its debt crisis in 1982. Reforms and NAFTA led to modest economic gains in a challenging environment.



Source: Wikimedia Commons available at
<<https://commons.wikimedia.org/wiki/File:Maquiladora.JPG>>

*Maquiladora Assembly Plant, Tehuacán, Puebla State, Mexico –
Pictured in 2007*



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Brazil_map_en_2004.png>

Contemporary Brazil



Source: *Wikimedia Commons* available at
< <https://commons.wikimedia.org/wiki/File:Mx-map.png> >

Contemporary Mexico



Source: Wikimedia Commons available at
< https://commons.wikimedia.org/wiki/File:Peru-CIA_WFB_Map.png >

Contemporary Peru



Source: Wikimedia Commons available at
https://commons.wikimedia.org/wiki/File:Argentina-CIA_WFB_Map.png

Contemporary Argentina

The Eastern Caribbean (18th century-present)

Trends in the 18th century. The eastern Caribbean region contains the islands of the Lesser Antilles, which lie in a north-south arc – east of Puerto Rico and north of Venezuela. The northern portion of the arc is known as the Leeward Islands, including St. Kitts, Guadeloupe, and Dominica. The southern part, the Windward Islands, run from Martinique to Grenada and include Barbados as an outlier, 100 miles east of the arc. Most of the islands are volcanic in origin, although Barbados, Antigua, and Anguilla were formed from coral limestone.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Caribbean_general_map.png>

The Lesser Antilles – Leeward and Windward Islands

In the 18th century, most of the eastern Caribbean islands were British or French colonies. During the first half of the century, piracy was brought under control in the 1720s. The indigenous Carib people continued to rule in Dominica and St. Vincent. In the British Leeward Islands and Barbados, sugar and slavery expanded rapidly. St. Kitts, Nevis, Antigua, and Montserrat switched from tobacco and cotton to sugar, boomed with new settlement, and surpassed Barbados.



Source: Wikimedia Commons available at
<[https://commons.wikimedia.org/wiki/File:The_Mill_Yard -
Ten_Views_in_the_Island_of_Antigua_\(1823\),_plate_V_-_BL.jpg](https://commons.wikimedia.org/wiki/File:The_Mill_Yard_-_Ten_Views_in_the_Island_of_Antigua_(1823),_plate_V_-_BL.jpg)>

*Grinding Sugar Cane with a Windmill in Antigua – The Mill Yard,
Painting by William Clark, 1823, British Library, London*

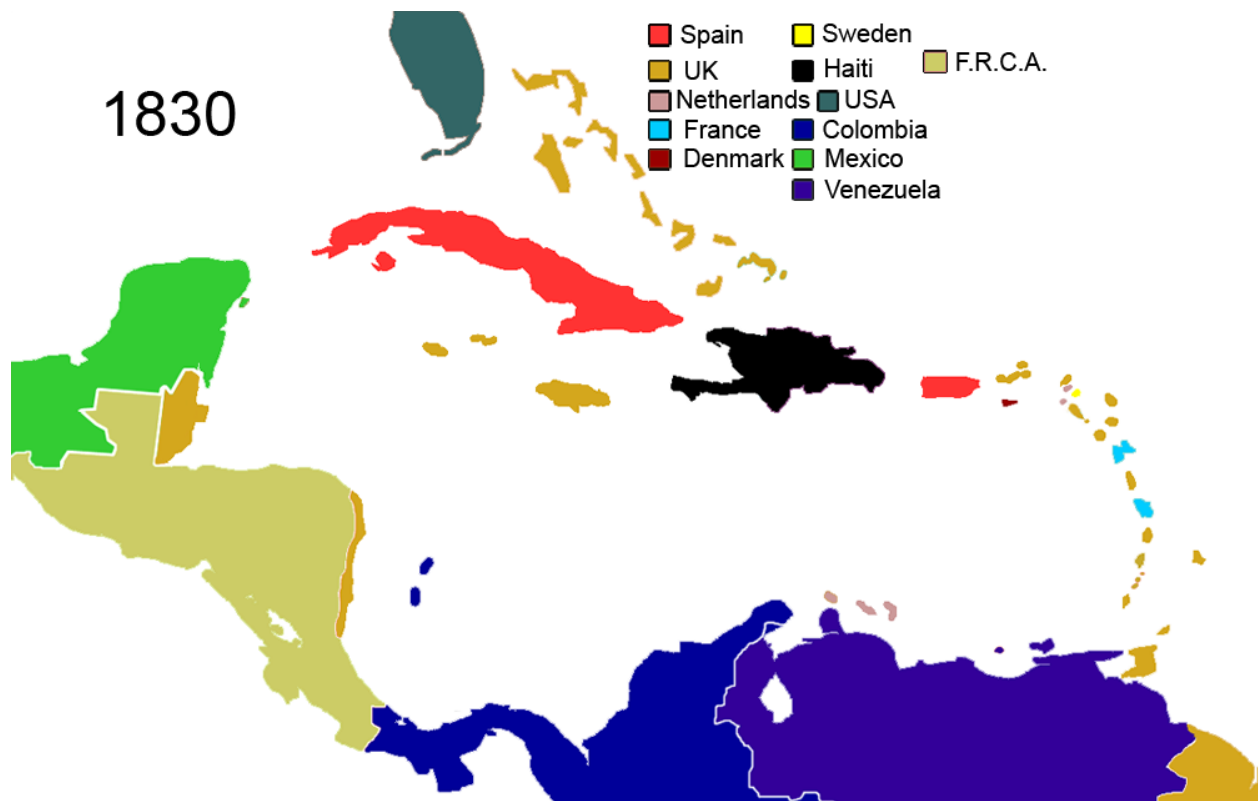
A sugar boom took place in Guadeloupe and Martinique, where French settlers expanded slave-based sugar plantations. During the second half of the 18th century, the boom was extended to Dominica, St. Vincent, and Grenada after Britain took control of those islands. The sugar islands of the eastern Caribbean had the world's most heavily slave-dominated population (90 percent) and the highest death rate of slaves (from overwork and undernutrition). In 1795, following large rebellions, the Black Caribs (African-Carib mulattos) controlled St. Vincent for six months and African slaves held Grenada for a year. The revolts strengthened the position of anti-slavery abolitionists in Britain.



Source: *Wikimedia Commons*, available at
<https://commons.wikimedia.org/wiki/File:The_Slave_Trade_by_Auguste_Francois_Biard.jpg>

The Slave Trade – Painting by Francois-Auguste Biard, c. 1833

Trends in the 19th century. The century between the end of the Napoleonic Wars and the close of World War I was marked by peace and stability in the eastern Caribbean region. The islands no longer were battlegrounds in wars between Britain and France. But stability did not bring democracy and prosperity. Instead, the 19th century saw greater European control and economic stagnation in the Lesser Antilles.



Source: Wikimedia Commons, available at
 <https://commons.wikimedia.org/wiki/File:Political_Evolution_of_Central_America_and_the_Caribbean_1830_na.png>

*Colonial Political Control in the Caribbean Region, 1830 –
 British (Dark Tan), French (Light Blue), and Spanish (Red)*

After British ships had carried 2.5 million slaves to the Caribbean, Britain banned the slave trade in 1808 and abolished slavery in British possessions in 1834. True emancipation occurred in 1838 when Britain ended the forced apprenticeship of former slaves in its colonies. France emancipated its slaves in 1848 and the Netherlands followed in 1863.

The end of slavery in the Caribbean led to a decline in sugar production

and a spate of worker protests by former slaves who demanded higher wages and lower land rents.



Source: Wikimedia Commons, available at
<[https://commons.wikimedia.org/wiki/File:Digging_the_Cane-holes -
_Ten_Views_in_the_Island_of_Antigua_\(1823\).plate_II_-_BL.jpg](https://commons.wikimedia.org/wiki/File:Digging_the_Cane-holes_-_Ten_Views_in_the_Island_of_Antigua_(1823).plate_II_-_BL.jpg)>

Slave-based Sugar Cane Production in British Antigua – Digging the Cane-holes, Painting by William Clark, 1823, British Library, London

All three European colonial powers responded by centralizing and tightening their political control. The British ended elected assemblies and introduced Crown Colony government in its Caribbean colonies (except Barbados, which retained its elected government). The French and Dutch integrated their colonies by including Caribbean

representatives in their governments and offering protected markets to Caribbean exports (especially sugar).



Source: Wikimedia Commons, available at
<<https://commons.wikimedia.org/wiki/File:Fort-Saint-Louis-06.jpg>>

*French Fort St. Louis –
Stands Guard over Fort-de-France, the Capital of Martinique*

All three European powers shifted their colonial attention from the Caribbean to newer colonies in Asia – British India, French Indochina, and the Dutch East Indies. That shift, plus the fall in the world price of sugar after 1840, led to economic stagnation in the eastern Caribbean. The British Caribbean colonies were hit hardest, after Britain adopted free trade in 1846 and stopped giving trade preferences to Caribbean sugar imports.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:British_Empire.svg>

The British Empire At Its Peak in 1921

Barbados. In the 1920s, Barbados remained heavily dependent on sugar cane, which occupied 80 percent of the colony's arable land and accounted for 95 percent of its export earnings. Because of that dependence, the Great Depression struck Barbados unusually hard. The world price of sugar fell by four-fifths, causing widespread poverty and unemployment in the island colony. Beginning in the 1930s, a pattern of political development in Barbados was imitated in several other British

Caribbean possessions. Rural and urban workers, suffering from the Depression, instigated strikes, organized a trade union (the Barbados Workers Union), and formed political parties, drawing their main support from the union.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Saint_Andrew,_Barbados_040.jpg>

Sugar Cane Field – Cherry Tree Hill, St. Andrew, Barbados

Barbados received its independence from Great Britain in 1966. For more than five decades, Barbados has enjoyed high political stability. Two parties with similar platforms, the Democratic Labor Party (1966-1976, 1986-1994, 2008-2018) and the Barbados Labor Party (1976-1986, 1994-2008, 2018-present), have alternated in power. Both

parties have formed accommodations with the Barbadian white elite, who constitute only three percent of the country's 287,000 people but own most of the country's land, corporations, and service organizations.

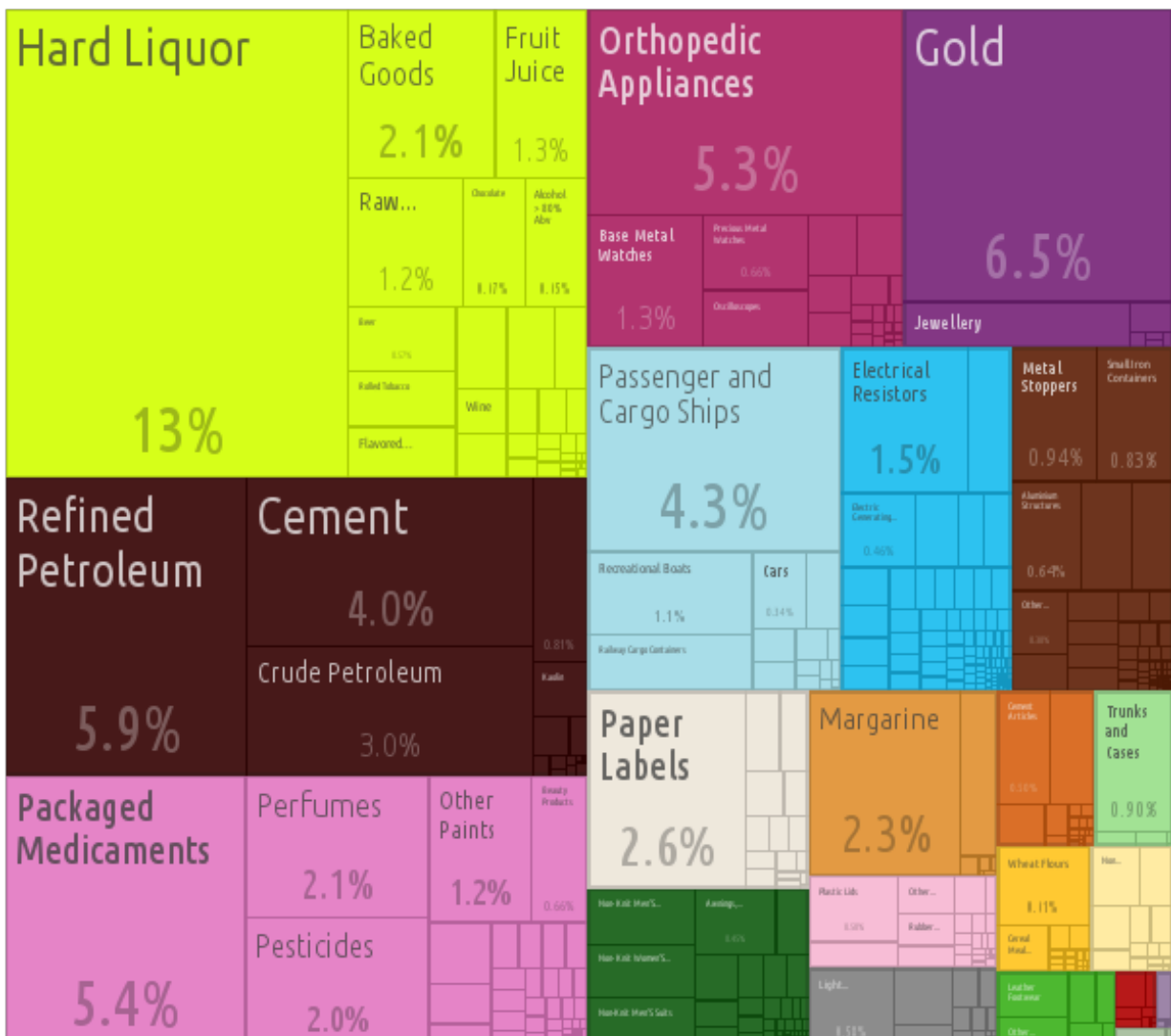


*Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Bridgetown_barbados_parliament_building.jpg>*

Parliament Building, Bridgetown, Barbados

Barbados has undergone an impressive economic transformation. Tourism (which generates more than 40 percent of national income), assembly manufacturing, and offshore banking have replaced sugar production (agriculture produces only 4 percent of national income). Barbados faces two main challenges that could impede further economic

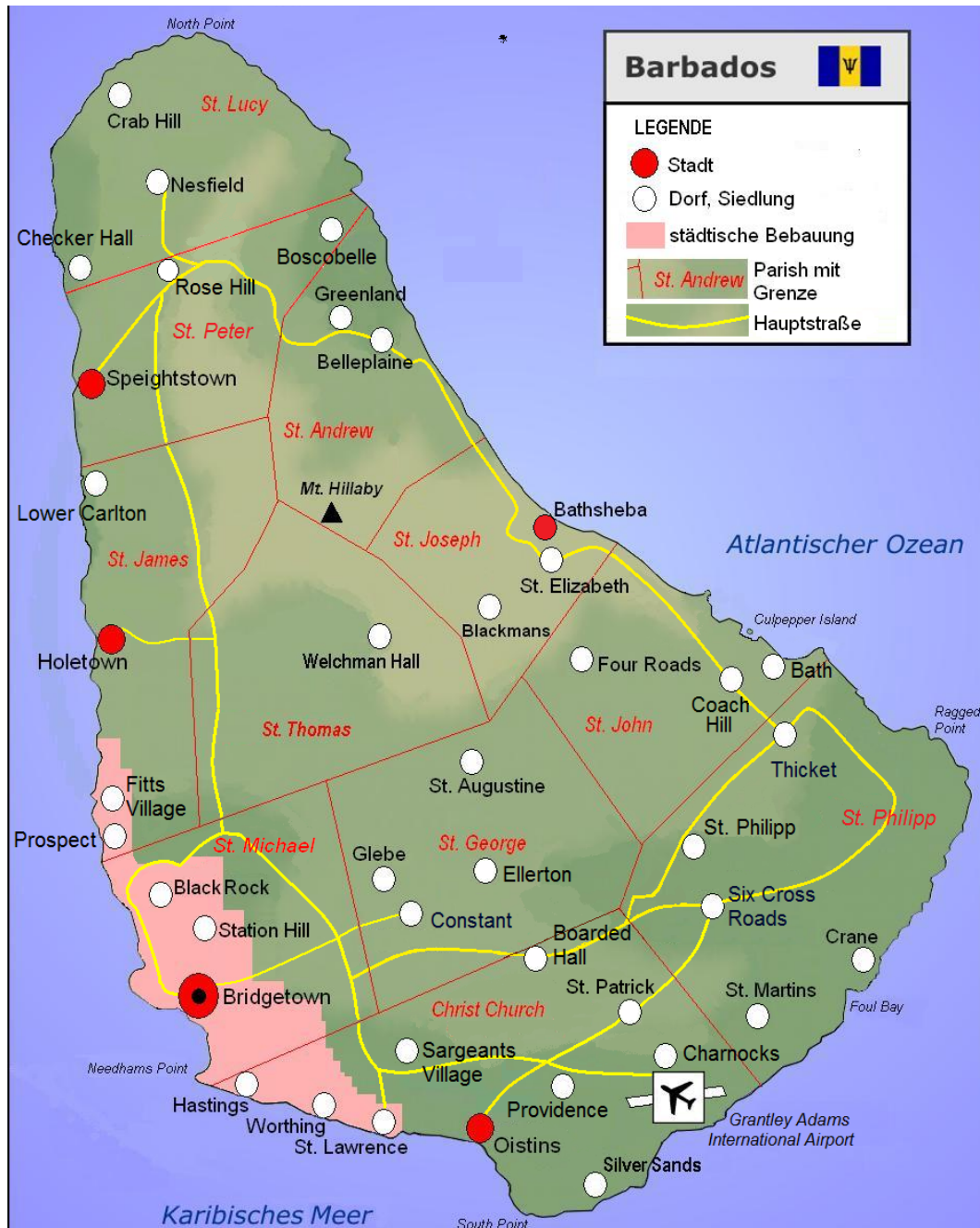
progress. Its leaders hope that the European Union will continue to provide special trade and aid programs for former colonies, and they need to improve their environmental protection practices to contain erosion of beaches, destruction of coral reefs, and deforestation.



Source: Wikimedia Commons available at
https://commons.wikimedia.org/wiki/File:Barbados_Exports_Treemap_2017.svg

Proportional Representation of Barbados's Export Earnings in 2017, Key Items Were Liquor, Gold, Medical Equipment, and Pharmaceuticals

In 2019, Barbados had a population of 287,000, and its annual rate of population growth was 0.1 percent. Life expectancy at birth was 79 years, and the rate of adult literacy was 99+ percent. Between 1992 and 2008, the annual rate of growth of Barbados's per capita income (measured by the World Bank at Purchasing Power Parity in constant 2017 dollars) was a modest 1.9 percent. Following the global recession of 2008, per capita income declined by 7.7 percent and in 2019 it was \$16,331, one-fourth of the American level. In 2019, Barbados ranked 59th of 189 countries in the UNDP's Human Development Index, a disappointing 128th of 190 countries in the World Bank's Ease of Doing Business index, and an impressive 30th of 198 countries in the Corruption Perceptions Index compiled by Transparency International.



Source: Wikimedia Commons available at
https://commons.wikimedia.org/wiki/File:Map_of_Barbados.png

Administrative Divisions of Contemporary Barbados

The French and Netherlands Antilles. The French and Dutch colonial territories in the eastern Caribbean region are linked politically

to France and the Netherlands and depend heavily on those affiliations. Guadeloupe and Martinique have been overseas departments of France since 1946, while St. Barthélemy and St. Martin became French overseas territorial collectivities in 2003. Those island territories are in the European Union and use the Euro as their currency. They receive about three-fourths of their incomes as transfers from France, and half of their citizens reside in France.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Gustavia_Harbor,_Saint-Barth%C3%A9lemy.jpg>

Yacht Harbor in Gustavia, Capital of St. Barthélemy, French Antilles

Guadeloupe and Martinique each have populations of about 400,000. Both have diversified away from dependence on sugar to earn income from tourism, bananas, and pineapples. The economic future of these French islands depends on continued aid from France and their ability to market agricultural products with EU trade preferences. The per capita incomes in these two French islands are estimated to be about \$28,000, among the highest in the eastern Caribbean region.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Martinique_Costumes.JPG>

*Tourists Are Attracted by Caribbean Culture and Beaches –
Dancers in Martinique in Traditional Carnival Dress*

The Netherlands Antilles – Aruba, Bonaire, and Curaçao (off the coast of Venezuela) and Saba, St. Eustatius, and St. Maarten (in the Leeward Islands) – are part of the Kingdom of the Netherlands, but they are not members of the European Union. The oldest Jewish settlement in the Western Hemisphere, dating from 1654, is in Willemstad, Curaçao, and the original Sephardic immigrants evolved a language, Papiamentu, based on Portuguese, Dutch, and African languages, still widely spoken in Curaçao. Three-fourths of the 198,000 Dutch Antilleans reside in Curaçao, and another 60,000 have emigrated to the Netherlands. The economy of the Dutch islands is based on oil refining, tourism, offshore banking, and generous Dutch aid. Their economic future depends on continuing a close political link with the Netherlands and receiving ample Dutch assistance.



Source: Wikimedia Commons available at
<<https://commons.wikimedia.org/wiki/File:Bulawayaya-1.jpg>>

*Bulawayaya Dance in Curaçao, Netherlands Antilles, 1950s –
Performed with Traditional Tambu Music*

The Organization of Eastern Caribbean States. A common pattern of political change emerged in the small Anglophone colonies of the Lesser Antilles. Trade unions sponsored political parties, and their charismatic leaders were re-elected for long periods of rule. In some islands the democratic process worked well. But in Antigua, V. C. Bird and his sons ruled for decades and produced stability, growth, and corrupt family wealth. In Grenada, Eric Gairy's long rule became

corrupt, and Maurice Bishop led a Marxist revolution to oust him in 1979. The revolution imploded in 1983, leading to an American military intervention to restore order.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Myris_fragr_Fr_080112-3294_ltn.jpg>

*Marxist Revolution in Grenada (1979-1983) – The War Was Not Fought
Over the Future of Nutmeg and Mace, a Leading Grenadian Export*

Britain wanted its Caribbean possessions to form a federation and become independent. The West Indies Federation was created in 1958, but dissolved in 1962 when Jamaica and Trinidad opted out. The Caribbean Community (CARICOM), formed in 1973, has had limited success in achieving economic integration. Twelve of CARICOM's

members belatedly formed a single market in 2006. The membership of CARICOM currently consists of all of the independent anglophone Antillean countries plus Belize, Guyana, and Montserrat.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:Government_House,_St._Lucia.jpg>

*Government House, Morne Fortune, Castries, St. Lucia, Built 1895 –
How Will the Small Countries Fare in CARICOM?*

Meanwhile, the Organization of Eastern Caribbean States (OECS) has been more successful. Six independent countries (Antigua and Barbuda, Dominica, Grenada, St. Kitts and Nevis, St. Lucia, and St. Vincent and the Grenadines) – all members of CARICOM – and one British dependency, Montserrat, formed the OECS in 1981. The OECS

countries have integrated their economies under a governing body made up of heads of state, established a central bank and a single currency, set up a common market, and created an exclusive fishing zone. In 2008, the OECS states began adjusting to a new regime of reciprocal trade agreements with the EU under the Cotonou Agreement, which are intended to continue preferential access for Caribbean products (bananas, sugar) in the EU market. The British Virgin Islands, Anguilla, Guadeloupe, and Martinique are associate members of the OECS.



Source: Wikimedia Commons available at
<https://commons.wikimedia.org/wiki/File:CIA_map_of_the_Caribbean.png>

The Contemporary Lesser Antilles in the Greater Caribbean Region

Time Line for Mexico and the Caribbean Region

- 15,000-11,000 BCE people from North Asia migrated into North and South America
- c. 7000 BCE people in Mexico began experimenting with agriculture
- c. 4000 BCE-100 CE Tiwanaku Kingdom in Peru – southern highland valleys – Tiwanaku, capital
- c. 2500 BCE people in Mexico developed a reliable system of food production – based on maize, beans, and squash
- c. 1200-200 BCE Olmec culture in Mexico – hieroglyphic writing, calendar, jade sculptures, pyramids
- 600 BCE-900 CE Zapotec Empire in Mexico – Oaxaca Valley – capital at Monte Albán – monumental architecture
- c. 400 BCE-650 CE Teotihuacán Empire in Mexico – northern Mexico to Guatemala – vast urban complex (12 square miles, 250,000 people)
- c. 100-700 CE Moche Kingdom in Peru – northwest coast – Cerro Blanco, capital
- c. 600-900 Maya Kingdom in southern Mexico and Guatemala – Tikal at Petén (six great pyramids, ten reservoirs, artificial lakes)
- c. 600-800 Huari Kingdom in Peru – northern highland valleys – Huari, capital

700-1470	Chimú Kingdom in Peru – northwest coast – Chan Chan, capital
10 th -12 th centuries	Toltec Empire in Mexico – capital at Tula – aggressive subjugation of neighbors – extensive rituals involving human sacrifice
14 th century	emergence of Inca Kingdom in Peru – initially a regional kingdom – capital, Cuzco
1376	Aztecs, immigrant mercenaries from northern Mexico, established a monarchy -- capital at Tenochtitlán, central Mexico
1428-1521	Aztec Empire in Mexico – 30 million people – Tenochtitlán, capital, 250,000 – efficient bureaucracy – militarism, tribute, sacrifice
1460s	Pachacuti Inca conquered Aymara kingdoms (Colla and Lupaqa) in the Titicaca Basin
1469	dynastic marriage of Isabella (of Castile-Léon) and Ferdinand (of Aragon-Catalonia)
1470	Topa Inca conquered Chimú and Ecuador
1479	formation of united kingdom of Spain – merger of Castile and Aragon
1492	Spain (Castile-Aragon) conquered Granada – last Islamic state in Iberia
1492	Christopher Columbus discovered New World (San Salvador Island, Bahamas) – for Spain

1493	Christopher and Bartholomé Columbus colonized Hispaniola
1498	Portuguese explorer Vasco da Gama sailed around Cape of Good Hope en route to India
c. 1500	2-3 million Amerindian people inhabited Brazil – Tupi people lived in the coastal regions – Tapuia people lived in the interior
1500	Pedro Álvares Cabral discovered Brazil for Portugal – by chance – en route to India
1503	<i>Casa de Contratacion</i> (House of Trade) set up in Seville to manage trade with America
1503-1660	16,000 tons of silver and 185 tons of gold shipped from Spanish America to Seville
1510s-1610s	Spain controlled the entire Spanish Main (the Caribbean basin)
1511	Spain colonized Cuba
1513	Vasco Nuñez de Balboa discovered the passage across the Isthmus of Panama
1516-1556	Habsburg King Charles V ruled Spain, Spanish America, Austria, Habsburg Europe
1519-1521	Hernan Cortés conquered Aztec Empire – horses, war dogs, cannons – widespread support from anti-Aztec Mexican peoples

1521	Hernan Cortés captured Tenochtitlán and took Emperor Moctezuma II hostage
1521-1821	Spain ruled Mexico
1521-c. 1620	indigenous population of Mexico fell from 25 million to 1 million – diseases, wars, exploitation, overwork
1525	Huayna Capac Inca (emperor) died – succession war between two sons – Atahualpa defeated Huascar (Cuzco)
1530s	Spain conquered Peru
1530-1533	Portugal began colonizing Brazil – led by Martim Afonso de Sousa – King João III distributed enormous land grants to colonists
1532	Francisco Pizarro began the Spanish conquest of the Incas – 260 conquistadors – captured Atahualpa Inca for ransom
1533	Pizarro murdered Atahualpa – after ransom was paid
1534	Sebastián de Benalcázar, Pizarro's lieutenant – defeated Incas, conquered Quito
1535-1821	Viceroyalty of New Spain – capital in Mexico City – governed all Spanish territory in North America, except Panama

1536	Pedro de Mendoza established a small camp. Buenos Aires – 1.5 million Amerindians inhabited Argentina, mostly Diaguita
1538-1821	Spain ruled Panama
1539	Manco Inca established Inca state in Vilcabamba – harassed Spanish colonists
1540s-1740s	Peruvian silver was transported across Panama (from Pacific to Caribbean) by mule caravans, loaded on Spanish convoy ships
1540s	Spanish colonists discovered hugely productive silver mines in Mexico
1555	France established France Antartique around Guanabara Bay, Brazil – rich source of brazilwood
1556-1598	Habsburg King Philip II ruled Spain, Spanish America, and the Netherlands
1565	Portuguese Governor-general Mem de Sá established Rio de Janeiro – drove the French out of Brazil in 1567
1572-1824	Spain ruled Peru
1571-1815	Manila Galleon Trade Route operated – Manila to Acapulco – annual convoy – Canton silk, porcelain traded for silver
1571	Patio Process introduced in Peru – used mercury to refine low-grade silver ore

1572	Spanish conquistadors defeated Inca forces – executed Túpac Amaru Inca (emperor) – ended Inca resistance to Spanish rule
1572-1824	Spain ruled Peru
1580	Spanish colonists established permanent base in Buenos Aires – site of Mendoza’s abandoned camp
1620s-1690s	Dutch merchant ships controlled the Caribbean trade
1630-1654	The Netherlands occupied sugar-rich Pernambuco Province in northeast Brazil – learned system of slave-based sugar planting
1650s-1700s	Barbados was Britain’s richest colony – slave-based sugar exports
1651	British Navigation Act created monopoly for British merchants
1654	oldest Jewish settlement in the Western Hemisphere began – in Willemstad, Curaçao
1655	Britain took Jamaica from Spain
1697	France took western third of Hispaniola (Saint Domingue, now Haiti) from Spain
1700-1789	Saint Domingue was the richest colony in the world – produced 40 percent of the world’s sugar and half of the world’s coffee

1716-1726	Woodes Rogers, Governor of Bahamas, and Royal Navy ended piracy in the Caribbean
1731	coffee exports from Brazil began – coffee accounted for half of Brazil's total exports by 1850, two-thirds by 1889
1776	Spain established the Viceroyalty of the Rio de la Plata, headquartered in Buenos Aires – included Upper Peru (and Potosí silver)
1793-1815	Napoleonic Wars – Britain and allies defeated France
1795	anti-colonial rebellions – Black Carib mulattos controlled St. Vincent for 6 months – African slaves held Grenada for a year
late 18 th century	population of New Spain was 4.5 million – 3.5 million Amerindians, 1 million criollos (born in New Spain of Spanish descent), and 15,000 peninsulares (born in Spain)
1806-1807	British forces occupied Buenos Aires
1807	Napoleon invaded Portugal – British Navy moved the Portuguese court to Brazil
1808-1814	Peninsular War – France, led by Napoleon Bonaparte, conquered and ruled Spain
1808	Napoleon deposed King Ferdinand VII of Spain – Viceroy José de Abascal in Peru remained loyal to the king

1810-1821	War for Mexican Independence – Colonel Agustín de Iturbide led revolutionary forces to victory
1815	Brazil was elevated to the status of a kingdom – the equal of Portugal
1816	Argentina declared its independence from Spain – established the independent United Provinces of the River Plate
1821	Mexico declared its independence from Spain
1821	Portuguese King, João VI, returned to Lisbon – due to political turmoil in Portugal – his son, Prince Pedro, ruled Brazil
1821-1822	Agustín de Iturbide, President of Mexico
1822-1823	Agustín de Iturbide, Emperor of Mexico – executed in 1824
1822	Brazil declared its independence from Portugal – Emperor Pedro I was first ruler – José Bonifácio was a leading nationalist
1822-1831	First Empire in Brazil – Emperor Pedro I ruled
1824	new constitution enacted in Brazil – strong, centralized monarchy – effective institutions – subservient military – regional autonomy

1824	Battle of Ayacucho – General Antonio de Sucre (with troops from Simón Bolívar’s Colombia) defeated Peruvian loyalists
1824	Peru declared its independence from Spain
1825	Cisplatine Province (Uruguay) seceded from Brazil – joined Argentina – became independent in 1828
1829-1852	Juan Manuel de Rosas governed Argentina – oversaw export boom in cattle products
1831	Emperor Pedro I abdicated in Brazil – departed for Portugal – ended First Empire – Pedro, his son, became Prince Regent
1831-1840	Regency in Brazil – Pedro, Prince Regent
1835	American settlers in Texas seceded from Mexico and declared formation of the independent Lone Star State
1836	Battle of the Alamo – Mexico, led by General Antonio de Santa Anna, defeated the Texan Republic (Lone Star State)
1838	Britain fully emancipated its slaves – ended the forced apprenticeship of former slaves in its colonies
1840-1889	Second Empire in Brazil – Emperor Pedro II ruled
1845	United States annexed the Texan Republic

1846	UK adopted free trade and stopped giving trade preferences to Caribbean sugar imports
1846-1848	Mexican-American War – US forces invaded Mexico on a pretext – captured Mexico City in 1847 – won the war
1848	Treaty of Guadeloupe Hidalgo – US paid Mexico \$18.25 million for the Mexican Cession (California, Nevada, Utah, and parts of Arizona, New Mexico, and Colorado)
1848	France emancipated all slaves in its colonies
1857-1872	Benito Juárez, President of Mexico – forced to default on foreign debt payments
1863	Netherlands emancipated all slaves in its colonies
1864-1867	Maximilian I, Emperor of Mexico – Installed by Emperor Napoleon III of France – supported by French troops
1865-1870	War of the Triple Alliance (Paraguayan War) – Brazil, Argentina, and Uruguay defeated Paraguay – Brazil and Argentina gained land from Paraguay
1876-1911	Porfirio Díaz, President of Mexico – brutal dictator, strong reformer – suppressed opposition, stabilized economy, modernized
1879-1884	War of the Pacific – Chile defeated Peru and Bolivia – gained nitrate-rich Antofagasta from Bolivia and Tarapacá, Arica, and Tacna (until 1929) from Peru

1888	slavery abolished in Brazil – caused anti-monarchist opposition – spurred European immigration
1889-1930	Ole Republic in Brazil – decentralized oligarchy – presidency rotated between São Paulo and Minas Gerais
1911-1920	Mexican Revolution – Emiliano Zapata (south) fought for land reform – Pancho Villa (north) supported new constitution – 2 million Mexicans died
1914	Panama Canal opened on August 15, 1914
1914-1918	World War I – Britain, France, Russia, Italy, Portugal, US defeated Germany, Austria-Hungary, Ottoman Empire
1920-1924	Álvaro Obregón, President of Mexico – suppressed violence – began land reform
1929	Peru officially ceded Tarapacá and Arica to Chile and received Tacna back as well as a \$6 million indemnity from Chile
1930-1945	New Republic in Brazil – Getúlio Vargas, leader – national capitalism – unionized workers – industrial elite – social legislation
1934-1940	Lázaro Cárdenas, President of Mexico – redistributed 49 million acres of land – nationalized oil industry – formed PEMEX

1939-1945	World War II – Allies (Britain, France, US, USSR) defeated Axis (Germany, Italy, Japan, Finland)
1946-1955	Juan Domingo Perón, President of Argentina – protected industry, taxed agriculture, subsidized urban workers –stagnation
1946	Guadeloupe and Martinique became overseas departments of France
1958-1962	West Indies Federation – political union of 14 newly independent island-states – former British colonies in the Caribbean region
1964-1985	military dictatorship in Brazil – authoritarian repression, imprisonments, censorship
1966	Barbados received its independence from Great Britain
1973	creation of the Caribbean Community (CARICOM) – 15 states and dependencies – promotes economic integration, cooperation
1976-1982	José López Portillo, President of Mexico – expanded government's role in the economy
1981	formation of the Organization of Eastern Caribbean States – Antigua and Barbuda, Dominica, Grenada, St. Kitts and Nevis, St. Lucia, and St. Vincent and the Grenadines, Montserrat – integrated their economies

1982	South Atlantic War (Argentine invasion of Falkland Islands) – UK (Margaret Thatcher) defeated Argentina (Leopoldo Galtieri)
1983	US (with 6 Caribbean countries) invasion of Grenada – to restore democratic government
1988-1994	Carlos Salinas, President of Mexico – privatized industries and rural land – strengthening US ties through NAFTA
1994-2000	Ernesto Zedillo, President of Mexico – continued market reforms and political liberalization
2000-2006	Vicente Fox, President of Mexico – improved relations with US – stabilized the Mexican economy
2003	St. Barthélemy and St. Martin became French overseas territorial collectivities
2006-2012	Felipe Calderón, President of Mexico – reformed Mexico's judicial system – regained stability after 2008-2009 recession
2006	12 CARICOM members belatedly formed a single market
2012-2018	Enrique Peña Nieto, President of Mexico – controversial, unpopular – tried to liberalize energy – faced allegations of corruption
2018-present	Andrés Manuel López Obrador, President of Mexico – populist – campaigned to fight corruption and control government spending

2020	Argentina ranked 46 th of 189 countries in the UNDP's Human Development Index
2020	Barbados ranked 58 th of 189 countries in the UNDP's Human Development Index
2020	Mexico ranked 74 th of 189 countries in the UNDP's Human Development Index
2020	Peru ranked 79 th of 189 countries in the UNDP's Human Development Index
2020	Brazil ranked 84 th of 189 countries in the UNDP's Human Development Index

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Sites Visited in the Caribbean Region

A Cruise in the Caribbean, Aboard the *Silver Cloud*

Silversea Cruise Line

March 12-31, 2012

Ship-based, Aboard the *Silver Cloud*

Spanish Town, Virgin Gorda, British Virgin Islands, United Kingdom

In 1493, Christopher Columbus sailed 60 miles east of Puerto Rico and discovered the Virgin Islands. He named one small island, Virgin Gorda (fat virgin) – possibly because the mountain and rock formations resembled a woman lying on her side. The British have governed 50 square miles of the archipelago as the British Virgin Islands (the BVI) since 1666. The larger portion, 136 square miles, was a Danish colony between 1754 and 1917, when the U.S. purchased it for \$25 million. Today, the BVI is an overseas territory of the United Kingdom with a population of 31,000. About 5,000 people live on the 9 square miles of arid Virgin Gorda (annual rainfall is only 16 inches).

The agents of Silver Shore, the shore excursion division of Silversea Cruises, invited me to serve as the ship's escort for numerous excursions and asked Sandra to take photographs for the *Silver Cloud*'s journal. We joined a lively introductory morning-visit to Virgin Gorda. Our group of 33 circled the island aboard two open-air safari buses. We stopped often to take photos of the spectacular scenery, notably at Gorda Peak (1400-foot elevation) where we had a panoramic view of many of BVI's 60 islands. We stopped for a mandatory rum punch. The highpoint was The Baths – unusual giant boulders formed along a beach by an erosion process known as "woolsack weathering."

Marigot, St. Martin, France and Philipsburg, St. Maarten, The Netherlands

In 1648, France and the Netherlands together drove Spain out of St. Martin – the most northerly island in the Lesser Antilles chain in the eastern Caribbean and an important source of salt. The French and Dutch then divided the island – 21 square miles in the north became French St. Martin and 16 square miles in the south became Dutch St. Maarten. That division has continued to the present. St. Maarten has 48,000 residents and (since 2010) is an independent nation within the Kingdom of the Netherlands with its capital at Philipsburg, whereas St. Martin has 30,000 residents and (since 2003) is a division of France (a French overseas collectivity) with its capital at Marigot.

Sandra and I escorted separate ship tours of St. Martin/St. Maarten. Mine was an excellent introduction to the wealthy little island, which is reputed to have one of the highest per capita incomes in the Caribbean. In a circular bus tour, we drove from Marigot to the center of the island, near Pic Paradis – the island's highest point (1500 feet) – to observe the scenic yacht harbors and surrounding islands. We spent an hour in Philipsburg, which claims to be the shopping capital of the eastern Caribbean. Front and Back Streets each contain over a mile of mostly upscale shops – along a spit of land that separates a former salt-evaporation pond from a stunningly-clean, white-sand beach

St. John's, Antigua, Antigua and Barbuda

The two-island country, Antigua and Barbuda, is a tiny member of the British Commonwealth with a population of about 90,000. Only 3500 people live on the flat, 68-square-mile island of Barbuda. The remainder live on Antigua, the larger island with 108 square miles, and about 40,000 of them reside in St. John's, the colorful, crowded capital town. After Spain abandoned the eastern Caribbean islands, Britain occupied Antigua in 1666 and, by the 18th century, planted 70 percent of the island in slave-based sugar cane. Antigua and Barbuda gained independence in 1981. V.C. Bird and his son, Lester, ran the country until 2004, when voters tossed out the corrupt and very wealthy dynasty.

Our group tour went to the southern part of Antigua to visit Nelson's Dockyard National Park. In the 18th century, Britain constructed a dockyard to refurbish ships in a hurricane-protected harbor. Horatio Nelson served there (1784-1787) to enforce Britain's ban on trade with the new United States of America, and later the dockyard was named for him. Britain abandoned the facility in 1889, following the advent of steam ships. We visited several British forts that protected the dockyard, notably Shirley Heights Lookout. We also watched an informative video on the colonial history of Antigua. Today, Nelson's Dockyard is a popular tourist destination and a harbor for posh yachts.

Castries, St. Lucia

Our first stop in the Windward Islands of the Lesser Antilles was St. Lucia, reputedly the lushest of the Caribbean islands. Parts of the interior of this volcanic island receive 160 inches of rainfall annually, while the coastal regions get about 60 inches each year. For two centuries, the French and the British fought over and exchanged St. Lucia 14 times, before Britain took control in 1814 (following the Napoleonic Wars). St. Lucia formerly produced slave-based sugarcane. Today, the island's 170,000 residents rely on tourism and agriculture (mainly bananas sold in the protected EU market). Their income per person, about \$13,000, is one of the lowest in the eastern Caribbean region.

Sandra and I escorted a varied tour in the western part of the island – near Castries, the capital. We began with a visit to St. Mark's, a colonial home of a shipping magnate's family, featuring original furnishings. We moved on to Caribelle Batik to see a demonstration of batik-dyeing, where the artisans applied the wax by hand or with copper blocks. We drove through the lush rainforest to have a view of Marigot Bay, the site of many films, which some argue has the finest scenery in the Caribbean. We capped off our introductory tour with an informative

demonstration of rum-manufacturing (using molasses imported from Guyana) and a delightful rum-tasting at St. Lucia Distilleries.

Bequia, The Grenadines, St. Vincent and The Grenadines

Bequia is a tiny (7-square-mile and 6000-person) island in the Grenadines, an archipelago of 32 islands (seven inhabited) that is part of the British Commonwealth country, St. Vincent and the Grenadines – population 104,000, located 13 degrees North Latitude in the southern Windward Islands between St. Lucia and Grenada. Bequia and the other Grenadines are heavily dependent on tourism and subsistence agriculture, whereas St. Vincent relies on tourism and banana exports. Britain took these islands from France in 1763, suppressed a six-month revolt led by Black Caribs (mulattos of Carib Amerindians and African slaves) in 1795, and grew sugarcane wherever possible.

Admiralty Bay is a stunning harbor, popular with yachters. The *Silver Cloud* anchored in the Bay for a day. Sandra and I escorted a scenic-island tour, which provided a nice introduction to the history of Bequia (pronounced beck-way). We drove in open, safari buses to visit the island's highlights. The British built Fort Hamilton to protect the island (from the French) and later named it for Alexander Hamilton (who was born in Nevis in the Leewards). After sampling a refreshing local beer (or rum punch) at a beautiful beach, we drove to the Old Hegg Turtle Sanctuary, where over 900 endangered Hawkesbill turtles have been raised to age five and then reintroduced into the ocean.

St. George's, Grenada

The *Silver Cloud* cruised southward to Grenada, the southernmost island in the Lesser Antilles. Grenada, an independent country with 110,000 residents and 133 square miles, is renowned for two things – spices and “the intervention.” Before hurricane Ivan devastated the island in 2004, Grenada was the world's second ranked exporter of nutmeg and mace (after Indonesia) and produced about one-third of global production of

those spices (which come from the same tree). The intervention occurred in October 1983, when 6,000 American marines and army rangers invaded Grenada to oust an unpopular Marxist government that was aligned with Cuba and the Soviet Union.

Sandra and I led an eight-hour, circular tour of the lush volcanic island. We drove northward along the west (Caribbean) coast to observe cocoa production at the Dougaldston Estate and nutmeg and mace processing at the Gouyave Cooperative Factory. At the northern tip of the 21-mile-long island, we visited “Carib Leap,” a cliff where historians claim that Carib Amerindians committed suicide rather than submit to French rule, and the River Antoine Rum Distillery, which operates on 1785 machinery. We had a splendid Creole lunch at the historic Belmont Estate and drove through deep, high rainforest in Grand Etang National Park en route back to St. George’s, the capital.

Bridgetown, Barbados

Bridgetown, Barbados was the last port of call on our first cruise. Barbados is remarkable. It was Britain’s richest colony in the 17th century, producing sugar cane on slave-based plantations. British planters first settled Barbados in 1627, and the flat, coral island of 166 square miles was a British possession until Barbados became an independent nation within the Commonwealth in 1966. Today, the island republic of 290,000 people ranks at the top of the UN Human Development Index for countries in the Caribbean and Latin America. Barbados’s diversified economy depends on tourism, assembly manufacturing, and offshore banking as well as sugar cane production.

I escorted a ship’s tour of the island which started and ended in Bridgetown in the southwest corner of Barbados and included three stops in the central and eastern parts of the 22-by-14-mile little island. Gun Hill Signal Station was constructed in 1818 as one of six communication points, which used semaphore signals to warn of slave revolts (one had occurred in 1816) or foreign invasions (none were

attempted). St. John's Parish Church is an impressive Anglican church, constructed in the 19th century, with stunning Atlantic coastal views in two directions – east and south. The Andromeda Gardens house a large collection of botanical specimens, indigenous and exotic, with clear explanations.

Roseau, Dominica

Dominica, an English- and French-Patois-speaking member of the British Commonwealth, lies between the two largest French Caribbean islands – Martinique (to the south) and Guadeloupe (to the north). Dominica is relatively large in size (305 square miles) and small in population (73,000 residents). The volcanic island is the last domicile of Carib Amerindians; about 3500 people in northeastern Dominica identify themselves as Carib and 1500 of them claim pure Carib ancestry. First settled by the French in 1720, Dominica was taken over by Britain in 1763, reclaimed by France in 1778, and claimed again by Britain in 1784. The tiny island country became independent in 1978.

Sandra and I walked around Roseau – with 21,000 inhabitants, the country's capital – for a couple of morning hours and then escorted a 90-minute tour by trolley train around Roseau in the afternoon. Since we were in port on a Saturday, we enjoyed the extensive, colorful, and noisy weekly-food-market in Roseau. We searched the town in vain for tightly hand-woven Carib basketry. Sadly, Dominica's museum is closed on Saturdays. Our energetic guide on the trolley train introduced us to many of the 500 species of plants in the Botanic Gardens, led us through the Catholic Cathedral (begun in 1730), and took us to the Fort Young Hotel for a refreshing taste of local rum punch.

Gustavia, St. Barthélemy, France

St. Barthélemy, known colloquially as St. Barts, was the smallest (8 square miles and 9,000 people) and richest (its per capita income is unreported but believed to exceed \$40,000) of the islands we visited.

France colonized St. Barts in 1648, gave the island to Sweden in 1784 in exchange for trading rights in Goteborg, and purchased it back in 1888. Few slaves were ever brought onto the rugged, volcanic island. Instead, hardy descendants of French peasant settlers eked out an existence by farming, fishing, and working off-island. Today, St. Barts is a center of up-scale tourism – catering to the super-rich with luxurious yacht harbors, villas, hotels, restaurants, and pricey stores.

Our entry by tender boat into Gustavia port (named for Sweden's King Gustav III) was impressive. Forty-seven huge yachts had completed a three-day regatta the previous day and were sailing away. Sandra and I escorted an informative hour-long, around-island introduction to St. Barts by minibus-taxis. The island is stunningly beautiful and remarkably diverse. White-sand beaches contrast with breaking waves and deep-blue water, whereas the vegetation on land is semi-desertic, reflecting the sparse rainfall and lack of rivers and springs. One picturesque beach in Gustavia consists almost entirely of tiny seashells. St. Barts is a haven for those without tight budget constraints.

Basseterre, St. Kitts, St. Kitts and Nevis

St. Kitts – named St. Christopher by Christopher Columbus – is an historical little island with fewer than 50,000 people inhabiting its 68 square miles. In 1623, the British established their first Caribbean settlement on St. Kitts, and the French followed two years later. The two imperial powers shared St. Kitts until Britain took full control in 1713. France, an ally of the American rebels, retaliated during the Revolutionary War and captured the sugar-rich island for a year, but Britain regained control in 1783. Along with its small neighboring island, Nevis, St. Kitts gained independence in 1983 as the republic of St. Kitts and Nevis within the British Commonwealth.

The *Silver Cloud* spent only five hours in St. Kitts. Sandra and I escorted a delightful tour of the island with a dozen passengers. The driver-guide was an amazing 76-year-old great-grandfather who quoted

the page number from his beloved history book whenever he gave a name or date. We saw the former slave market in Basseterre, the capital, visited the Wingfield Estate, the oldest English settlement in the Caribbean, and toured the remarkable Romney Manor, which was started in 1626 by Sam Jefferson, a direct ancestor of Thomas Jefferson. The highlight of the tour was the fabulous Brimstone Hill Fortress, a UNESCO World Heritage site, built by Britain in 1696.

Road Town, Tortola, British Virgin Islands, United Kingdom

Tortola (meaning turtle dove) is the largest of the British Virgin Islands (with just 25 square miles) and houses 23,000 of the BVI's 31,000 inhabitants. It is volcanic, craggy, and beautiful. Road Town, with 8,000 residents, is the capital of the BVI, and it gives the appearance of being much larger because it is a hub for huge cruise ships and BVI's booming tourism industry. With a per capita income in excess of \$40,000, the BVI is by far the richest of the Anglophone Eastern Caribbean island groups. Alongside tourism, the BVI gains much wealth from offshore banking because it provides tax breaks with convenience and privacy to legitimate overseas financial institutions and investors.

Sandra and I spent a very enjoyable morning, escorting a ship tour of Tortola by sea and land. Along with 26 guests, we took a motor launch from the harbor in Road Town, motored by many of the smaller British Virgin Islands, and disembarked in colorful Soper's Hole Marina at the southwest end of Tortola. After a shopping interlude, we boarded two open-air safari buses for a land tour along the northern and central parts of the island. The views were breath-taking, especially those overlooking Cane Garden Beach, the most popular sunning spot in the BVI. We snaked our way up the spine of Tortola, near the top of Sage Mountain – at 1716 feet the highest elevation in the BVI.

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A Cruise in South America and the Caribbean

Silversea Cruises

February 6 - March 1, 2008

Ship-based, Aboard the *Silver Wind*

Devil's Island, French Guiana

After two days at sea, we arrived at Devil's Island, French Guiana, on the northern coast of South America. French Guiana today is an overseas department of France, not an independent country, with only 100,000 residents. Devil's Island was one of the world's toughest penal institutions between 1852 and 1954, when France sent 67,000 convicts to Guiana. France was attempting to emulate Britain's Australian experience by sending convicts to colonize Guiana. Only a handful of lifers managed to escape from notorious Devil's Island. We visited the ruins of the prison buildings, many restored, in the lush, coconut-palm-covered tropical island off French Guiana's coast.

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South America Expedition By Private Jet

TCS Expeditions

February 19-March 11, 2002

Airplane-based

Tikal, Guatemala

Tikal's moment in history is quite easy to identify. This central Mayan capital city rose to its peak of wealth, power, and monument construction during the reigns of two remarkable kings, father and son, whose names translate awkwardly into English as Eternal Standard Bearer and Darkness of the Night. Mayan wealth was derived mostly from agriculture (corn, beans, squash, cacao) and foreign trade, especially with kingdoms in Mexico. Mayan creativity – in agricultural experimentation, architecture and art, astronomy and mathematics, and

hieroglyphic writing – overcame the brutalities of human sacrifice and caste-based autocracy. In the 8th century, Tikal and surrounding Mayan city-states had reached a level of technical sophistication and political organization that was matched in only a few other parts of the contemporary world – Tang China, Abbasid Baghdad, and Toltec Mexico. However, by the end of the 9th century, the Mayan civilization crashed and the templed city of Tikal was abandoned because of a combination of resource mismanagement (deforestation leading to soil erosion), prolonged and severe droughts, debilitating wars with rival Mayan city-states, and increasing exploitation of the Mayan common people by the desperate ruling class.

Today Tikal is a protected heritage site in a national park. The temples and acropolises are mostly visible through the all-consuming rain forest, but archaeologists estimate that only about ten percent of the Mayan ruins in Tikal have been investigated so far. Hardy tourists can climb some of the temples, including the tallest one (Temple IV) that rises abruptly to a height of 225 feet. All major buildings in Tikal were laid out by triangulation according to a careful plan based on astronomical and calendrical events. The city site is enormous. Tourists are treated to tropical bird- and game-watching (monkeys and coatimundis) as they walk from one temple to another. It is amazing to be able to observe much of what the Mayans of Tikal were able to create more than twelve centuries ago. Some representations of Mayan art and architecture have been preserved for display in two worthwhile museums in Tikal.

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