



This material is designed to help you think about large historical topics in a manageable and meaningful way and to connect the content to the California standards.

Why did industrialized nations embark on imperial ventures?

In Lesson 1 you will read that industrial nations embarked on imperialist ventures to acquire the raw materials needed to mass-produce goods and open new markets to sell those goods. Colonizers also justified their conquests by their belief in their racial and cultural supremacy—that their “civilized” societies were superior to the “backward” societies they conquered. Imperialists felt their actions were supported by Social Darwinism, a philosophy that applied Charles Darwin’s theories of evolution and natural selection to human society.

Industrial nations also saw overseas expansion as a way to strengthen their own global strategic positions. The development of more advanced firearms (Maxim gun), transportation (railroad, steam engine), and communication methods (telephone, telegraph) enabled industrialized nations to pursue imperialist policies.

How did colonization work?

Imperialist nations controlled their subjects in a variety of ways. In Lesson 2 the Analyze Key Concepts chart shows the four forms of imperialism: colonies, protectorates, spheres of influence, and economic imperialism. Note that even businesses, like the Dole Fruit Company, engaged in imperialist practices. The chart also shows the two types of management methods—indirect control and direct control—used by imperial powers.

Industrial nations could produce goods cheaper than nations that engaged in traditional manual production. This led to what scholars call a kind of “informal empire.” Some countries were not formally colonized, but became increasingly dependent on industrial nations for mass-produced goods. Expansions of trade, investment, and finance allowed Britain, for example, to make countries that were not formally colonies—such as India initially, China, and certain younger Latin American states—economically dependent on Britain.

In Lesson 4 you will read how the British East India Company grew to govern directly and indirectly large areas of India and Bangladesh. Until the mid-1800s, the British government did not interfere with the company’s activities. By the late 1800s, Britain held much of the political and economic power in India, requiring India to produce raw materials for British industry and buy British goods. Infrastructure projects, like railroads, increased British control, enabling faster transport of goods. Christian missionary activity and racist attitudes of British officials influenced Indian religious practices and cultural

norms. On the positive side, the British introduced new medicines, educational systems, print technology, and railroads. Communications systems, such as telephone and telegraph lines, and rapid transportation systems aided the integration of regional Indian religious traditions and brought a unity that would later grow into nationalism.

How was imperialism connected with race and religion?

In Lessons 1 and 2 you will read how imperial rulers viewed the native races, cultures, and religions in their colonies as inferior and in need of improvement. Reading the literature of the time, such as Rudyard Kipling’s *The White Man’s Burden*, gives an idea of the Western world’s perspectives during the age of imperialism.

In Lesson 1 you will discover how racism was a pillar of imperialism and that many racist sentiments developed as a result of Social Darwinism. This philosophy applied Darwin’s theories of evolution, natural selection, and survival of the fittest to human societies, giving imperial powers a sense of cultural and national superiority. In Lesson 4 you will read how British racism toward their subjects in India fueled resistance movements, such as the Sepoy Mutiny.

In Lesson 1 you will also read that Christian missionaries believed that European rule was the best way to end the slave trade. Missionaries also sought to convert and “civilize” or “Westernize” the peoples conquered by imperialist nations. Missionary efforts in Asia, Africa, and the Pacific Islands created a further push for European nations to expand imperial influence. Lesson 2 describes how in some cases, missionary efforts could create unrest, resulting in religious-based resistance movements, like the Ashanti Wars and the Maji Maji Rebellion.

How did native people respond to colonization?

In each lesson you will find discussion about how native people responded to colonization. In Lesson 1 you will find information about native resistance to imperial control in South Africa, and Lesson 2 discusses resistance put up by other African peoples, in places like Algeria, Nigeria, and German East Africa. European nations controlled many Muslim lands by economic means and by creating spheres of influence. In Lesson 3 you will read about those activities and the attempts of some Muslim nations, such as Egypt, to modernize in an effort to resist European domination. Those attempts did not succeed. Lesson 5 describes how both economic influence (through the Dutch East India Company) and Dutch and British government interventions were used to conquer lands in Southeast Asia. Many Dutch migrated to the new colony of Indonesia to manage the large plantations. This

established a rigid social class system with the Dutch at the top and Indonesians occupying the lower tiers. In Malaysia, the British brought in Chinese workers to work the tin mines. Over time the Malays became a minority in their own country. The plantations and mines of the Southeast Asian colonies attracted migrant workers from across the world. The resulting mix of cultures and religions would lead to conflicts. Ultimately, only a few countries that were being pressured by Europeans, such as China, Thailand, Iran, and Ethiopia, retained their political independence.

In Lesson 2 you will read how the Emperor of Ethiopia, Menelik II, successfully played the imperialist nations against each other while stockpiling modern weapons. In the 1896 Battle of Adowa, his forces defeated the Italians.

Thailand, then called Siam, also successfully resisted European domination. In Lesson 5 you will read how the Siamese kings skillfully promoted Siam as a neutral zone between the competing imperial aspirations of Britain and France.

How was imperialism similar and different between colonies in Africa, Asia, and Latin America?

In Lesson 2 in the Analyze Key Concepts chart, you will find comparisons of the different imperialist strategies used in Africa, Asia, and Latin America. In Africa, imperialism usually took the form of colonies and protectorates. In Asia, the French took direct control of their Indochina colonies, while the Dutch governed through the Dutch East India company. In Hawaii and the Philippines, the United States used increasing economic and political pressure to influence those countries during the late 1800s. Even following independence, most Latin Americans worked for large landowners who were often American businessmen. In the early 1900s, the U.S. began to enforce the Monroe Doctrine and the Roosevelt Corollary in Latin America, first with regard to Cuba and then the building of the Panama Canal.

PRIMARY SOURCE

F. D. Lugard, *The Rise of Our East African Empire*

The following passage was written by Frederick Lugard, a British colonial administrator of high rank. It was published in 1893 during the height of the British Empire. After reading this quote, identify at least two justifications he cites in support of imperialism.

It is sufficient to reiterate here that, as long as our policy is one of free trade, we are compelled to seek new markets; for old ones are being closed to us by hostile tariffs, and our great dependencies, which

formerly were the consumers of our goods, are now becoming our commercial rivals. It is inherent in a great colonial and commercial empire like ours that we go forward or go backward. To allow other nations to develop new fields, and to refuse to do so ourselves, is to go backward; and this is the more deplorable, seeing that we have proved ourselves notably capable of dealing with native races and of developing new countries at a less expense than other nations. We owe to the instincts of colonial expansion of our ancestors those vast and noble dependencies which are our pride and the outlets of our trade today; and we are accountable to posterity that opportunities which now present themselves of extending the sphere of our industrial enterprise are not neglected, for the opportunities now offered will never recur again.

—F. D. Lugard, *The Rise of Our East African Empire*

ACTIVITY

Write an Essay on the Causes and Justifications for Colonization

Your task is to consider the interconnected causes and justifications for colonization, including religious, racial, and political uplift; economic exchange; and geopolitical power. Analyze these causes and justifications by comparing the perspectives of advocates for and against imperialism. Consider how each side presents evidence to support its claims.

- 1. Planning** Use the Internet to research credible primary sources reflecting the causes and justifications for colonization by different countries. Choose two contrasting views to analyze.
- 2. Analyzing the Primary Sources** Consider the following questions as you analyze the primary sources:
 - What were the specific justifications given for colonization? Were they economic, religious, racial, or political?
 - Examine the words. Is the language in the primary sources slanted or racist? Does it convey a superior attitude?Write a comparative essay about the primary sources:
 - Describe similarities and differences in terms of the causes and justifications of imperialism.
 - Note specific details that the sources include about the goal of imperialism.
- 3. Reviewing and Proofreading** Make sure that your essay is clear and specific. Check your essay for capitalization, spelling, punctuation, and grammar. Make sure your sources are credible and properly cited.

Module 9

The Age of Imperialism



Essential Question

What role did imperialism play in shaping the modern world?



About the Photo: In this photo, Europeans oversee the work of African migrant workers at a South African gold mine.

In this module, you will learn about the colonization by Western countries of large areas of Africa and Asia.

Explore ONLINE!



VIDEOS, including...

- The Spanish-American War: Birth of a Superpower
- In the Footsteps of Doctor Livingstone
- Ottoman Empire: The War Machine
- The Suez Canal
- The Conquest of Hawaii

- ✓ Document-Based Investigations
- ✓ Graphic Organizers
- ✓ Interactive Games
- ✓ Image Compare: Imperialism in Africa, 1878 and 1913
- ✓ Animation: How the Panama Canal Works



10.4.1 Describe the rise of industrial economies and their link to imperialism and colonialism (e.g., the role played by national security and strategic advantage; moral issues raised by the search for national hegemony, Social Darwinism, and the missionary impulse; material issues such as land, resources, and technology). **10.4.2** Discuss the locations of the colonial rule of such nations as England, France, Germany, Italy, Japan, the Netherlands, Russia, Spain, Portugal, and the United States. **10.4.3** Explain imperialism from the perspective of the colonizers and the colonized and the varied immediate and long-term responses by the people under colonial rule. **10.4.4** Describe the independence struggles of the colonized regions of the world, including the roles of leaders, such as Sun Yat-sen in China, and the roles of ideology and religion. **CST.1** Students compare the present with the past, evaluating the consequences of past events and decisions and determining the lessons that were learned. **CST.2** Students analyze how change happens at different rates at different times; understand that some aspects can change while others remain the same; and understand that change is complicated and affects not only technology and politics but also values and beliefs. **CST.3** Students use a variety of maps and documents to interpret human movement, including major patterns of domestic and international migration, changing environmental preferences and settlement patterns, the frictions that develop between population groups, and the diffusion of ideas, technological innovations, and goods. **HREP.2** Students identify bias and prejudice in historical interpretations. **HREP.4** Students construct and test hypotheses; collect, evaluate, and employ information from multiple primary and secondary sources; and apply it in oral and written presentations. **HI.1** Students show the connections, causal and otherwise, between particular historical events and larger social, economic, and political trends and developments. **HI.2** Students recognize the complexity of historical causes and effects, including the limitations on determining cause and effect. **HI.3** Students interpret past events and issues within the context in which an event unfolded rather than solely in terms of present-day norms and values.

Africa and Asia Events

World Events

1850

1850 European trading with Africa
✓ becomes well established.



1852 Napoleon III proclaims > himself emperor of France.



1869 Suez Canal opens.

1871 Bismarck completes unification of German Empire.

1884–1885 Berlin Conference sets rules for African colonization.

1898 The United States acquires Philippines and annexes Hawaii.



< 1899 Boer War begins in South Africa.

1898 The United States wins ^ Spanish-American war.



1910 Mexican Revolution begins.

1914 Most of Africa is under European control.

1914 World War I begins.

1914



The Roots of Imperialism

The Big Idea

Ignoring the claims of African ethnic groups, kingdoms, and city-states, Europeans established colonies.

Why It Matters Now

African nations continue to feel the effects of the colonial presence more than 100 years later.

Key Terms and People

imperialism
 racism
 Social Darwinism
 Berlin Conference
 Shaka
 Boer
 Boer War

Setting the Stage

Industrialization stirred ambitions in many European nations. They wanted more resources to fuel their industrial production. They competed for new markets for their goods. Many nations looked to Africa as a source of raw materials and as a market for industrial products. As a result, colonial powers seized vast areas of Africa during the 19th and early 20th centuries. This seizure of a country or territory by a stronger country is called **imperialism**. As occurred throughout most of Africa, stronger countries dominated the political, economic, and social life of the weaker countries.



This painting shows Great Britain's Edward, Prince of Wales, being greeted by Indian princes during an official visit to India in 1875.



10.4.1; 10.4.2; 10.4.3; CST.3; HREP.2;
 HREP.4; HI.1; HI.3

Africa Before European Domination

In the mid-1800s, on the eve of the European domination of Africa, African peoples were divided into hundreds of ethnic and linguistic groups. Most continued to follow traditional beliefs, while others converted to Islam or Christianity. These groups spoke more than 1,000 different languages. Politically, they ranged from large empires that united many ethnic groups to independent villages.

Europeans had established contacts with sub-Saharan Africans as early as the 1450s. However, powerful African armies were able to keep the Europeans out of most of Africa for 400 years. In fact, as late as 1880, Europeans controlled only 10 percent of the continent's land, mainly on the coast.

Furthermore, European travel into the interior on a large-scale basis was virtually impossible. Europeans could not navigate African rivers, which had many rapids, cataracts, and changing flows. The introduction of steam-powered riverboats in the early 1800s allowed Europeans to conduct major expeditions into the interior of Africa. Disease also discouraged European exploration.

Finally, Africans controlled their own trade networks and provided the trade items. These networks were specialized. The Chokwe, for example, collected ivory and beeswax in the Angolan highlands.

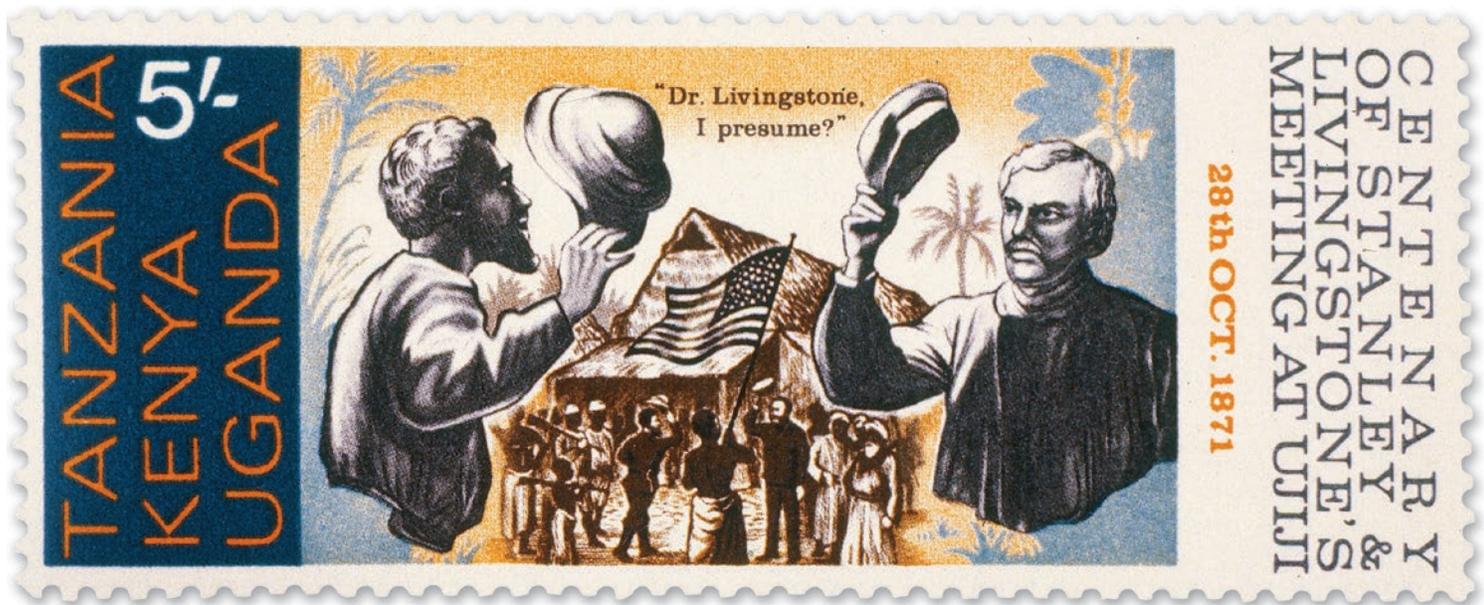
Africans had their own trade networks before the European invasion. One good, ivory, was often carved by artisans into pieces such as the one shown here.



Nations Compete for Overseas Empires Those Europeans who did penetrate the interior of Africa, which could be a challenging experience given its diverse terrain, climate, and cultures, were explorers, missionaries, or humanitarians who opposed the European and American slave trade. Europeans and Americans learned about Africa through travel books and newspapers. These publications competed for readers by hiring reporters to search the globe for stories of adventure, mystery, or excitement.

The Congo Sparks Interest In the late 1860s, David Livingstone, a missionary from Scotland who supported the rights and freedom of native peoples suppressed under European imperialism, traveled with a group of Africans deep into central Africa to promote Christianity. When several years passed with no word from him or his party, many people feared he was dead. An American newspaper hired reporter Henry Stanley to find Livingstone. In 1871, he found Dr. Livingstone on the shores of Lake Tanganyika. Stanley's famous greeting—"Dr. Livingstone, I presume?"—made headlines around the world.

Stanley set out to explore Africa himself and trace the course of the Congo River. His explorations sparked the interest of King Leopold II of Belgium, who commissioned Stanley to help him obtain land in the Congo. Between 1879 and 1882, Stanley signed treaties with local chiefs of the Congo River valley. The treaties gave King Leopold II of Belgium control of these lands.



This stamp celebrates the centenary (100th) anniversary of Stanley and Livingstone's meeting in 1871.

Reading Check

Evaluate Were King Leopold II's imperialistic intentions valid? Explain.

Leopold claimed that his primary motive in establishing the colony was to abolish the slave trade and promote Christianity. However, he licensed companies that brutally exploited Africans by forcing them to collect sap from rubber plants. At least 10 million Congolese died due to the abuses inflicted during Leopold's rule. As a result of his cruelty, humanitarians around the world demanded changes. In 1908, the Belgian government took control of the colony away from Leopold. The Belgian Congo, as the colony later became known, was 80 times larger than Belgium. The Belgian government's seizure of the Congo alarmed France. Earlier, in 1882, the French had approved a treaty that gave France the north bank of the Congo River. Soon Britain, Germany, Italy, Portugal, and Spain were also claiming parts of Africa.

Forces Driving Imperialism

The motives that drove colonization in Africa were also at work in other lands. Similar economic, political, and social forces accelerated the drive to take over land in all parts of the globe to assert power. The Industrial Revolution, in particular, provided European countries with a reason to add lands to their control. As European nations industrialized, they searched for new markets and raw materials to improve their economies.

Belief in European Superiority The race for colonies also grew out of a strong sense of national pride. Europeans viewed an empire as a measure of national greatness. As the competition for colonies intensified, each country was determined to plant its flag on as much of the world as possible.

Many Europeans believed that they were better than other peoples. The belief that one race is superior to others is called **racism**. The attitude was a reflection of **Social Darwinism**, a social theory of the time. In this theory, Charles Darwin's ideas about evolution and natural selection were

Rhodes on Imperialism

Cecil Rhodes was a successful businessman and a major supporter of British expansion. Rhodes chose for his burial site the Matoppos—or Matopo Hills—in present-day Zimbabwe (formerly Rhodesia), a colony Rhodes founded. In this excerpt, he clearly stated this position on British imperialism.

Analyze Historical Sources

What attitude about the British does Rhodes's statement display? Is the excerpt from *Confession of Faith* credible?

"I contend that we [Britons] are the first race in the world, and the more of the world we inhabit, the better it is for the human race... It is our duty to seize every opportunity of acquiring more territory and we should keep this one idea steadily before our eyes that more territory simply means more of the Anglo-Saxon race, more of the best, the most human, most honourable race the world possesses."

—Cecil Rhodes, *Confession of Faith*, 1877

applied to human society. Those who were fittest for survival enjoyed wealth and success and were considered superior to others. According to the theory, non-Europeans were considered to be on a lower scale of cultural and physical development because they had not made the scientific and technological progress that Europeans had. Europeans believed that they had the right and the duty to bring the results of their progress to other countries.

The push for expansion also came from missionaries who worked to convert the peoples of Asia, Africa, and the Pacific Islands to Christianity. Many missionaries believed that European rule was the best way to end evil practices such as the slave trade. They also wanted to "civilize," that is, to "Westernize," the peoples of the foreign land.

Cecil Rhodes was founding chairman of De Beers Consolidated Mines, which is the biggest diamond company in the world today.



Factors Promoting Imperialism in Africa Several factors contributed to the Europeans' conquest of Africa. One major advantage was the Europeans' technological superiority. The Maxim gun, invented in 1884, was the world's first automatic machine gun. European countries quickly acquired the Maxim, while the resisting Africans were forced to rely on outdated weapons.

European countries also had the means to control their empire. The invention of the steam engine allowed Europeans to easily travel on rivers to establish bases of control deep in the African continent. Modes of transportation such as railroads, cables, and steamships allowed close communications within a colony and between the colony and its controlling nation.

Reading Check
Analyze Causes
How did European
technology advance
imperialism?

Even with superior arms and steam engines to transport them, another factor might have kept Europeans confined to the coast. They were highly susceptible to malaria, a disease carried by the dense swarms of mosquitoes in Africa's interior. The perfection of the drug quinine in 1829 eventually protected Europeans from becoming infected with this disease.

Factors within Africa also made the continent easier for Europeans to colonize. Africans' huge variety of languages and cultures discouraged unity among them. Wars fought between ethnic groups over land, water, and trade rights also prevented a unified stand. Europeans soon learned to play rival groups against each other.

The Division of Africa

The scramble for African territory had begun in earnest about 1880. At that time, the French began to expand from the West African coast toward western Sudan. The discoveries of diamonds in 1867 and gold in 1886 in South Africa increased European interest in colonizing the continent. No European power wanted to be left out of the race.

Berlin Conference Divides Africa The competition was so fierce that European countries feared war among themselves. To prevent conflict, 14 European nations met at the **Berlin Conference** in 1884–85 to lay down rules for the division of Africa. They agreed that any European country could claim land in Africa by notifying other nations of its claims and showing it could control the area. The European nations divided the continent with little thought about how African ethnic or linguistic groups were distributed. No African ruler was invited to attend these meetings, yet the conference sealed Africa's fate. By 1914, only Liberia and Ethiopia remained free from European control.

Demand for Raw Materials Shapes Colonies When European countries began colonizing, many believed that Africans would soon be buying European goods in great quantities. They were wrong; few Africans bought European goods. However, European businesses still needed raw materials from Africa. The major source of great wealth in Africa proved to be the continent's rich mineral resources. The Belgian Congo contained untold wealth in copper and tin. Even these riches seemed small compared with the gold and diamonds in South Africa.

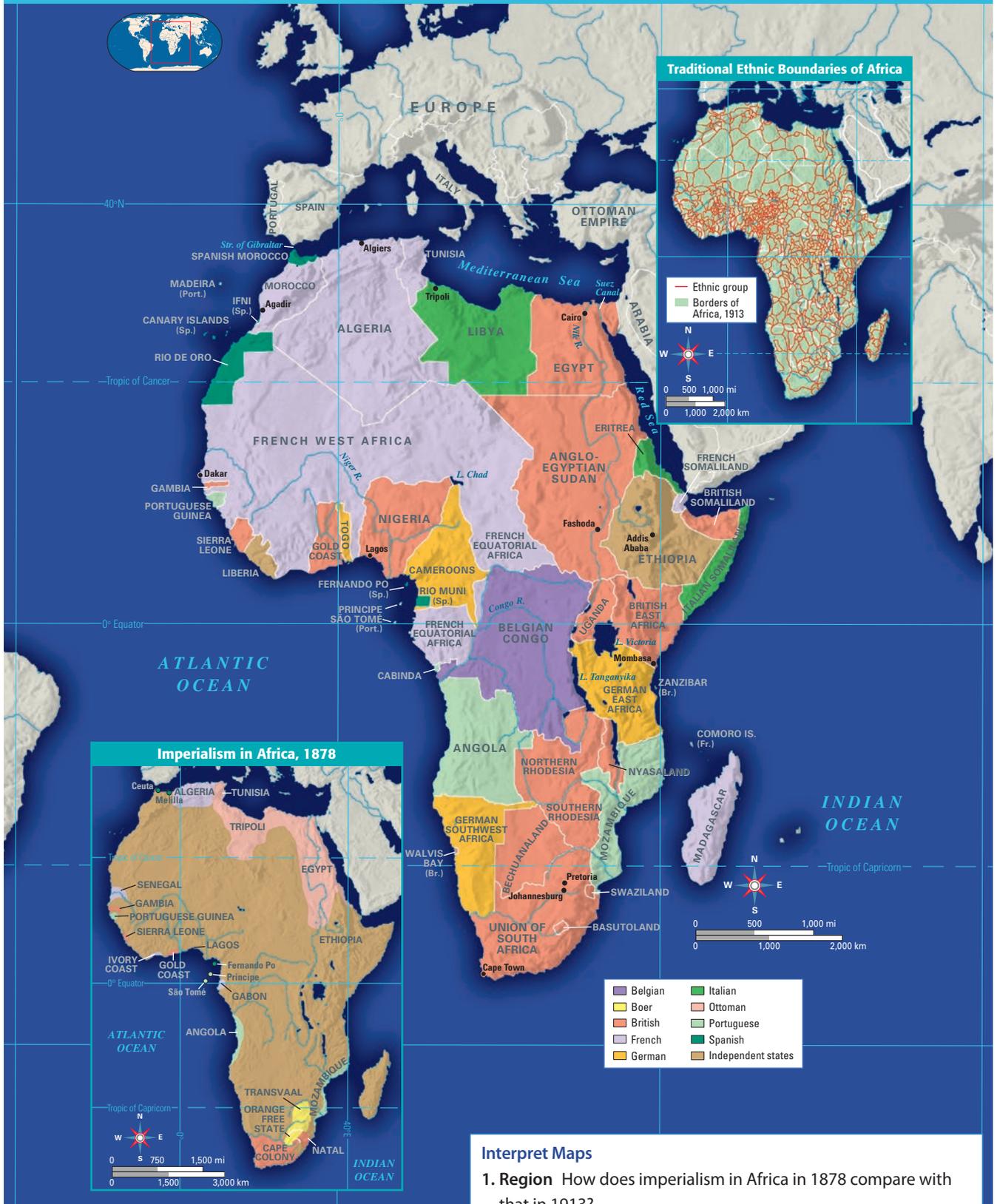
Businesses eventually developed cash-crop plantations to grow peanuts, palm oil, cocoa, and rubber. These products displaced the food crops grown by farmers to feed their families.

Three Groups Clash over South Africa

South Africa demonstrated the impact that Europeans had on African peoples. The history of South Africa is a history of Africans, Dutch, and British clashing over land and resources. Although the African lands seemed empty to the Europeans, various ethnic groups had competing claims over huge areas. The local control of these lands, especially in the east, had been in dispute for about 100 years.

Reading Check
Summarize
What was the
purpose of the Berlin
Conference?

Imperialism in Africa, 1913



Interpret Maps

- Region** How does imperialism in Africa in 1878 compare with that in 1913?
- Region** What does the map of ethnic boundaries suggest about the number of ethnic groups in Africa in 1913?

Zulus Fight the British From the late 1700s to the late 1800s, a series of local wars shook southern Africa. Around 1816, a Zulu chief, **Shaka**, used highly disciplined warriors and good military organization to create a large centralized state.

Shaka's successors, however, were unable to keep the kingdom together against the superior arms of the British invaders. In 1879, after Zulu king Cetshwayo refused to dismiss his army and accept British rule, the British invaded the Zulu nation. Although the Zulus used spears and shields against British guns, they nearly defeated the great European army. In July 1879, however, the Zulus lost the Battle of Ulundi and their kingdom. The Zulu nation fell to British control in 1887.

Boers and British Settle in the Cape The first Europeans to settle in South Africa had been the Dutch. The Dutch came to the Cape of Good Hope in 1652 to establish a way station for their ships sailing between the Dutch East Indies and the Netherlands. Dutch settlers known as **Boers** (Dutch for "farmers") gradually took Africans' land and established large farms. (The Boers are also known as Afrikaners.) When the British took over the Cape Colony permanently in the early 1800s, they and the Boers clashed over British policy regarding land and slaves.

In the 1830s, to escape the British, several thousand Boers began to move north. This movement has become known as the Great Trek. The Boers soon found themselves fighting fiercely with Zulu and other African groups whose land they were taking.



Reinstated as ruler over part of his former nation, King Cetshwayo was soon driven away and died in exile in 1884.

The Boer War Diamonds and gold were discovered in southern Africa in the 1860s and 1880s. Suddenly, adventurers from all parts of the world rushed in to make their fortunes. The Boers tried to keep these "outsiders" from gaining political rights. An attempt to start a rebellion against the Boers failed. The Boers blamed the British and, in 1899, took up arms against them.

In many ways, the **Boer War** (also known as the South African War) between the British and the Boers was the first modern "total" war. The Boers launched commando raids and used guerrilla tactics against the British. The British countered by burning Boer farms and imprisoning women and children in disease-ridden concentration camps.

History in Depth

Winston Churchill and the Boer War

Winston Churchill, who served as the British prime minister during World War II, first came to public attention during the Boer War.

A war correspondent, Churchill was traveling with British soldiers when their train was ambushed by the Boers. Churchill pulled some of the wounded men to safety. When he returned to help the others, however, he was arrested by a Boer soldier. (The soldier, Louis Botha, would later become the prime minister of the Union of South Africa and Churchill's close friend.)

Churchill managed to escape from the South African prison. When he returned to Britain, Churchill was hailed as a national hero at the age of 26.



Black South Africans were also involved in the war. Some fought; others served as scouts, guards, drivers, and workers. Many black South Africans were captured by the British and placed in concentration camps, where over 14,000 died.

Britain finally won the war. In 1910, the Boer republics were joined into a self-governing Union of South Africa, which was controlled by the British.

The establishing of colonies signaled a change in the way of life of the Africans. The Europeans made efforts to change the political, social, and economic lives of the peoples they conquered. You will learn about these changes in Lesson 2.

Reading Check

Contrast How was the struggle for land in the Boer War different from other takeovers in Africa?

Lesson 1 Assessment

- 1. Organize Information** In an outline, note the lesson's main ideas. How did Europeans use Social Darwinism to justify empire building?

The Scramble for Africa
I. Africa Before European Domination
A.
B.
II. Forces Driving Imperialism
- 2. Key Terms and People** For each key term or person in the lesson, write a sentence explaining its significance.
- 3. Synthesize** Why did the Europeans control such a small portion of Africa in the 1800s?
- 4. Summarize** What were some of the internal factors that contributed to imperialism in Africa? Cite specific text evidence in your response.
- 5. Analyze Issues** Why did the Boers and the British fight over southern Africa?
- 6. Make Inferences** What can you infer about the Europeans' attitude toward Africans from the Berlin Conference?
- 7. Form Generalizations** Why do you think Africans weren't interested in buying European products?



Case Study

Nigeria

Imperialism in Africa

The Big Idea

Europeans embarked on a new phase of empire building that affected both Africa and the rest of the world.

Why It Matters Now

Many former colonies have political problems that are the result of colonial rule.

Key Terms and People

paternalism
assimilation
Menelik II

Setting the Stage

The Berlin Conference of 1884–85 was a European conference. And, although black South Africans participated in it, the Boer War was largely a European war. Europeans argued and fought among themselves over the lands of Africa. In carving up the continent, the European countries paid little or no attention to historical political divisions or to the many ethnic and language groupings in Africa. Uppermost in the minds of the Europeans was the ability to control Africa's land, its people, and its resources.

A New Period of Imperialism

The imperialism of the 18th and 19th centuries was conducted differently from the explorations of the 15th and 16th centuries. In the earlier period, imperial powers often did not penetrate far into the conquered areas in Asia and Africa. Nor did they always have a substantial influence on the lives of the people. During this new period of imperialism, the Europeans demanded more influence over the economic, political, and social lives of the people. They were determined to shape the economies of the lands to benefit European economies. They also wanted the people to adopt European customs.

Forms of Control Each European nation had certain policies and goals for establishing colonies. To establish control of an area, Europeans used different techniques. Over time, four forms of colonial control emerged: colony, protectorate, sphere of influence, and economic imperialism. These terms are defined and discussed in the chart in this lesson. In practice, gaining control of an area might involve the use of several of these forms.



10.4.1; 10.4.2; 10.4.3; CST.1; CST.2; CST.3;

HI.2

Methods of Management European rulers also developed methods of day-to-day management of the colony. Two basic methods emerged. Britain and other nations—such as the United States in its Pacific Island colonies—preferred indirect control. France and most other European nations wielded a more direct control. Later, when colonies gained independence, the management method used had an influence on the type of government chosen in the new nation.

Indirect Control Indirect control relied on existing political rulers. In some areas, the British asked a local ruler to accept British authority to rule. These local officials handled much of the daily management of the colony. In addition, each colony had a legislative council that included colonial officials as well as local merchants and professionals nominated by the colonial governor.

The assumption was that the councils would train local leaders in the British method of government and that a time would come when the local population would govern itself. This had happened earlier in the British colonies of Australia and Canada. In the 1890s, the United States began to colonize. It chose the indirect method of control for the Philippines.

Direct Control The French and other European powers preferred more direct control of their colonies. They viewed the Africans as unable to handle the complex business of running a country. Based on this attitude, the Europeans developed a policy called **paternalism**. Using that policy, Europeans governed people in a parental way by providing for their needs but not giving them rights. To accomplish this, the Europeans brought in their own bureaucrats and did not train local people in European methods of governing.

The French also supported a policy of **assimilation**. That policy was based on the idea that in time, the local populations would adopt French culture and become like the French. To aid in the transition, all local schools, courts, and businesses were patterned after French institutions. In practice, the French abandoned the ideal of assimilation for all but a few places and settled for a policy of “association,” which was similar to indirect control. They recognized African institutions and culture but regarded them as inferior to French culture. This notion was based on race as a European-centered social construct.

Reading Check

Contrast

Were there differences between direct control and indirect control of colonies in Africa? Explain.

Industry expanded even more in Europe as a result of colonization in Africa, but few Africans benefitted from such European economic success.



Imperialism

Imperialism is a policy in which one country seeks to extend its authority by conquering other countries or by establishing economic and political dominance over other countries. The first chart below discusses the four forms of imperialist authority. The second chart shows the two management methods that can be used to control an area.

Forms of Imperialism		
Form	Definition	Example
Colony	A country or a territory governed internally by a foreign power	Somaliland in East Africa was a French colony.
Protectorate	A country or a territory with its own internal government but under the control of an outside power	Britain established a protectorate over the Niger River delta.
Sphere of Influence	An area in which an outside power claims exclusive investment or trading privileges	Liberia was under the sphere of influence of the United States.
Economic Imperialism	An independent but less-developed country controlled by private business interests rather than other governments	The Dole Fruit company controlled pineapple trade in Hawaii.

Imperial Management Methods	
Indirect Control	Direct Control
Local government officials were used	Foreign officials brought in to rule
Limited self-rule	No self-rule
Goal: to develop future leaders	Goal: assimilation
Government institutions are based on European styles but may have local rules.	Government institutions are based only on European styles.
Examples:	Examples:
British colonies such as Nigeria, India, Burma	French colonies such as Somaliland, Vietnam
U.S. colonies on Pacific Islands	German colonies such as German East Africa Portuguese colonies such as Angola

Critical Thinking

1. Evaluate Which form of managing imperial interests do you think would be most effective, and why?

2. Develop Historical Perspective Use the Internet or library resources to research the problems many African nations are facing today as a result of imperialism. Report your findings to the class.

A British Colony

A close look at Britain's rule of Nigeria illustrates the forms of imperialism used by European powers to gain control of an area. It also shows management methods used to continue the control of the economic and political life of the area.

Gaining Control Britain gained control of southern Nigeria through both diplomatic and military means. Some local rulers agreed to sign treaties of protection with Britain and accepted British residents. However, others opposed the foreign intervention and rebelled against it. The British used force to put down and defeat these rebellions.

British conquest of northern Nigeria was accomplished by the Royal Niger Company. The company gained control of the palm-oil trade along the Niger River after the Berlin Conference gave Britain a protectorate over the Niger River delta. In 1914, the British claimed the entire area of Nigeria as a colony.

Managing the Colony In this new age of imperialism, it was necessary not only to claim a territory but also to govern the people living there. However, managing Nigeria would not prove to be easy. It was one of the most culturally diverse areas in Africa.

About 250 different ethnic groups lived there. The three largest groups were the Hausa-Fulani in the north, the Yoruba in the southwest, and the Igbo in the southeast. These groups were different from one another in many ways, including language, culture, and religion. The Hausa-Fulani people were Muslim and had a strong central government. The Igbo and Yoruba peoples followed traditional religions and relied on local chiefs for control.

Britain did not have enough troops to govern such a complex area. As a result, the British turned to indirect rule of the land. Ruling indirectly through local officials worked well with the Hausa-Fulani. However, this management method did not work as well with the Igbo and Yoruba peoples. Their local chiefs resented having their power limited by the British.

Reading Check

Summarize Which forms of imperialistic control did Britain use in Nigeria?

Nigeria, 1914



Interpret Maps

- 1. Region** How many major culture regions are found within the colony of Nigeria? What sort of problems might result from combining or splitting groups of people?
- 2. Movement** Why might the British want to be able to control the Niger River?

African Resistance

As in Nigeria, Africans across the continent resisted European attempts to colonize their lands. However, the contest between African states and European powers was never equal because of the Europeans' superior arms. Africans resisted the Europeans with whatever forces they could raise and often surprised the Europeans with their military ability. With the single exception of Ethiopia, though, all these attempts at resistance ultimately failed.

DOCUMENT-BASED INVESTIGATION Historical Source

The Black Man's Burden

French-born British journalist Edward Morel lived for a time in the Congo. While there, he made an observation about African resistance in a 1920 book he wrote in response to Rudyard Kipling's poem "The White Man's Burden."

Analyze Historical Sources

What reason does Morel offer for why African resistance had waned?

"Nor is violent physical opposition to abuse and injustice henceforth possible for the African in any part of Africa. His chances of effective resistance have been steadily dwindling with the increasing perfectibility in the killing power of modern armament."

"Thus the African is really helpless against the material gods of the white man, as embodied in the trinity of imperialism, capitalistic exploitation, and militarism."

—Edward Morel, *The Black Man's Burden*

Unsuccessful Movements The unsuccessful resistance attempts included active military resistance and resistance through religious movements. Algeria's almost 50-year resistance to French rule was one outstanding example of active resistance. Resistance to the British on the Gold Coast was carried out by the Ashanti in the Ashanti Wars but was unsuccessful, largely because of military inferiority. The resistance movement led by Samori Touré in West Africa against the French is another example. After modernizing his army, Touré fought the French for 16 years.

Africans in German East Africa put their faith in a spiritual defense. African villagers resisted the Germans' insistence that they plant cotton, a cash crop for export, rather than attend to their own food crops. In 1905, the belief suddenly arose that a magic water (*maji-maji*) sprinkled on their bodies would turn the Germans' bullets into water. The uprising became known as the Maji Maji Rebellion. Over 20 different ethnic groups united to fight for their freedom. The fighters believed that their war had been ordained by God and that their ancestors would return to life and assist their struggle.

Samori Touré

(about 1830–1900)

Samori Touré is a hero of the Mandingo people. His empire is often compared to the great Mali Empire of the 1300s.

Touré was a nationalist who built a powerful Mandingo kingdom by conquering neighboring states. His kingdom became the third largest empire in West Africa.

For 16 years, Touré opposed the French imperialists in West Africa. The well-armed Mandingo were France's greatest foe in West Africa, and the two armies clashed several times. The Mandingo Empire was finally brought down, not in battle but by a famine.

However, when resistance fighters armed with spears and protected by the magic water attacked a German machine-gun post, they were mowed down by the thousands. Officially, Germans recorded 75,000 resisters dead. But more than twice that number perished in the famine that followed. The Germans were shaken by the rebellion and its outcome. As a result, they made some government reforms in an effort to make colonialism more acceptable to the Africans.

Ethiopia: A Successful Resistance Ethiopia was the only African nation that successfully resisted the Europeans. Its victory was due to one man—**Menelik II**. He became emperor of Ethiopia in 1889. He successfully played Italians, French, and British against each other, all of whom were striving to bring Ethiopia into their spheres of influence. In the meantime, he built up a large arsenal of modern weapons purchased from France and Russia. In 1889, shortly after Menelik had signed a treaty with Italy, he discovered differences between the wording of the treaty in the Ethiopian language and in Italian.

Menelik believed he was giving up a tiny portion of Ethiopia. However, the Italians claimed all of Ethiopia as a protectorate. Meanwhile, Italian forces were advancing into northern Ethiopia. Menelik declared war. In 1896, in one of the greatest battles in the history of Africa—the Battle of Adowa—Ethiopian forces successfully defeated the Italians and kept their nation independent. After the battle, Menelik continued to stockpile rifles and other modern weapons in case another foreign power challenged Ethiopia's liberty.



After defeating Italy, Menelik II modernized Ethiopia by constructing a railroad and weakening the power of the nobility.

Reading Check
Analyze Causes Why do you think that Ethiopia was the only African country to resist European imperialism?

Resistance Movements in Africa, 1881–1906



Interpret Maps

- 1. Region** Which region had the largest area affected by resistance?
- 2. Region** Was any region unaffected by resistance movements?

The Legacy of Colonial Rule

European colonial rule forever altered Africans' lives. In some cases, the Europeans brought benefits, but for the most part, the effects were negative.

Negative Effects On the negative side, Africans lost control of their land and their independence. Many died of new diseases such as smallpox. They also lost thousands of their people in resisting the Europeans. Famines resulted from the change to cash crops in place of subsistence agriculture. This practice would also impact Africa's economy after imperialism ended. Many Africans were forced to migrate for work, which altered their diets and caused them to neglect their food crops.

Africans also suffered from a breakdown of their traditional cultures. Traditional authority figures were replaced. Homes and property were transferred with little regard to their importance to the people. Men were forced to leave villages to find ways to support themselves and their families. Contempt for the traditional culture and admiration of European life undermined stable societies and caused identity problems for Africans.

The most harmful political legacy from the colonial period was the division of the African continent. Long-term rival chiefdoms were sometimes united, while at other times, kinship groups were split between colonies. The artificial boundaries combined or unnaturally divided groups, creating problems that plagued African colonies during European occupation. These boundaries continue to create problems for the nations that evolved from the former colonies.

Positive Effects On the positive side, colonialism reduced local warfare. Humanitarian efforts in some colonies improved sanitation and provided hospitals and schools. As a result, lifespans increased and literacy rates improved. Also positive was the economic expansion. African products came to be valued on the international market. To aid the economic growth, railroads, dams, and telephone and telegraph lines were built in African colonies. But for the most part, these benefited only European business interests, not Africans' lives.

The patterns of behavior of imperialist powers were similar, no matter where their colonies were located. Dealing with local traditions and peoples continued to cause problems in other areas of the world dominated by Europeans. Resistance to the European imperialists also continued, as you will see in Lesson 4.

Reading Check

Draw Conclusions

Why might the problems caused by artificial boundaries continue after the Europeans left?

Lesson 2 Assessment

- 1. Organize Information** Use a scale like the one below to rate each effect of imperialism on Africa.
Do you think the positive effects of imperialism outweighed the negative impact? Why or why not?

- 2. Key Terms and People** For each key term or person in the lesson, write a sentence explaining its significance.
- 3. Make Inferences** Why were African resistance movements, such as those carried out by the Ashanti, usually unsuccessful?
- 4. Analyze Effects** How did colonial rule cause a breakdown in traditional African culture?
- 5. Evaluate** What important questions should be asked about the Industrial Revolution and how it related to European imperialism in Africa?
- 6. Compare** How was the policy of paternalism like Social Darwinism?

History in Depth

Views of Imperialism

European imperialism extended to the continents beyond Africa. As imperialism spread, the colonizer and the colonized viewed the experience of imperialism in very different ways. Some Europeans were outspoken about the superiority they felt toward the peoples they conquered. Others thought imperialism was very wrong. Even the conquered had mixed feelings about their encounters with the Europeans.

J. A. HOBSON

Hobson's 1902 book, *Imperialism*, made a great impression on his fellow Britons.

"For Europe to rule Asia by force for purposes of gain, and to justify that rule by the pretence that she is civilizing Asia and raising her to a higher level of spiritual life, will be adjudged by history, perhaps, to be the crowning wrong and folly of Imperialism. What Asia has to give, her priceless stores of wisdom garnered from her experience of ages, we refuse to take; the much or little which we could give we spoil by the brutal manner of our giving. This is what Imperialism has done, and is doing, for Asia."



DADABHAI NAOROJI

Dadabhai Naoroji was the first Indian elected to the British Parliament. In 1871, he delivered a speech about the impact of Great Britain on India.

"To sum up the whole, the British rule has been—morally, a great blessing; politically peace and order on one hand, blunders on the other, materially, impoverishment. . . . The natives call the British system "Sakar ki Churi," the knife of sugar. That is to say there is no oppression, it is all smooth and sweet, but it is the knife, notwithstanding. I mention this that you should know these feelings. Our great misfortune is that you do not know our wants. When you will know our real wishes, I have not the least doubt that you would do justice. The genius and spirit of the British people is fair play and justice."

This 1882 American political cartoon, titled "The Devilfish in Egyptian Waters," depicts England as an octopus. Notice that Egypt is not yet one of the areas controlled by the British.

Analyze Issues

Choose two sources among the three sources shown (the two text excerpts and the political cartoon) to compare and contrast based on their frame of reference and how those affect the viewpoints expressed. Which sources are more credible? Do any of the sources have limitations? Explain.



Europeans Claim Muslim Lands

The Big Idea

European nations expanded their empires by seizing territories from Muslim states.

Why It Matters Now

Political events in this vital resource area are still influenced by actions from the imperialistic period.

Key Terms and People

geopolitics
Crimean War
Suez Canal

Setting the Stage

The European powers that carved up Africa also looked elsewhere for other lands to control. The Muslim lands that rimmed the Mediterranean had largely been claimed as a result of Arab and Ottoman conquests. As you have learned, the Ottoman Empire at its peak stretched from Hungary in the north, around the Black Sea, and across Egypt all the way west to the borders of Morocco. But during the empire's last 300 years, it had steadily declined in power. Europeans competed with each other to gain control of this strategically important area.

Ottoman Empire Loses Power

The declining Ottoman Empire had difficulties trying to fit into the modern world. However, the Ottomans made attempts to change before they finally were unable to hold back the European imperialist powers.

Reforms Fail When Suleyman I, the last great Ottoman sultan, died in 1566, he was followed by a succession of weak sultans. The palace government broke up into a number of quarreling, often corrupt factions. Weakening power brought other problems. Corruption and theft had caused financial losses. Coinage was devalued, causing inflation. Once the Ottoman Empire had embraced modern technologies, but now it fell further and further behind Europe.

When Selim III came into power in 1789, he attempted to modernize the army. However, the older janissary corps resisted his efforts. Selim III was overthrown, and reform movements were temporarily abandoned. Meanwhile, nationalist feelings began to stir among the Ottomans' subject peoples. In 1830, Greece gained its independence and Serbia gained self-rule. The Ottomans' weakness was becoming apparent to European powers, who were expanding their territories. They began to look for ways to take the lands away from the Ottomans.



10.4.1; 10.4.2

Reading Check

Summarize

How did the Young Turks unite people against the Ottoman sultan and consolidate their power?

Meanwhile, in 1908 the Young Turks used nationalism to unite people against the Ottoman sultan, and after consolidating power helped modernize the empire. They proclaimed that every citizen would have equal rights regardless of nationality or religion and adopted a constitution, but they kept Turkish as the sole official language of the state. The Young Turks lost power before completing the reforms that they had planned.

Europeans Grab Territory

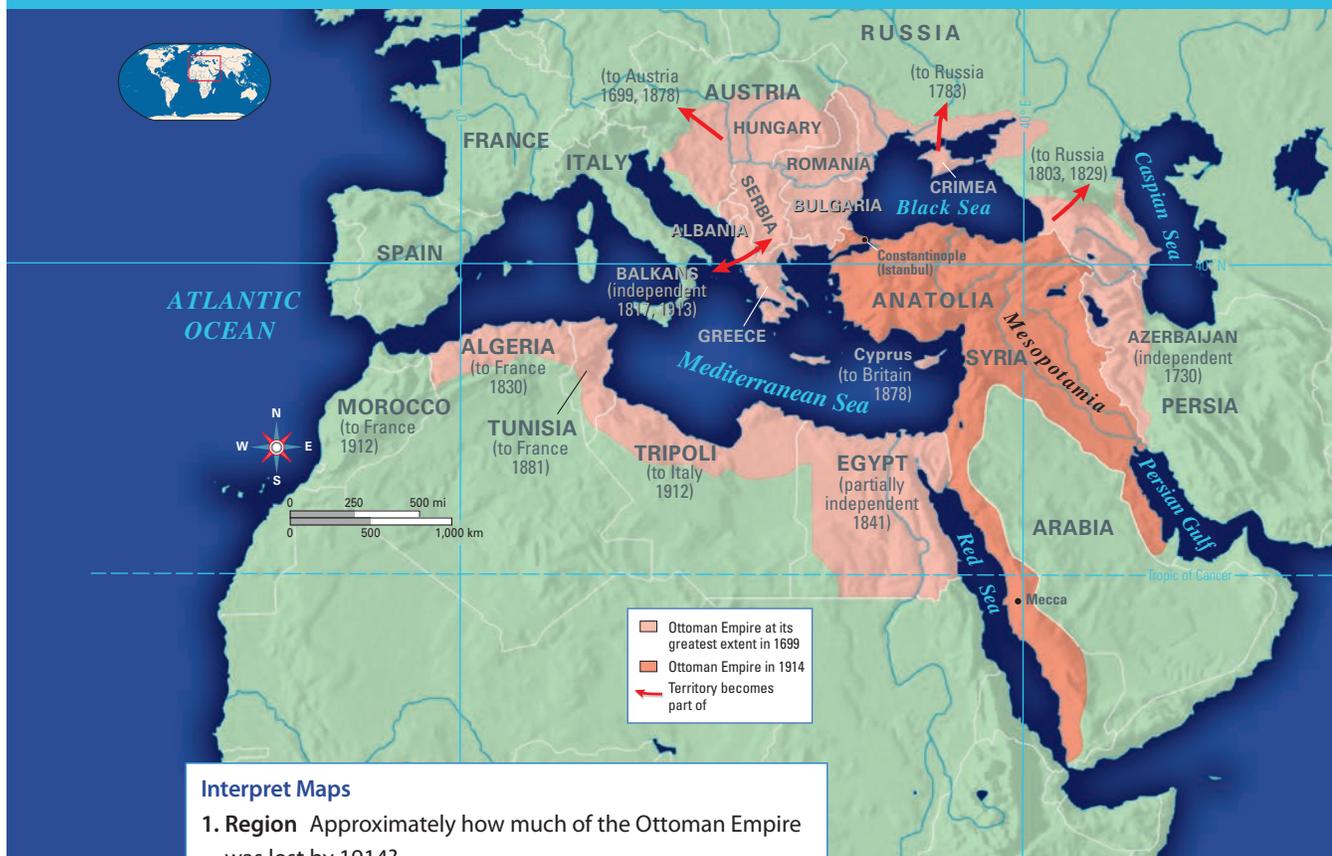
Geopolitics, an interest in or taking of land for its strategic location or products, played an important role in the fate of the Ottoman Empire. World powers were attracted to its strategic location. The Ottomans controlled access to the Mediterranean and the Atlantic sea trade. Merchants in landlocked countries that lay beyond the Black Sea had to go through Ottoman lands. Russia, for example, desperately wanted passage for its grain exports across the Black Sea and into the Mediterranean Sea. This desire strongly influenced Russia's relations with the Ottoman Empire. Russia attempted to win Ottoman favor, formed alliances with Ottoman enemies, and finally waged war against the Ottomans. Discovery of oil in Persia around 1900 and in the Arabian Peninsula after World War I focused even more attention on the area.

Russia and the Crimean War Each generation of Russian czars launched a war on the Ottomans to try to gain land on the Black Sea. The purpose was to give Russia a warm-water port. In 1853, war broke out between the Russians and the Ottomans. The war was called the **Crimean War**, after a peninsula in the Black Sea where most of the war was fought. Britain and France wanted to prevent the Russians from gaining control of additional Ottoman lands. So they entered the war on the side of the Ottoman Empire. The combined forces of the Ottoman Empire, Britain, and France defeated Russia. The Crimean War was the first war in which women, led by Florence Nightingale, established their position as army nurses. It was also the first war to be covered by newspaper correspondents.

The Crimean War revealed the Ottoman Empire's military weakness. Despite the help of Britain and France, the Ottoman Empire continued to lose lands. The Russians came to the aid of Slavic people in the Balkans who rebelled against the Ottomans. The Ottomans lost control of Romania, Montenegro, Cyprus, Bosnia, Herzegovina, and an area that became Bulgaria. The Ottomans lost land in Africa, too. By the beginning of World War I, the Ottoman Empire was in deep decline.

The Great Game For much of the 19th century, Great Britain and Russia engaged in yet another geopolitical struggle, this time over Muslim lands in Central Asia. Known as the "Great Game," the war was waged over India, one of Britain's most profitable colonies. Russia sought to extend its empire and gain access to India's riches. Britain defended its colony and also attempted to spread its empire beyond India's borders. Afghanistan, which lay between the Russian and British empires, became the center of their struggle.

Ottoman Empire, 1699–1914



Interpret Maps

- Region** Approximately how much of the Ottoman Empire was lost by 1914?
- Region** How many European nations claimed parts of the Ottoman Empire? Which areas became independent?

Reading Check

Make Inferences

How did the Crimean War help lead to the decline of the Ottoman Empire?

In the 1800s, Afghanistan was an independent Muslim kingdom. Its dry, mountainous terrain and determined people continually frustrated the invading imperial powers. After decades of fighting, Great Britain finally withdrew from Afghanistan in 1881. In 1921, Britain formally agreed that its empire would not extend beyond the Khyber Pass, which borders eastern Afghanistan. The newly formed Soviet Union, meanwhile, signed a nonaggression pact with Afghanistan. That agreement was honored until 1979, when the Soviet Union invaded Afghanistan.

Egypt Initiates Reforms

Observing the slow decline of the Ottoman Empire, some Muslim leaders decided that their countries would either have to adjust to the modern world or be consumed by it. Egypt initiated political and social reforms, in part to block European domination of its land.

Military and Economic Reforms Modernization came to Egypt as a result of the interest in the area created by the French occupation. Egypt's strategic location at the head of the Red Sea appeared valuable to France and Britain. After Napoleon failed to win Egypt, a new leader emerged:

Muhammad Ali. The Ottomans sent him as part of an expeditionary force to govern Egypt, but he soon broke away from Ottoman control. Beginning in 1831, he fought a series of battles in which he gained control of Syria and Arabia. Through the combined efforts of European powers, Muhammad Ali and his heirs were recognized as the hereditary rulers of Egypt.

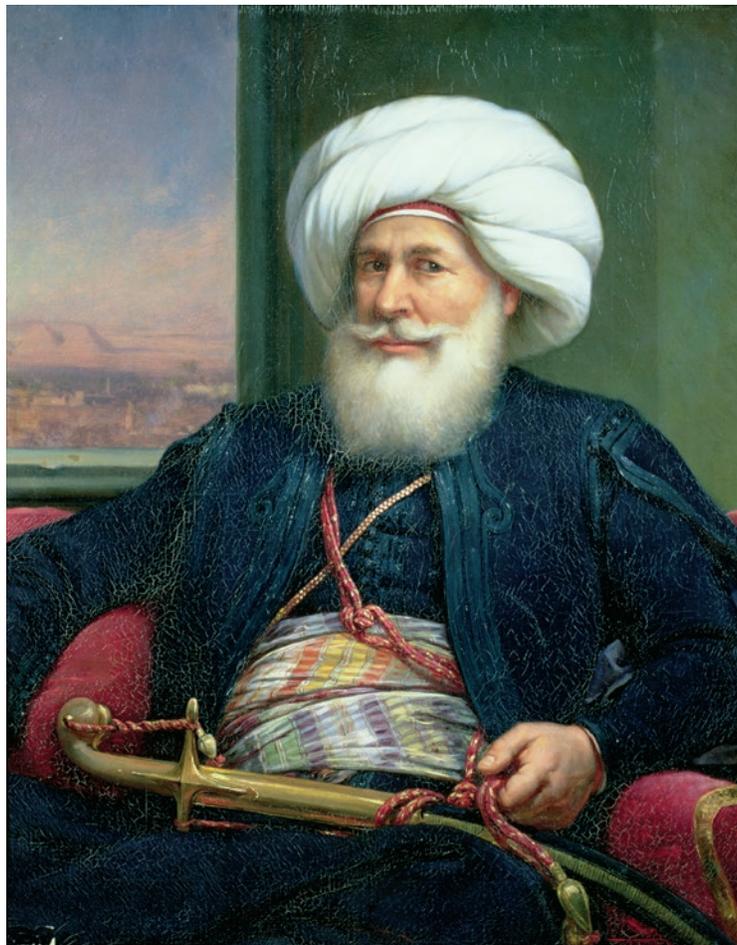
Muhammad Ali began a series of reforms in the military and in the economy. Without foreign assistance, he personally directed a shift of Egyptian agriculture to a plantation cash crop—cotton. This brought Egypt into the international marketplace but at a cost to the peasants. They lost the use of lands they traditionally farmed and were forced to grow cash crops in place of food crops.

The Suez Canal Muhammad Ali's efforts to modernize Egypt were continued by his grandson, Isma'il. Isma'il supported the construction of the **Suez Canal**. The canal was a human-made waterway that cut through the Isthmus of Suez. It connected the Red Sea to the Mediterranean. It was built mainly with French money from private interest groups, using Egyptian labor. The Suez Canal opened in 1869 with a huge international celebration. However, Isma'il's modernization efforts, such as irrigation projects and communication networks, were enormously expensive. Egypt soon found that it could not pay its European bankers even the interest on its \$450 million debt. The British insisted on overseeing financial control of the canal, and in 1882 the British occupied Egypt.

Reading Check

Analyze Effects

What two effects did raising cotton have on Egyptian agriculture?



Muhammad Ali was a common soldier who rose to leadership as a result of his military skill and political shrewdness.

History in Depth

Suez Canal

The Suez Canal was viewed as the “Lifeline of the Empire” because it allowed Britain quicker access to its colonies in Asia and Africa. In a speech to Parliament, Joseph Chamberlain explained that he believed Britain should continue its occupation of Egypt because of “the necessity for using every legitimate opportunity to extend our influence and control in that great African continent which is now being opened up to civilization and to commerce.”

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This painting represents the opening celebration of the canal on November 17, 1869.

Interpret Maps

Place Approximately how long is the Suez Canal?

Persia Pressured to Change

Elsewhere in southwest Asia, Russia and Britain competed to exploit Persia commercially and to bring that country under their own spheres of influence. Russia was especially interested in gaining access to the Persian Gulf and the Indian Ocean. Twice Persia gave up territories to Russia, after military defeats in 1813 and 1828. Britain was interested in using Afghanistan as a buffer between India and Russia. In 1857, Persia resisted British demands but was forced to give up all claims to Afghanistan. Britain’s interest in Persia increased greatly after the discovery of oil there in 1908.

Persia lacked the capital to develop its own resources. To raise money and to gain economic prestige, the Persian ruler began granting concessions to Western businesses. These concessions allowed businesses to buy the right to operate in a certain area or develop a certain product. For example, a British corporation, the Anglo-Persian Oil Company, began to develop Persia’s rich oil fields in the early 1900s.



Nasir al-Din was killed by one of al-Afghani's followers a few years after the boycott.

Battle over Tobacco Tension arose between the often corrupt rulers, who wanted to sell concessions to Europeans, and the people. The people were often backed by religious leaders who feared change or disliked Western influence in their nation. In 1890, Persian ruler Nasir al-Din sold a concession to a British company to export Persian tobacco. This action outraged Jamal al-Din al-Afghani, a leader who supported the modernization of Persia. He helped set up a tobacco boycott by the heavy-smoking Persians.

The tobacco boycott worked. Riots broke out, and the ruler was forced to cancel the concession. As unrest continued in Persia, however, the government was unable to control the situation. In 1906, a group of revolutionaries forced the ruler to establish a constitution. In 1907, Russia and Britain took over the country and divided it into spheres of influence. They exercised economic control over Persia.

In the Muslim lands, many European imperialists gained control by using economic imperialism and creating spheres of influence. Although some governments made attempts to modernize their nations, in most cases it was too little too late. In

other areas of the globe, imperialists provided the modernization. India, for example, became a colony that experienced enormous change as a result of the occupation of the imperialist British. You will learn about India in Lesson 4.

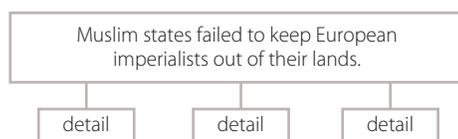
Reading Check

Analyze Issues

Why did al-Afghani set up a tobacco boycott?

Lesson 3 Assessment

- 1. Organize Information** Make a chart to show imperialistic forms of control that the Europeans used to govern Muslim lands.



- 2. Key Terms and People** For each key term or person in the lesson, write a sentence explaining its significance.
- 3. Draw Conclusions** Why did Great Britain want to control the Suez Canal?

- 4. Form Generalizations** Why did the Persian people oppose their ruler's policy of selling business concessions to Europeans?
- 5. Compare and Contrast** How were the reactions of African and Muslim rulers to imperialism similar? How were they different?
- 6. Develop Historical Perspective** What does the quotation in the History in Depth feature suggest about Joseph Chamberlain's view of British imperialism in Africa? How do you think perspectives of British imperialism changed over time?



British Imperialism in India

The Big Idea

As the Mughal Empire declined, Britain seized Indian territory and soon controlled almost the whole subcontinent.

Why It Matters Now

India, the second most populated nation in the world, has its political roots in this colony.

Key Terms and People

sepoy

"jewel in the crown"

Sepoy Mutiny

Raj

Setting the Stage

British economic interest in India began in the 1600s, when the British East India Company set up trading posts at Bombay, Madras, and Calcutta. At first, India's ruling Mughal Dynasty kept European traders under control. By 1707, however, the Mughal Empire was collapsing. Dozens of small states, each headed by a ruler or maharajah, broke away from Mughal control. In 1757, Robert Clive led East India Company troops in a decisive victory over Indian forces allied with the French at the Battle of Plassey. From that time until 1858, the East India Company was the leading power in India.

British Expand Control over India

The area controlled by the East India Company grew over time. Eventually, it governed directly or indirectly an area that included modern Bangladesh, most of southern India, and nearly all the territory along the Ganges River in the north.

East India Company Dominates

Officially, the British government regulated the East India Company's efforts both in London and in India. Until the beginning of the 19th century, the company ruled India with little interference from the British government. The company even had its own army, led by British officers and staffed by **sepoys**, or Indian soldiers. The governor of Bombay, Mountstuart Elphinstone, referred to the sepoy army as "a delicate and dangerous machine, which a little mismanagement may easily turn against us."



A sepoy in uniform



10.4.1; 10.4.2; 10.4.3

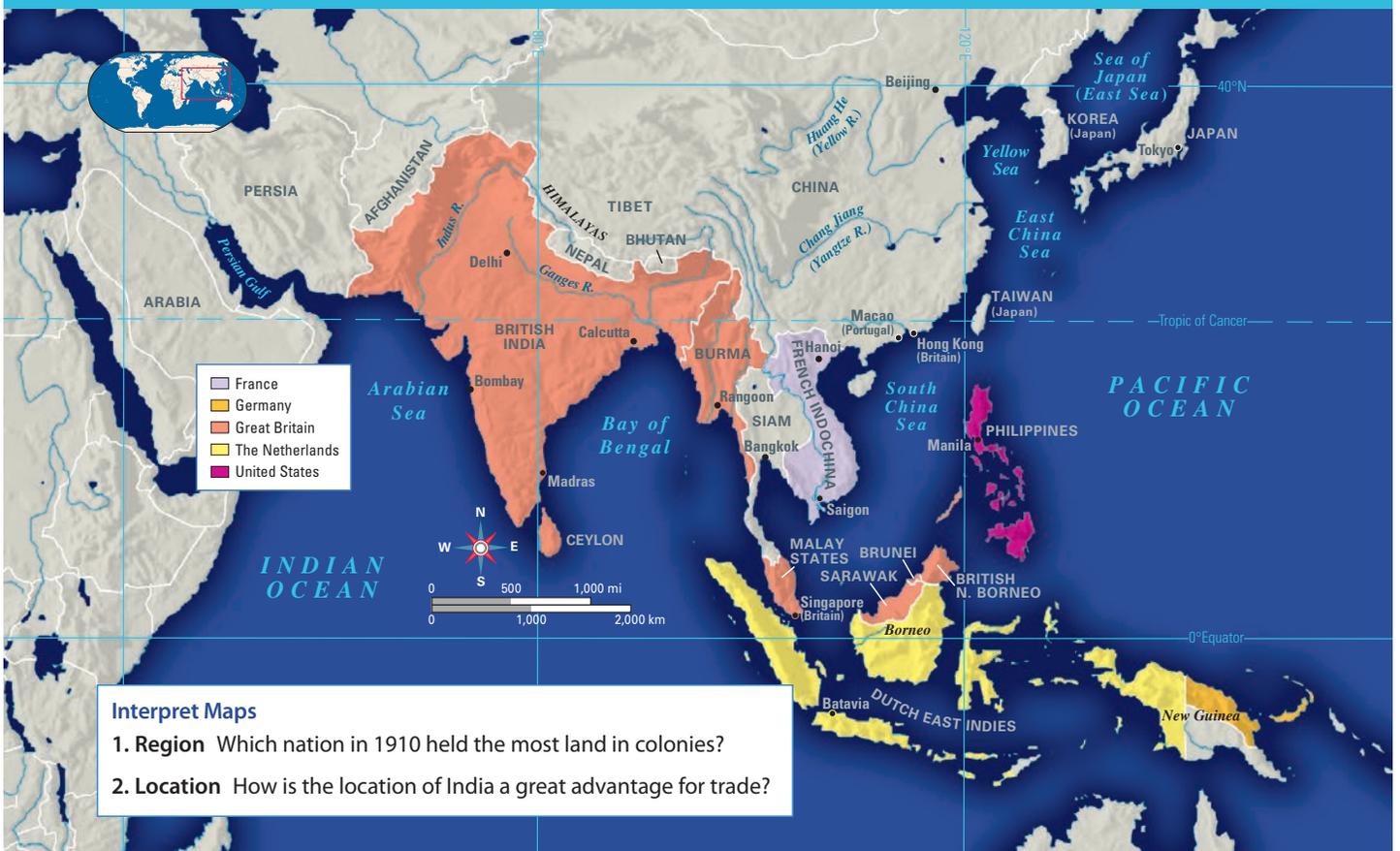
Britain’s “Jewel in the Crown” At first, the British treasured India more for its potential than its actual profit. The Industrial Revolution had turned Britain into the world’s workshop, and India was a major supplier of raw materials for that workshop. Its 300 million people were also a large potential market for British-made goods. It is not surprising, then, that the British considered India the brightest “**jewel in the crown,**” the most valuable of all of Britain’s colonies.

The British set up restrictions that prevented the Indian economy from operating on its own. British policies called for India to produce raw materials for British manufacturing and to buy British goods. In addition, Indian competition with British goods was prohibited. For example, India’s own handloom textile industry was almost put out of business by imported British textiles. Cheap cloth and ready-made clothes from England flooded the Indian market and drove out local producers.

British Transport Trade Goods India became increasingly valuable to the British after they established a railroad network there. Railroads transported raw products from the interior to the ports and manufactured goods back again. Most of the raw materials were agricultural products produced on plantations. Plantation crops included tea, indigo, coffee, cotton, and jute. Another crop was opium. The British shipped opium to China and exchanged it for tea, which they then sold in England.

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Western-Held Territories in Asia, 1910



Interpret Maps

- 1. Region** Which nation in 1910 held the most land in colonies?
- 2. Location** How is the location of India a great advantage for trade?

Trade in these crops was tied to international events. For example, the Crimean War in the 1850s cut off the supply of Russian jute to Scottish jute mills. This boosted the export of raw jute from Bengal, a province in India. Likewise, cotton production in India increased when the Civil War in the United States cut off supplies of cotton for British textile mills.

Impact of Colonialism India both benefited from and was harmed by British colonialism. On the negative side, the British held much of the political and economic power. The British restricted Indian-owned industries such as cotton textiles. The emphasis on cash crops resulted in a loss of self-sufficiency for many villagers and reduced food production, causing famines in the late 1800s. The British officially adopted a hands-off policy regarding Indian religious and social customs. Even so, the increased presence of missionaries and the racist attitude of most British officials threatened traditional Indian life. The British also introduced a census in India in which caste identities became formalized across the land.

On the positive side, the laying of the world's third largest railroad network was a major British achievement. When completed, the railroads enabled India to develop a modern economy and brought unity to the connected regions. Along with the railroads, a modern road network, telephone and telegraph lines, dams, bridges, and irrigation canals enabled India to modernize. Sanitation and public health improved. Schools and colleges were founded, and literacy increased. Also, British troops cleared central India of bandits and put an end to local warfare among competing local rulers.

Reading Check

Summarize

On which continents were Indian goods being traded?

SOCIAL HISTORY

Social Class in India

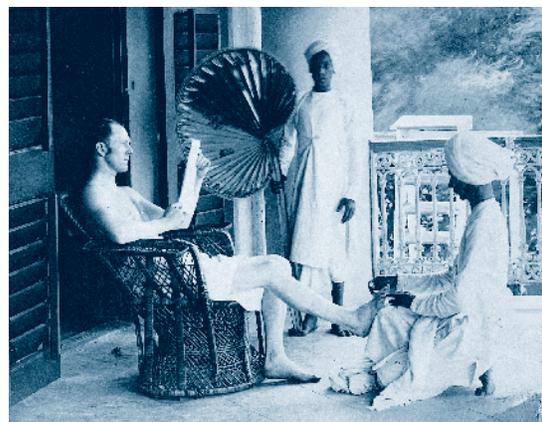
In the photograph at right, a British officer is waited on by Indian servants. This reflects the class system in India.

BRITISH ARMY

Social class determined the way of life for the British Army in India. Upper-class men served as officers. Lower-classes did not advance past the rank of sergeant. Only men with the rank of sergeant and above were allowed to bring their wives to India. Each officer's wife attempted to re-create England in the home setting. Like a general, she directed an army of 20 to 30 servants. Some officers also married or had children by local women. Their children, known as Anglo-Indians, were given more status than other Indians. Many went to England after India's independence in 1947.

INDIAN SERVANTS

Caste determined Indian occupations. House and personal servants were usually, but not always, lower caste Indians. Even within each caste, jobs were strictly regulated, which is why such large servant staffs were required. In the picture here, both servants are from the same caste.





This engraving shows sepoys attacking the British infantry at the Battle of Cawnpore in 1857.

The Sepoy Mutiny

By 1850, the British controlled most of the Indian subcontinent. However, there were many pockets of discontent. Many Indians believed that in addition to controlling their land, the British were trying to convert them to Christianity. The Indian people also resented the constant racism that the British expressed toward them.

Indians Rebel As economic problems increased for Indians, so did their feelings of resentment and nationalism. In 1857, gossip spread among the sepoys, the Indian soldiers, that the cartridges of their new Enfield rifles were greased with beef and pork fat. To use the cartridges, soldiers had to bite off the ends. Both Hindus, who consider the cow sacred, and Muslims, who do not eat pork, were outraged by the news.

A garrison commander was shocked when 85 of the 90 sepoys refused to accept the cartridges. The British handled the crisis badly. The soldiers who had disobeyed were jailed. The next day, on May 10, 1857, the sepoys rebelled. They marched to Delhi, where they were joined by Indian soldiers stationed there. They captured the city of Delhi. From Delhi, the rebellion spread to northern and central India.

Some historians have called this outbreak the **Sepoy Mutiny**. The uprising spread over much of northern India. Fierce fighting took place. Both British and sepoys tried to slaughter each other's armies. The East India Company took more than a year to regain control of the country. The British government sent troops to help them.

The Indians could not unite against the British due to weak leadership and serious splits between Hindus and Muslims. Hindus did not want the Muslim Mughal Empire restored. Indeed, many Hindus preferred British

The Sepoy Mutiny

The Sepoy Mutiny fueled the racist attitudes of the British. Lord Kitchener, British commander in chief of the army in India, illustrated these attitudes.

Analyze Historical Sources

What attitude do you think the native people had toward the British?

“It is this consciousness of the inherent superiority of the European which has won for us India. However well educated and clever a native may be, and however brave he may prove himself, I believe that no rank we can bestow on him would cause him to be considered an equal of the British officer.”

—Lord Kitchener, quoted in K. M. Panikkar, *Asia and Western Dominance*

rule to Muslim rule. Most of the princes and maharajahs who had made alliances with the East India Company did not take part in the rebellion. The Sikhs, a religious group that had been hostile to the Mughals, also remained loyal to the British. Indeed, from then on, the bearded and turbaned Sikhs became the mainstay of Britain’s army in India.

Turning Point The mutiny marked a turning point in Indian history. As a result of the mutiny, in 1858 the British government took direct command of India. The term **Raj** refers to British rule after India came under the British crown during the reign of Queen Victoria. A cabinet minister in London directed policy, and a British governor-general in India carried out the government’s orders. After 1877, this official held the title of viceroy.

To reward the many princes who had remained loyal to Britain, the British promised to respect all treaties the East India Company had made with them. They also promised that the Indian states that were still free would remain independent. Unofficially, however, Britain won greater and greater control of those states.

The mutiny increased distrust between the British and the Indians. A political pamphlet suggested that both Hindus and Muslims “are being ruined under the tyranny and oppression of the . . . treacherous English.”

Reading Check

Analyze Effects

In what ways did the Sepoy Mutiny change the political climate of India?

Lesson 4 Assessment

- Organize Information** Using your notes, make a list of the key events of British imperialism in India. Then organize the events on a timeline like the one below.
- Key Terms and People** For each key term or person in the lesson, write a sentence explaining its significance.
- Draw Conclusions** Why didn’t Indians unite against the British in the Sepoy Mutiny?
- Summarize** What form did British rule take under the Raj?
- Make Inferences** How did economic imperialism lead to India’s becoming a British colony?
- Synthesize** How did imperialism contribute to unity and to the growth of nationalism in India?



European Claims in Southeast Asia

The Big Idea

Demand for Asian products drove Western imperialists to seek possession of Southeast Asian lands.

Why It Matters Now

Southeast Asian independence struggles in the 20th century have their roots in this period of imperialism.

Key Terms and People

Pacific Rim
King Mongkut

Setting the Stage

Just as the European powers rushed to divide Africa, they also competed to carve up the lands of Southeast Asia. These lands form part of the **Pacific Rim**, the countries that border the Pacific Ocean. Western nations desired the Pacific Rim lands for their strategic location along the sea route to China. Westerners also recognized the value of the Pacific colonies as sources of tropical agriculture, minerals, and oil. As the European powers began to appreciate the value of the area, they challenged each other for their own parts of the prize.

European Powers Invade the Pacific Rim

Early in the 18th century, the Dutch East India Company established control over most of the 3,000-mile-long chain of Indonesian islands. The British established a major trading port at Singapore. The French took over Indochina on the Southeast Asian mainland. The Germans claimed the Marshall Islands and parts of New Guinea and the Solomon islands.

The lands of Southeast Asia were perfect for plantation agriculture. The major focus was on sugar cane, coffee, cocoa, rubber, coconuts, bananas, and pineapple. As these products became more important in the world trade markets, European powers raced each other to claim lands.



Colonies in Southeast Asia, 1895



Interpret Maps

- 1. Location** What was Siam's location relative to the nearest European colonies?
- 2. Region** Which European country could access both the Indian and the Pacific Oceans from its colony?

Dutch Expand Control The Dutch East India Company, chartered in 1602, actively sought lands in Southeast Asia. It seized Malacca from the Portuguese and fought the British and Javanese for control of Java. The discovery of oil and tin on the islands and the desire for more rubber plantations prompted the Dutch to gradually expand their control over Sumatra, part of Borneo, Celebes, the Moluccas, and Bali. Finally the Dutch ruled the whole island chain of Indonesia, then called the Dutch East Indies.

Management of plantations and trade brought a large Dutch population to the islands. In contrast to the British, who lived temporarily in India but retired in Britain, the Dutch thought of Indonesia as their home. They moved to Indonesia and created a rigid social class system there. The Dutch were on top, wealthy and educated Indonesians came next, and plantation workers were at the bottom. The Dutch also forced farmers to plant one-fifth of their land in specified export crops.

British Take the Malayan Peninsula To compete with the Dutch, the British sought a trading base that would serve as a stop for their ships that traveled the India-China sea routes. They found a large, sheltered harbor on Singapore, an island just off the tip of the Malay Peninsula. The opening of the Suez Canal and the increased demand for tin and rubber combined to make Singapore one of the world's busiest ports.

Britain also gained colonies in Malaysia and in Burma (modern Myanmar). Malaysia had large deposits of tin and became the world's leading rubber exporter. Needing workers to mine the tin and tap the rubber trees, Britain encouraged Chinese to immigrate to Malaysia. Chinese flocked to the area. As a result of such immigration, the Malays soon became a minority in their own country. Conflict between the resident Chinese and the native Malays remains unresolved today.

French Control Indochina The French had been active in Southeast Asia since the 17th century. They even helped the Nguyen (nuh•WIN) dynasty rise to power in Vietnam. In the 1840s, during the rule of an anti-Christian Vietnamese emperor, seven French missionaries were killed. Church leaders and capitalists who wanted a larger share of the overseas market demanded military intervention. Emperor Napoleon III ordered the French army to invade southern Vietnam. Later, the French added Laos, Cambodia, and northern Vietnam to the territory. The combined states would eventually be called French Indochina.

Using direct colonial management, the French themselves filled all important positions in the government bureaucracy. They did not encourage local industry. Four times as much land was devoted to rice production. However, the peasants' consumption of rice decreased because much of the rice was exported. Anger over this reduction set the stage for Vietnamese resistance against the French.

Colonial Impact In Southeast Asia, colonization brought mixed results. Economies grew based on cash crops or goods that could be sold on the world market. Roads, harbors, and rail systems improved communication and transportation but mostly benefited European business. However, education, health, and sanitation did improve.

Unlike other colonial areas, millions of people from other areas of Asia and the world migrated to work on plantations and in the mines in Southeast Asia. The region became a melting pot of Hindus, Muslims, Christians, and Buddhists. The resulting cultural changes often led to racial and religious clashes that are still seen today.

Reading Check

Analyze Motives

Why do you think so many Chinese moved to Malaysia?

The King on Progress

Siam modernized itself under the guidance of **King Mongkut** and his son Chulalongkorn (pictured here). In a royal proclamation, King Chulalongkorn showed his understanding of the importance of progress.

“As the times and the course of things in our country have changed, it is essential to promote the advancement of all our academic and technical knowledge and to prevent it from succumbing [giving in] to competition from the outside. In order to achieve this, it is imperative to make haste in education so that knowledge and ability will increase.”

—King Chulalongkorn,
“Royal Proclamation in Education”



Analyze Historical Sources

Why do you think King Chulalongkorn believed that education could prevent competition from foreigners?

Reading Check

Summarize

How did Siam keep Britain and France at bay?

Siam Remains Independent

While its neighbors on all sides fell under the control of imperialists, Siam (present-day Thailand) maintained its independence throughout the colonial period. Siam lay between British-controlled Burma and French Indochina. France and Britain each aimed to prevent the other from gaining control of Siam. Knowing this, Siamese kings skillfully promoted Siam as a neutral zone between the two powers.

To accomplish the changes, Siam started schools, reformed the legal system, and reorganized the government. The government built its own railroads and telegraph systems and ended slavery. Because the changes came from their own government, the Siamese people escaped the social turmoil, racist treatment, and economic exploitation that occurred in other countries controlled by foreigners.

Lesson 5 Assessment

- 1. Organize Information** Which Western power do you think had the most negative impact on its colonies in Southeast Asia?
- 2. Key Terms and People** For each key term or person in the lesson, write a sentence explaining its significance.
- 3. Compare** How were the Dutch East India Trading Company and the British East India Company similar?
- 4. Analyze Effects** What changes took place in Southeast Asia as a result of colonial control?
- 5. Draw Conclusions** How did the reforms of the Siamese kings help Siam remain independent?





U.S. Economic Imperialism

The Big Idea

The United States followed an imperialist policy in the Pacific Islands and also put increasing economic and political pressure on Latin America during the 19th century.

Why It Matters Now

This policy set the stage for 20th-century relations between Latin America and the United States and encouraged U.S. imperialism in the Pacific Islands.

Key Terms and People

Emilio Aguinaldo
annexation
Queen Liliuokalani
caudillo
Monroe Doctrine
José Martí
Spanish-American War
Panama Canal
Roosevelt Corollary

Setting the Stage

Western nations desired the Pacific Rim lands for their strategic location along the sea route to China. Westerners also recognized the value of the Pacific colonies as sources of tropical agriculture, minerals, and oil. Latin America's long struggle to gain independence from colonial domination between the late 18th and the mid-19th centuries left the new nations in shambles. Farm fields had been neglected and were overrun with weeds. Buildings in many cities bore the scars of battle. Some cities had been left in ruins. The new nations of Latin America faced a struggle for economic and political recovery that was every bit as difficult as their struggle for independence had been.



A Brazilian plantation at the roadstead of Rio de Janeiro (1830)

U.S. Imperialism in the Pacific Islands

Because Americans had fought for their independence from Britain, most of them disliked the idea of colonizing other nations. However, two groups of Americans were outspoken in their support of imperialism. One group of ambitious empire builders felt the United States should fulfill its destiny as a world power, colonizing like the Europeans. The other group, composed of business interests, welcomed the opening of new markets and trade possibilities.



10.4.1; 10.4.2; 10.4.3; 10.4.4; HREP.4



This photograph shows American soldiers fighting the Filipino nationalists following the U.S. annexation of the Philippines.

The Philippines Change Hands The United States acquired the Philippine Islands, Puerto Rico, and Guam as a result of the Spanish-American War in 1898. Gaining the Philippines touched off a debate in the United States over imperialism. President McKinley’s views swayed many to his side. He told a group of Methodist ministers his intention to “educate Filipinos, and uplift and Christianize them.”

Filipino nationalists were not happy to trade one colonizer—the Spanish—for another, the Americans. **Emilio Aguinaldo** (eh•MEE•lyoh-AH•gee•NAHL•doh), leader of the Filipino nationalists, claimed that the United States had promised immediate independence after the Spanish-American War ended. The nationalists declared independence and established the Philippine Republic.

The United States plunged into a fierce struggle with the Filipino nationalists in 1899 and defeated them in 1902. The United States promised the Philippine people that it would prepare them for self-rule. To achieve this goal, the United States built roads, railroads, and hospitals, and set up school systems. However, as with other Southeast Asian areas, businessmen encouraged growing cash crops such as sugar at the expense of basic food crops. This led to food shortages for the Filipinos.

Hawaii Becomes a Republic U.S. interest in Hawaii began around the 1790s when Hawaii was a port on the way to China and East India. Beginning about the 1820s, sugar trade began to change the Hawaiian economy. Americans established sugarcane plantations and became highly

Queen Liliuokalani

(1838–1917)

Liliuokalani was Hawaii's only queen and the last monarch of Hawaii. She bitterly resented her brother's loss of power to American planters and worked to regain power for the Hawaiian monarchy. As queen, she refused to renew a treaty signed by her brother that would have given commercial privileges to foreign businessmen. It was a decision that would cost her the crown.



successful. By the mid-19th century, American sugar plantations accounted for 75 percent of Hawaii's wealth. At the same time, American sugar planters also gained great political power in Hawaii.

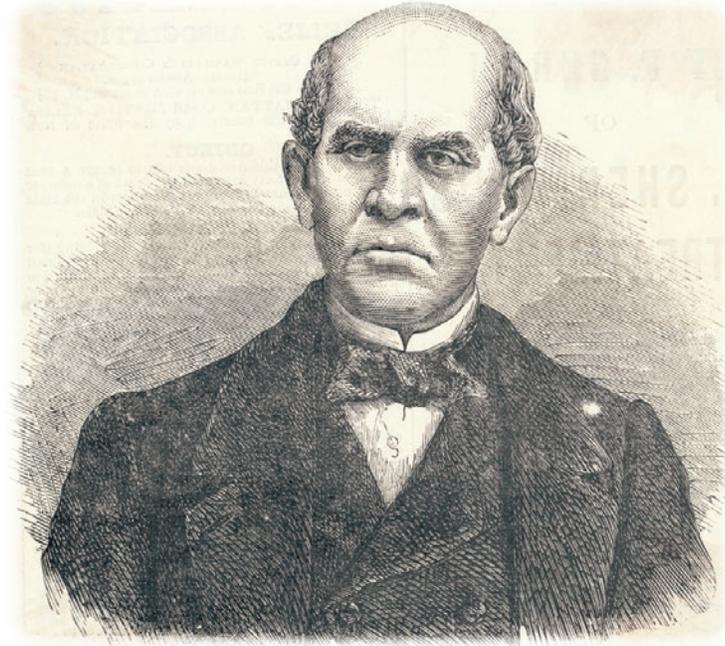
Then in 1890, the McKinley Tariff Act passed by the U.S. government set off a crisis in the islands. The act eliminated the tariffs on all sugar entering the United States. Now, sugar from Hawaii was no longer cheaper than sugar produced elsewhere. That change cut into the sugar producers' profits. Some U.S. business leaders pushed for **annexation** of Hawaii, or the adding of the territory to the United States. Making Hawaii a part of the United States meant that Hawaiian sugar could be sold for greater profits because American producers got an extra two cents a pound from the U.S. government.

About the same time, the new Hawaiian ruler, **Queen Liliuokalani** (luh•LEE•uh•oh•kuh•LAH•nee), took the throne. In 1893, she called for a new constitution that would increase her power. It would also restore the political power of Hawaiians at the expense of wealthy planters. To prevent this from happening, a group of American businessmen hatched a plot to overthrow the Hawaiian monarchy. In 1893, Queen Liliuokalani was removed from power.

In 1894, Sanford B. Dole, a wealthy plantation owner and politician, was named president of the new Republic of Hawaii. The president of the new republic asked the United States to annex it. At first, President Cleveland refused. In 1898, however, the Republic of Hawaii was annexed by the United States.

The period of imperialism was a time of great power and domination of others by mostly European powers. As the 19th century closed, the lands of the world were all claimed. The European powers now faced each other with competing claims. Their battles would become the focus of the 20th century.

Reading Check
Compare and Contrast How were the independence movements in the Pacific Islands similar to and different from the struggle for independence in the United States?



Argentine reformer Domingo Sarmiento

Latin America After Independence

Political independence meant little for most citizens of the new Latin American nations. The majority remained poor laborers caught up in a cycle of poverty.

Colonial Legacy Both before and after independence, most Latin Americans worked for large landowners. The employers paid their workers with vouchers that could be used only at their own supply stores. Since wages were low and prices were high, workers went into debt. Their debt accumulated and passed from one generation to the next. In this system known as peonage, “free” workers were little better than slaves.

Landowners, on the other hand, only got wealthier after independence. Many new Latin American governments took over the lands owned by native peoples and by the Catholic Church. Then they put those lands up for sale. Wealthy landowners were the only people who could afford to buy them, and they snapped them up. But as one Argentine newspaper reported, “Their greed for land does not equal their ability to use it intelligently.” The unequal distribution of land and the landowners’ inability to use it effectively combined to prevent social and economic development in Latin America.

Political Instability Political instability was another widespread problem in 19th-century Latin America. Many Latin American army leaders had gained fame and power during their long struggle for independence. They often continued to assert their power. They controlled the new nations as military dictators, or **caudillos** (kaw•DEEL•yohz). They were able to hold on to power because they were backed by the military. By the mid-1800s, nearly all the countries of Latin America were ruled by caudillos. One typical caudillo was Juan Vicente Gómez.



Workers unload coffee beans at a plantation in Brazil. Until recently, Brazil's economy depended heavily on the export of coffee.

Reading Check
Identify Problems
What difficulties did lower-class Latin Americans continue to face after independence?

He was a ruthless man who ruled Venezuela for nearly 30 years after seizing power in 1908. "All Venezuela is my cattle ranch," he once boasted.

There were some exceptions, however. Reform-minded presidents, such as Argentina's Domingo Sarmiento, made strong commitments to improving education. During Sarmiento's presidency, between 1868 and 1874, the number of students in Argentina doubled. But such reformers usually did not stay in office long. More often than not, a caudillo, supported by the army, seized control of the government.

The caudillos faced little opposition. The wealthy landowners usually supported them because they opposed giving power to the lower classes. In addition, Latin Americans had gained little experience with democracy under European colonial rule. So, the dictatorship of a caudillo did not seem unusual to them. But even when caudillos were not in power, most Latin Americans still lacked a voice in the government. Voting rights—and with them, political power—were restricted to the relatively few members of the upper and middle classes who owned property or could read.

Economies Grow Under Foreign Influence

When colonial rule ended in Latin America in the early 1800s, the new nations were no longer restricted to trading with colonial powers. Britain and, later, the United States became Latin America's main trading partners.

Old Products and New Markets Latin America's economies continued to depend on exports, no matter whom they were trading with. As during the colonial era, each country concentrated on one or two products. With advances in technology, however, Latin America's exports grew. The development of the steamship and the building of railroads in the 19th century, for example, greatly increased Latin American trade. Toward the end of the century, the invention of refrigeration helped increase Latin America's exports. The sale of beef, fruits and vegetables, and other perishable goods soared.

But foreign nations benefited far more from the increased trade than Latin America did. In exchange for their exports, Latin Americans imported European and North American manufactured goods. As a result, they had little reason to develop their own manufacturing industries. And as long as Latin America remained unindustrialized, it could not play a leading role on the world economic stage.

Outside Investment and Interference Furthermore, Latin American, including South American, countries used little of their export income to build roads, schools, or hospitals. Nor did they fund programs that would help them become self-sufficient. Instead, they often borrowed money at high interest rates to develop facilities for their export industries. Countries such as Britain, France, the United States, and Germany were willing lenders. The Latin American countries often were unable to pay back their loans, however. In response, foreign lenders sometimes threatened to collect the debt by force. At other times, they threatened to take over the facilities they had funded. In this way, foreign companies gained control of many Latin American industries. This began a new age of economic colonialism in Latin America.

A Latin American Empire

Long before the United States had any economic interest in Latin American countries, it realized that it had strong links with its southern neighbors. Leaders of the United States were well aware that their country's security depended on the security of Latin America.

The Monroe Doctrine Most Latin American colonies had gained their independence by the early 1800s. But their position was not secure. Many Latin Americans feared that European countries would try to reconquer the new republics. The United States, a young nation itself, feared this, too. So, in 1823, President James Monroe issued what came to be called the **Monroe Doctrine**. This document stated that "the American continents . . . are henceforth not to be considered as subjects for future

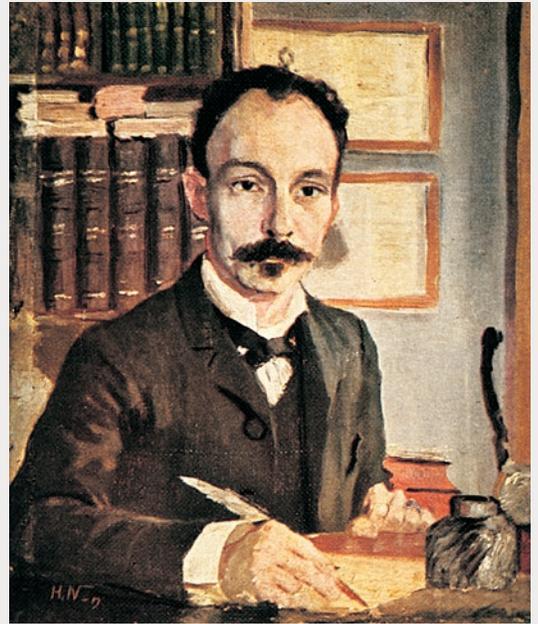
Reading Check
Analyze Effects
How did technology
affect Latin American
economies?

José Martí

(1853–1895)

José Martí was only 15 in 1868 when he first began speaking out for Cuban independence. In 1871, the Spanish colonial government punished Martí's open opposition with exile. Except for a brief return to his homeland in 1878, Martí remained in exile for about 20 years. For most of this time, he lived in New York City. There he continued his career as a writer and a revolutionary. "Life on earth is a hand-to-hand combat . . . between the law of love and the law of hate," he proclaimed.

While in New York, Martí helped raise an army to fight for Cuban independence. He died on the battlefield only a month after the war began. But Martí's cry for freedom echoes in his essays and poems and in folk songs about him that are still sung throughout the world.



colonization by any European powers." Until 1898, though, the United States did little to enforce the Monroe Doctrine. Cuba provided a real testing ground.

Cuba Declares Independence The Caribbean island of Cuba was one of Spain's last colonies in the Americas. In 1868, Cuba declared its independence and fought a ten-year war against Spain. In 1878, with the island in ruins, the Cubans gave up the fight. But some Cubans continued to seek independence from Spain. In 1895, **José Martí**, a writer who had been exiled from Cuba by the Spanish, returned to launch a second war for Cuban independence. Martí was killed early in the fighting, but the Cubans battled on.

By the mid-1890s, the United States had developed substantial business holdings in Cuba. Therefore it had an economic stake in the fate of the country. In addition, the Spanish had forced many Cuban civilians into concentration camps. Americans objected to the Spanish brutality. In 1898, the United States joined the Cuban war for independence. This conflict, which became known as the **Spanish-American War**, lasted about four months. U.S. forces launched their first attack not on Cuba but on the Philippine Islands, a Spanish colony thousands of miles away in the Pacific. Unprepared for a war on two fronts, the Spanish military quickly collapsed.

In 1901, Cuba became an independent nation, at least in name. However, the United States installed a military government and continued to exert control over Cuban affairs. This caused tremendous resentment among many Cubans, who had assumed that the United States' aim in

The Spanish-American War, 1898: the Caribbean



The Spanish-American War, 1898: the Philippines



Interpret Maps

1. **Location** Where is Cuba located in relation to the United States?
2. **Place** In the war, the United States launched its first attack against the Philippine Islands. Why might this have surprised the Spanish?

intervening was to help Cuba become truly independent. The split that developed between the United States and Cuba at this time continues to keep these close neighbors miles apart more than a century later.

Connecting the Oceans After Spain’s defeat in the Spanish-American War, the United States was the dominant imperial power in Latin America and next set its sights on Panama. Latin Americans were beginning to regard the United States as the political and economic “Colossus of the North.” The United States was a colossus in geographic terms, too. By the 1870s, the transcontinental railroad connected its east and west coasts. But land travel still was time consuming and difficult. And sea travel between the coasts involved a trip of about 13,000 miles around the tip of South America. If a canal could be dug across a narrow section of Central America, however, the coast-to-coast journey would be cut in half.

The United States had been thinking about such a project since the early 19th century. In the 1880s, a French company tried—but failed—to build a canal across Panama. Despite this failure, Americans remained enthusiastic about the canal. And no one was more enthusiastic than President Theodore Roosevelt, who led the nation from 1901 to 1909. In 1903, Panama was a province of Colombia. Roosevelt offered that country \$10 million plus a yearly payment for the right to build a canal. When

the Colombian government demanded more money, the United States responded by encouraging a revolution in Panama. The Panamanians had been trying to break away from Colombia for almost a century. In 1903, with help from the United States Navy, they won their country's independence. In gratitude, Panama gave the United States a ten-mile-wide zone in which to build a canal.

For the next decade, American engineers contended with floods and withering heat to build the massive waterway. However, their greatest challenge was the disease-carrying insects that infested the area. The United States began a campaign to destroy the mosquitoes that carried yellow fever and malaria and the rats that carried bubonic plague. The effort to control these diseases was eventually successful. Even so, thousands of workers died during construction of the canal. The **Panama Canal** finally opened in 1914. Ships from around the world soon began to use it. Latin America had become a crossroads of world trade. And the United States controlled the tollgate.

The Roosevelt Corollary The building of the Panama Canal was only one way that the United States expanded its influence in Latin America in the early 20th century. Its presence in Cuba and its large investments in



This cartoon suggests that the Roosevelt Corollary turned the Caribbean into a U.S. wading pool.

Panama Canal

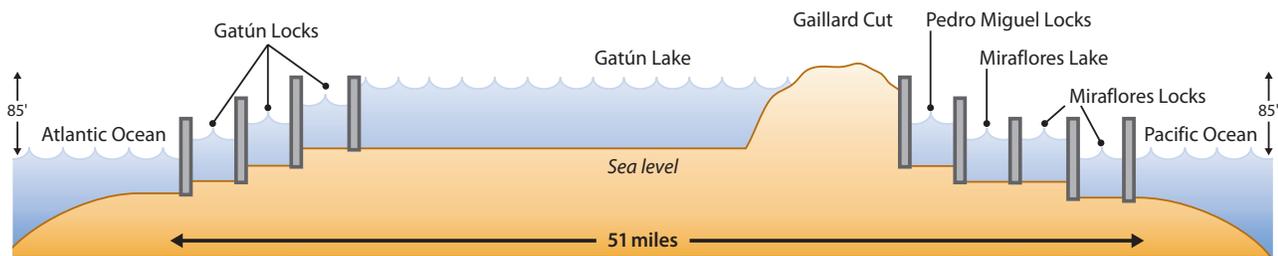
The Panama Canal is considered one of the world's greatest engineering accomplishments. Its completion changed the course of history by opening a worldwide trade route between the Atlantic and Pacific Oceans. As shown in the diagram, on entering the canal, ships are raised about 85 feet in a series of three locks. On leaving the canal, ships are lowered to sea level by another series of three locks.

The canal also had a lasting effect on other technologies. Since the early 1900s, ships have been built to dimensions that will allow them to pass through the canal's locks.



Ships passing through the Pedro Miguel Locks

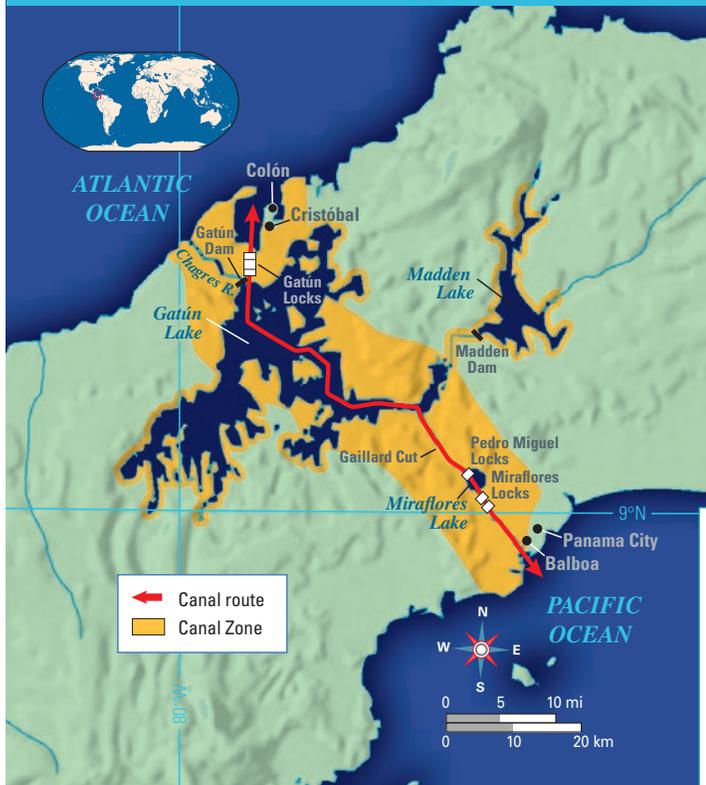
Panama Canal Cross-section



This cross-section shows the different elevations and locks that a ship moves through on the trip through the canal.

[Explore ONLINE!](#)

Panama Canal



Canal Facts

- The canal took ten years to build (1904–1914) and cost \$380 million.
- During the construction of the canal, workers dug up more than 200 million cubic yards of earth.
- Thousands of workers died from diseases while building the canal.
- The trip from San Francisco to New York City via the Panama Canal is about 9,000 miles shorter than the trip around South America.
- The 51-mile trip through the canal takes 8 to 10 hours.
- The canal now handles more than 13,000 ships a year from around 70 nations carrying 192 million short tons of cargo.
- Panama took control of the canal on December 31, 1999 and began expanding it in 2007.

Critical Thinking

- 1. Identify Problems** What difficulties did workers face in constructing the canal?
- 2. Evaluate** In the more than 100 years since it was built, do you think that the benefits of the Panama Canal to world trade have outweighed the costs in time, money, and human life? Explain your answer.

many Central and South American countries strengthened its foothold. To protect those economic interests, in 1904, President Roosevelt issued a corollary, or extension, to the Monroe Doctrine. The **Roosevelt Corollary** gave the United States the right to be “an international police power” in the Western Hemisphere.

The United States used the Roosevelt Corollary many times in the following years to justify U.S. intervention in Latin America. U.S. troops occupied some countries for decades. Many Latin Americans protested this intervention, but they were powerless to stop their giant neighbor to the north. The U.S. government simply turned a deaf ear to their protests. It could not ignore the rumblings of revolution just over its border with Mexico, however.

Reading Check

Analyze Motives

Why was the United States so interested in building the Panama Canal?

Lesson 6 Assessment

1. **Organize Information** Write the events that you think were most beneficial to Latin America on the timeline.



2. **Key Terms and People** For each key term or person in the lesson, write a sentence explaining its significance.
3. **Summarize** Why did the gap between rich and poor in Latin America grow after independence?

4. **Analyze Effects** What economic gains and setbacks did Latin American countries experience after independence?
5. **Make Inferences** Why was the United States so interested in the security of Latin America?
6. **Contrast** How was the principle of the Roosevelt Corollary different from that of the Monroe Doctrine?

Module 9 Assessment

Key Terms and People

For each term or name below, briefly explain its connection to the imperialism of 1850–1914.

1. imperialism
2. Berlin Conference
3. Menelik II
4. Social Darwinism
5. Shaka
6. Suez Canal
7. Raj
8. Queen Liliuokalani
9. Monroe Doctrine
10. Spanish-American War

Main Ideas

Use your notes and the information in the module to answer the following questions.

The Roots of Imperialism

1. What motivated the nations of Europe to engage in imperialist activities? Cite specific text evidence to support your answer.
2. What effect did the Boer War have on Africans?

Imperialism in Africa

3. What are the forms of imperial rule?
4. How did Ethiopia successfully resist European rule?

Europeans Claim Muslim Lands

5. Why were the European nations interested in controlling the Muslim lands?
6. What methods did the Muslim leaders use to try to prevent European imperialism?

British Imperialism in India

7. How was the economy of India transformed by the British?
8. What caused the Sepoy Mutiny?

European Claims in Southeast Asia

9. How did Siam manage to remain independent while other countries in the area were being colonized?
10. Why did Southeast Asia become an ethnically diverse region during the colonial era?

U.S. Economic Imperialism

11. How were Latin American caudillos able to achieve power and hold on to it?
12. What effects did the Monroe Doctrine and the Roosevelt Corollary have on Latin America?

Module 9 Assessment, continued

Critical Thinking

1. **Summarize** How did the local people in Africa, India, and Southeast Asia resist the demands of the Europeans?
2. **Analyze Effects** What effects did imperialism have on the economic life of the lands and people colonized by the European imperialists?
3. **Draw Conclusions** Why do you think the British viewed the Suez Canal as the lifeline of their empire?
4. **Synthesize** What positive and negative impact did inventions such as the railroad and the steamship have on the land and people conquered by the imperialists?
5. **Develop Historical Perspectives** What economic, political, and social conditions encouraged the growth of imperialism in Africa and Asia?
6. **Evaluate** How did the decline of the Ottoman Empire contribute to the increasing power of European nations?
7. **Compare and Contrast** Investigate the resistance in the Sudan, and compare it to the resistance by the Ashanti. How were they similar or different?

Engage with History

In the feature Views of Imperialism, you read different primary sources that revealed distinct perspectives on European imperialism. Analyze the evolution of perspectives into contemporary times by researching and examining one or two secondary sources on the topic. Consider the following questions:

- Does the author make implicit or explicit philosophical assumptions?
- What beliefs does the author express or assert?
- Does the author show a bias on the topic?
- What is the nature of the author's historical interpretation of the topic?

- Does the author use facts and evidence to support his or her argument?
- Does the author use facts and evidence to refute another argument?

Discuss these questions in a small group. Then evaluate the authors' interpretations of European imperialism, considering their use of fact versus opinion, multiple perspectives, and causes and effects.

Focus on Writing

Write a magazine **feature article** about the effects of colonization. Be sure to address the following points:

- Provide some background and facts on the country you're writing about.
- Tell where the colonizers have come from.
- Describe how the colonizers treat the colonized people.
- Include quotations from both the colonizers and the colonized.
- Draw conclusions about each side's opinion of the other.

Read your feature article aloud while a partner or small group is listening. Ask them to call out any word, phrases, or concepts that are unfamiliar to them. Provide clarifications as needed.

Multimedia Activity

Compare British and French imperialism in Africa and Asia by examining

- the influence of geography;
- natural resources;
- their policies.

Write interview questions for both British and French political leaders of the time.

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