

Chapter 27

The Age of Imperialism

The Storyteller

No one knows how the rumor started, but it spread quickly. The bullets for the new rifles, the story went, were greased with the fat of cows and pigs. The sepoy, Indian soldiers in the British army, were outraged. Because Hindus regarded the cow as sacred and Muslims could not touch pork, using these bullets would violate the beliefs of both groups. As a result, the sepoys started a rebellion in May 1857 that soon engulfed much of India.

The Indian Revolt of 1857 was not an isolated incident. As European powers acquired new territories in the 1800s, conflicts between colonial rulers and colonial peoples developed. By the early 1900s European nations ruled large parts of Asia and Africa, while the United States was expanding interests in Latin America.

Historical Significance

How did the spread of empires affect peoples in Asia, Africa, and Latin America? How did colonial peoples respond to Western rule?

Section 1

Pressures for Expansion

The term **imperialism** is a Latin word from the days of the Roman Empire. Imperialism means one country's domination of the political, economic, and social life of another country. About 2,000 years ago, imperial Rome controlled most of the Mediterranean world. By the end of the 1800s, a handful of European countries, together with the United States, controlled nearly the entire world. Not surprisingly, the era between 1800 and 1914 has come to be known as the Age of Imperialism.

The imperialism of the 1800s resulted from three key factors. First, nationalism prompted rival European nations to build empires in their competitive quests for power. Second, the Industrial Revolution created a tremendous demand for raw materials and expanded markets, which prompted industrialized nations to seek new territories. Finally, both religious fervor and feelings of racial and cultural superiority inspired Europeans to impose their cultures on distant lands.

Political Rivalries

In the mid-1800s European countries saw themselves as actors on the world stage, and each country wanted to play a starring role. If Great Britain started a small colony in distant Asia or Africa, France had to start one too—and so did Belgium, Germany, Italy, Holland, Spain, Portugal, and Russia.

Once begun, the quest for colonies became a continuing enterprise that seemed to have no limits. Slow and difficult communication between remote territories and European capitals often enabled colonial governors and generals to take matters into their own hands. If a colony's borders did not

provide military security, for instance, military officials based in the colony used their armies to expand the colony's borders. This strategy worked well enough until colonial governments started claiming the same territories. Then new conflicts arose, and European troops found themselves facing off on remote battlefields in Africa and Asia.

Desire for New Markets

The Industrial Revolution of the 1800s knew no borders. Factories in Europe and the United States consumed tons of raw materials and churned out thousands of manufactured goods. The owners and operators of these factories searched constantly for new sources of raw materials and new markets for their products. They hoped to find both in foreign lands.

Rubber, copper, and gold came from Africa, cotton and jute from India, and tin from Southeast Asia. These raw materials spurred the growth of European and American industries and financial markets, but they represented only the tip of the iceberg. Bananas, oranges, melons, and other exotic fruits made their way to European markets. People in Paris, London, and Berlin drank colonial tea, coffee, and cocoa with their meals and washed themselves with soap made from African palm oil.

The colonies also provided new markets for the finished products of the Industrial Revolution. Tools, weapons, and clothing flowed out of the factories and back to the colonies whose raw materials had made them possible.

Seeking New Opportunities

Imperialism involved more than just guns, battles, raw materials, and manufactured goods. Colonies needed people who were loyal to the imperialist country. Great Britain, France, and Germany needed British, French, and German citizens to run their newly acquired territories and keep them productive.

Throughout the 1800s European leaders urged their citizens to move to far-off colonies. Many of them responded. In the 1840s, for example, thousands of French citizens sailed across the Mediterranean Sea to **Algeria**, where they started farms and estates on lands seized from local Algerian farmers.

The British, meanwhile, emigrated to the far corners of the globe, hoping to find opportunities not available at home. Many rushed to **Australia** and **New Zealand** in the 1850s in search of gold. As the British government continued to acquire vast tracts of land in Africa, Asia, and the Pacific, the phrase "the sun never sets on the British Empire" became a popular way of describing Great Britain's vast holdings.

Strong-minded individuals saw emigration as a chance to strike it rich or make a name for themselves. Perhaps the most spectacular success story of the era belonged to **Cecil Rhodes**, a British adventurer who made a fortune from gold and diamond mining in southern Africa. Rhodes went on to found a colony that bore his name: **Rhodesia** (now **Zimbabwe**).

“Civilizing” Mission

Some emigrants had motives that went beyond mere personal glory and profit. Religious and humanitarian impulses inspired many individuals to leave their secure lives at home and head for the distant colonies. The desire to spread Western technology, religion, customs and traditions also fueled colonial expansion.

During the Age of Imperialism, growing numbers of Catholic and Protestant missionaries decided to bring the Christian message to the most remote corners of Africa and Asia. Over the decades they set up hundreds of Christian missions and preached to thousands of Africans and Asians throughout these two continents. Like many other Europeans and Americans of this period, these missionaries believed that Christianity and Western civilization together could benefit and transform the world.

The missionaries were not military conquerors, but they did try to change people’s beliefs and practices. They believed that, in order to become “civilized,” the people of Africa and Asia would have to reject their old religions and convert to Christianity. To achieve this goal, missionaries built churches and taught Christian doctrine. Missionaries often set up schools and hospitals as well.

Other Europeans also believed that Western civilization was superior to the civilizations of colonial peoples. As a result, some colonial officials tried to impose Western customs and traditions on the people they conquered. These officials insisted that their colonial subjects learn European languages, and they encouraged Western lifestyles as well. They also discouraged colonial peoples from practicing traditional customs and rituals.

Some Europeans seized on the theory of social Darwinism as proof of their cultural superiority. This theory adapted Darwin’s ideas about the evolution of animals—particularly his notion of “the survival of the fittest”—to explain differences among human beings. Social Darwinists believed that white Europeans were the “fittest” people in the world and that Western nations had a duty to spread Western ideas and traditions to “backward” peoples living overseas.

In 1899 the British writer **Rudyard Kipling** captured the essence of the imperialist attitude in his famous poem “The White Man’s Burden.” Kipling addressed the poem to the United States, which at this time had just begun to acquire and govern colonies of its own:

*Take up the White Man’s burden—
Send forth the best ye breed—
Go bind your sons to exile
To serve your captives’ need;
To wait in heavy harness
On fluttered folk and wild—
Your new-caught, sullen peoples,
Half-devil and half-child.*

Forms of Imperialism

Imperial nations gained new lands through treaties, purchases, and military conquest. Once in power, they used several forms of territorial control. The first of these, a **colony**, was a territory that an imperial power ruled directly through colonial officials. A **protectorate** had its own government, but its policies were guided by a foreign power. A **sphere of**

influence was a region of a country in which the imperial power had exclusive investment or trading rights.

Within these general forms of control, each imperial nation exercised its power differently. For example, the French used their colonial officials not only to govern but to spread French culture and to make territories overseas extensions of France. The British, by contrast, focused strictly on administration and were less inclined to convert colonial people to British ways. In many cases, the British allowed local rulers to govern territories as their representatives.

Section 2

The Partition of Africa

Until the 1800s Europeans knew little of Africa beyond its northern, western, and southern coasts. Then, in the mid-1800s, a few brave explorers began to venture into the African interior. The most famous of these was Scottish doctor and missionary **David Livingstone**, who first went to Africa in 1840. For the next 30 years, Livingstone explored wide tracts of the central and eastern Africa, setting up Christian missions and sending back to Great Britain detailed reports of his discoveries, such as Victoria Falls.

When Europeans temporarily lost touch with Livingstone late in the 1860s, the *New York Herald* hired a

British journalist and explorer named Henry M. Stanley to track him down. Their famous meeting in 1871 is best remembered for Stanley's understated greeting, "Dr. Livingstone, I presume?" With help from European financial backers, Stanley went on to lead several major expeditions through central Africa himself.

The publicity surrounding the explorations of Livingstone and Stanley generated new interest in Africa throughout Europe. This interest swelled when subsequent explorers sent back excited reports about the continent's abundance of resources. Reports such as these helped set off a mad European scramble for Africa between 1880 and 1914. One European country after another laid claim to parts of Africa. In 1885, 14 nations met in Berlin, Germany, and agreed to **partition**, or divide, the prize King Leopold II of Belgium called "this magnificent African cake." By 1914 European nations controlled 90 percent of the continent.

North Africa

The world's largest desert—the Sahara—stretches across North Africa from the Atlantic Ocean to the Red Sea. Most of the people in North Africa live on a thin strip of land located north of the Sahara along the Mediterranean coast. Here the land is fertile and the climate is mild. In the early 1800s Muslim Arabs under the authority of the Ottoman ruler in Istanbul governed the large territories west of Egypt, which at that time were called Tripoli, Tunis, and Algiers. Today Tripoli, Tunis, and Algiers are the independent North African countries of Libya, Tunisia, and Algeria.

The French in North Africa

In 1830 King Charles X of France ordered an invasion of Algiers with the aim of colonizing that country. French troops encountered stiff resistance from the Algerians, whose leader was **Abd al-Qadir** (AB-duhl KAH-duhr). About 10 years passed before 100,000 French soldiers finally subdued the determined Algerians. After conquering Algiers, the French seized neighboring Tunis in 1881 and secured special rights in **Morocco** in 1904. About 1 million French people settled in North Africa during these years of struggle.

Britain and Egypt

During the early 1800s, Ottoman **Egypt** was virtually independent under its governor, **Muhammad Ali**. Muhammad Ali's armies conquered neighboring lands, making Egypt a power in the eastern Mediterranean. To modernize Egypt, Ali reformed tax and land systems, encouraged industry, and supported irrigation projects to boost cotton production. Under Ali's successors, however, Egypt's debts rose along with European influence.

In 1859 a French entrepreneur, Ferdinand de Lesseps, set up a company to build the Suez Canal. Joining the Mediterranean and Red Seas, this waterway became a vital shortcut between Europe and Asia and was especially valued by the British as an important link to India. In 1875 Great Britain gained effective control of the canal when Egypt sold its canal shares to the British to pay off its debts. During the next few years, British influence increased over Egypt. In 1882 British forces put down a revolt led by nationalist leader Ahmed Arabi, and Egypt became a British protectorate.

Meanwhile, in **the Sudan**, south of Egypt, a Muslim revival stirred nationalist feelings. Since the 1880s, the Sudanese, under their leader the Mahdi, had challenged British expansion. In 1898, however, British forces, using Maxim machine guns, defeated the more simply armed Sudanese army at the Battle of Omdurman. Soon after the battle, the British also confronted a French force at Fashoda, bringing Great Britain and France to the brink of war. In the end, the French withdrew their army and their claim to the Sudan when the British recognized French control of Morocco.

Italy Seizes Libya

Libya lies between Egypt on the east and Algeria and Tunisia on the west. Known as Tripoli in the 1800s, the country had almost no economy value, but it was coveted by Italy, the nearest European nation. Entering the imperialist race late, Italy was eager to establish an African empire. After seeking guarantees of neutrality from other European nations, Italy in 1911 declared war on the Ottoman Empire, which ruled Tripoli. Italy easily defeated the Ottoman Turks and took Tripoli as a colony, naming it Libya. Libya was the last country in North Africa to be conquered by European nations.

West, Central, and East Africa

West, Central, and East Africa have varied landscapes: mountains, plains, deserts, and rain forests. During the 1800s, these regions consisted of many territories, each with its own history and traditions. Europeans, however, exploited the

Africans' lack of political unity and swallowed up most of these lands in the late 1800s.

West Africa

In the 1500s and 1600s Europeans traded along the coasts of Africa. From West African trading posts, they carried out the transatlantic slave trade that provided labor for plantations and mines in the Americas. West African states traded salt, gold, and iron wares with the Europeans, but some local rulers also supplied prisoners of war to the slave trade.

During the early 1800s, many Western nations declared an end to the slave trade and abolished slavery. Slave trading, however, continued as Arab and African traders sent people from Central and East Africa to perform slave labor in the Middle East and Asia. Meanwhile, West African states, weakened by the population losses of the slave trade, traded natural products, such as palm oil, ivory, rubber, cotton, and cacao beans, for European manufactured goods.

To control this trade and to expand their coastal holdings, European nations began to push inland in the 1870s. Before this time, Europeans had avoided inland Africa because of the difficult terrain and deadly diseases, such as malaria. In the late 1800s, the discovery of the natural ingredient, quinine, to fight malaria and the use of steamships for river transportation made European exploration of inland Africa easier. By 1900, European powers, especially Great Britain and France, had acquired vast new territories in West Africa.

European expansion, however, did not go unchallenged. In the 1890s West African rulers, such as **Samory Touré** (sah-MOHR-ree too-RAY) and Behazin, led armies against the French. In the Gold Coast, the Ashanti queen Yaa Asantewaa rallied her people against British expansion. All of these

efforts were defeated by well-armed European forces. By 1900, **Liberia** was the only remaining independent state in West Africa. Established in 1822 by free African Americans, Liberia became a republic in 1847. Its ties to the United States made it off limits to European expansion.

Central and East Africa

In 1877 the explorer Henry M. Stanley reached the mouth of the Congo River. He later described the river as a "grand highway of commerce to ... Central Africa." As a result of Stanley's exploration, Belgium's King Leopold II claimed the Congo region as his own private plantation. He enslaved the Congolese people and had them cut down forests for rubber trees and kill elephant herds for ivory tusks. In pursuing his ambitions, Leopold stripped the Congo of many people and resources.

Leopold's brutal control of the Congo lasted about 20 years, despite the world's outrage. In 1908 he finally agreed to give his plantation to the Belgian government in return for a large loan. Thus, in that year, the Congo region owned by Leopold became the Belgian Congo.

While the Belgians were claiming the Congo Basin, the British, the Germans, and the Italians were doing the same in East Africa. The only country in East Africa to remain independent during this period was **Ethiopia**, located in a remote region known as the Horn of Africa. Beginning in the 1880s, Italy tried to conquer this country, but the Italians underestimated the determination of their opponent, Ethiopia's Emperor **Menelik II**. As emperor, Menelik had conquered many small kingdoms and reunified the Ethiopian Empire.

When the Italians attacked Ethiopia in 1896, Menelik's well-trained forces crushed the invaders at the battle of Adowa.

His victory was so devastating that no Europeans dared invade his country again during his lifetime. Ethiopia and Liberia were the only two African nations to escape European domination completely during the Age of Imperialism.

Southern Africa

Dutch settlers came to southern Africa in 1652 and established the port of Cape Town. For the next 150 years, **the Afrikaners**, as these settlers came to be called, conquered the lands around the port. The lands they eventually acquired became known as Cape Colony.

Before construction of the Suez Canal, the quickest sea route to Asia from Europe was around the Cape of Good Hope at the southern tip of Africa. Sensing the strategic value of Cape Colony, the British seized it during the Napoleonic Wars in the early 1800s. The Afrikaners resented British rule, particularly the laws that forbade the enslaving of black Africans. The white Afrikaners believed that they were superior to black Africans and that God had ordained slavery.

In the 1830s about 10,000 Afrikaners, whom the British called *Boers* (the Dutch word for “farmers”), decided to leave Cape Colony rather than live under British rule. In a move known as the Great Trek, the Afrikaners migrated northeast into the interior. Here they established two independent republics, the Transvaal and the Orange Free State. The constitution of the Transvaal stated, “There shall be no equality in State or Church between white and black.”

The Afrikaners fought constantly with their neighbors. First they battled the powerful Zulu nation for control of the land. Under their king **Shaka**, the Zulu in the early 1800s had conquered a large empire in southern Africa. The Zulu and

Boers were unable to win a decisive victory. Finally, in 1879, the British became involved in battles with the Zulu. Under their king, Cetywayo, the Zulu at first defeated British forces. With guns and greater numbers, however, the British eventually destroyed the Zulu Empire.

Conflict also developed between the British and the Boers. During the 1880s, British settlers moved into the Boer-ruled Transvaal in search of gold and diamonds. Eager to acquire this mineral wealth for Great Britain, Cecil Rhodes—now prime minister of Cape colony—and some other British leaders wanted all of South Africa to come under British rule. They began pressuring the Boers to grant civil rights to the British settlers in the Transvaal. Growing hostility between the British and the Boers finally erupted in 1899 into the Anglo-Boer War, which the British won three years later.

In 1910 Great Britain united the Transvaal, the Orange Free State, Cape Colony, and Natal into the **Union of South Africa**. The constitution of this British domain made it nearly impossible for nonwhites to win the right to vote. As one black African writer of the time said, “The Union is to be a Union of two races, namely the British and the Afrikaners—the African is to be excluded.”

Racial equality became a dominant issue in South African affairs after the formation of the Union. Several nonwhite South African groups tried to advance their civil rights against the white minority government. Mohandas K. Gandhi, a lawyer from India, worked for equality for Indians in South Africa. He urged the Indians to disobey the laws that discriminated against them. Gandhi’s efforts brought some additional rights for the Indian community.

South Africa’s black majority also was stirred into action against racial injustices. In 1912 black South Africans founded the South African Native National Congress

(SANNC). The SANNC's goal was to work for black rights in South Africa. In 1923 the SANNC shortened its name to the African National Congress (ANC).

Effects of Imperialism

Imperialism had profound effects on Africa. These effects varied from colony to colony, but they centered mainly on economic and social life. The imperialists profited from the colonies by digging mines, starting plantations, and building factories and ports. They hired Africans at low wages and imposed taxes that had to be paid in cash. Men were often housed in dormitories away from their families and subjected to brutal discipline.

Schools set up by Europeans taught Africans that European ways were the best. In some cases, African traditions declined, although most Africans held on to their cultures while accepting some European ways. For example, many Africans came to accept some form of Christianity.

By the early 1900s, a western-educated elite had emerged in many European colonies in Africa. These Africans condemned imperialism as contrary to western ideals of liberty and equality. They founded nationalist groups to push for self-rule. By the end of the twentieth century, Africa's peoples had won their political independence from European rule.

Section 3

The Division of Asia

In his book *Description of the World*, written in 1298, Italian explorer Marco Polo relates the many stories he heard about Zipangu, an East Asian island with a supposedly inexhaustible supply of gold. Polo never did visit Zipangu, now called Japan, but his description of its imagined treasures, and of the Asian riches he did see, inspired generations of Europeans. They looked eastward to Asia, dreaming of wealth.

The British in India

European trade with Asia opened up in the 1500s as sea routes replaced difficult overland routes. British involvement in India dates back to this period, when English traders first sailed along India's coast. In 1600 some of these traders formed the East India Company, which later became one of the richest and most powerful trading companies the world had ever known.

After its founding, the East India Company built trading posts and forts in strategic locations throughout India. The French East India Company did the same and challenged the British for control of the India trade. In 1757 Robert Clive, a British East India Company agent, used an army of British and Indian troops to defeat the French at the Battle of Plassey. During the next hundred years, the British expanded their territory in India through wars and commercial activity.

The Sepoy Rebellion

As a result of the steady expansion, the East India Company came to control most of India by 1857. Their power was tested that year, however, when the **sepoys**, or Indian soldiers, rebelled against their British commanders. Long before the greased bullet rumor discussed at this chapter's beginning triggered the Indian Revolt of 1857, sepoy resentment had been growing over British attempts to impose Christianity and European customs on them.

The sepoy rebellion spread across northern and central India, in some places resulting in the massacre of British men, women, and children. Within a year, British forces put down the uprising. In revenge for the massacres, they killed thousands of unarmed Indians. The revolt left bitterness on both sides and forced the British to tighten their control of India. In 1858 Parliament ended the East India Company and sent a **viceroys** to rule as the monarch's representative. Treaties secured the loyalty of the remaining independent Indian states.

Indian Nationalism

The British government tried to quell further unrest in India by spending vast amounts of money on India's economic development. It built paved roads and an extensive railway system; it installed telegraph lines and dug irrigation canals; and it established schools and universities

At the same time, British colonial officials discriminated against Indians and forced them to change their ancient ways, often with tragic results. Indian farmers, for example, were told to grow cotton instead of wheat, because British textile mills needed cotton. The lack of wheat then led to severe food shortages that killed millions of Indians during the 1800s.

Outraged by the food shortages and other problems, many Indians wanted to move toward self-rule. In 1885 a group of Indian business and professional leaders formed the Indian National Congress. Accepting western ideas such as democracy and equality, the Congress at first used peaceful protest to urge the British to grant more power to Indians. Later, as the Congress party, it led the long struggle for complete independence.

China Faces the West

When the British increased their hold on India, they and other Europeans developed trade with China. During the 1500s, Chinese civilization had been highly advanced, and the Chinese at that time had little interest in European products. There was only limited trade between China and Europe during the next 300 years. During this period, while technological changes transformed Europe, China's political, economic, and military position weakened under the Qing dynasty. Qing emperors ruled China from 1644 to 1912.

The Unequal Treaty

In the early 1800s, British merchants found a way to break China's trade barriers and earn huge profits. In exchange for Chinese tea, silk, and porcelain—and to avoid paying cash—the merchants smuggled a drug called opium, which they obtained from India and Turkey, into China. In 1839 Chinese troops tried to stop the smuggling. When the British resisted, war broke out. The British used gunboats to bombard

Chinese ports and easily defeated the Chinese, who lacked modern weapons.

British victory in the Opium War in 1842 led to the Treaty of Nanking, the first of many “unequal treaties” that forced China to yield many of its rights to Western powers. The Nanking treaty granted the British payment for war losses as well as the island of Hong Kong. British citizens in China also gained extraterritoriality, the right to live under their own laws and courts. Over the next 60 years, the “unequal treaties” increased foreign influence in China and weakened the Qing dynasty. Civil wars, such as the Taiping Rebellion (1850-1864), also eroded the dynasty’s control.

By the 1890s, European powers as well as Japan claimed large sections of China as **spheres of influence**—areas where they had exclusive trading rights. Coming late to the imperialist scramble, the United States did not claim a sphere of influence. Instead, it tried to open China to the trade of all nations through the Open Door Policy. Deadlocked by their own rivalries, the powers reluctantly agreed to this policy in 1899.

Chinese Responses

To modernize China, some reformers during the late 1800s began a “self-strengthening” movement. This program involved importing both Western technology and educational methods. They also worked to improve agriculture, strengthen the armed forces, and end the European practice of extraterritoriality.

Lack of government support stalled these efforts. Chinese weakness was only further exposed in an 1894 war against a modernizing Japan that ended in China’s defeat and loss of territory. From China, Japan gained the island of

Taiwan and the Liaodong Peninsula as well as trading benefits in Chinese territory. The Japanese also ended China’s influence in Korea.

After the setback, reformers regained influence with the support of the young emperor Guang Xu (gawng SHYOO). They launched the Hundred Days of Reform to modernize the government and encourage new industries. However, conservatives led by the emperor’s mother, **Ci Xi** (TSUH-SEE), returned to power, arrested the emperor, and halted the reforms.

By the late 1890s, anti-foreign feelings in China had led to the formation of secret societies dedicated to removing diplomats, entrepreneurs, missionaries, and other foreigners from the country. One group, the Righteous and Harmonious Fists, practiced a Chinese form of boxing, and Westerners named its members Boxers. In 1900 the Boxers carried out attacks against foreigners and Chinese Christians, besieging foreign communities in **Beijing**, the Chinese capital. In response, the Western powers and Japan sent a multinational force that ended the uprising. The empress, who had supported the Boxers, reversed her policy.

The Revolution of 1911

After the Boxer Uprising, Ci Xi struggled to hold on to power. She agreed to allow foreign troops to remain in China and gave in to some of her people’s demands for change. For example, she established schools and reorganized the government. But it was too little, too late. Many Chinese believed that a modern republic should replace the Qing dynasty. In their view, the only way to achieve this goal was through revolution.

The revolutionaries wanted China to regain its former power and influence. One of them, a doctor named **Sun Yat-sen**, wrote in the early 1900s: “Today we are the poorest and the weakest nation in the world and occupy the lowest position in international affairs. Other men are the carving knife and serving dish; we are the fish and the meat.”

In 1905 Sun and other revolutionaries formed the United League (later known as the *Guomindang*, or Nationalist party). Their goal was to modernize China on the basis of the “Three Principles of the People”: nationalism (freedom from foreign control), democracy (representative government), and livelihood (economic well-being for all Chinese). The revolutionary cause was strengthened in 1908 when Ci Xi died, and two-year-old Prince Pu Yi became emperor. Three years later, revolution swept China as peasants, workers, soldiers, and court officials turned against the weak dynasty. Sun Yat-sen hurried home from a fund-raising tour of the United States. In January 1912, he became the first president of the new Chinese republic.

TURNING POINT **Modernization of Japan**

Japan’s dealings with the European powers began in much the same way as China’s, but they ended differently. European traders first came to the island country in the 1500s. Like the Chinese, the Japanese were uninterested in European products, and they cut off almost all trade with Europe in the early 1600s. At the time a military commander called a shogun ruled Japan. Although the country also had an emperor, he had no real power.

Japan did not trade again with the outside world until 1853, when four American warships commanded by Commodore **Matthew C. Perry** sailed into the bay at Edo (present-day Tokyo). Perry wanted Japan to begin trading with the United States. The shogun, knowing what had happened with China in the recent Opium War, decided early in 1854 to sign a treaty with Perry.

The Meiji Leaders

In the first five years after Perry’s arrival, the shogun signed trade treaties with Britain, France, Holland, Russia, and the United States. Since the treaties favored the imperialist powers, the Japanese people called them unequal treaties, just as the Chinese had. Unhappiness with the treaties led to the overthrow of the shogun in 1868. A group of samurai gave its allegiance to the new emperor, **Mutsuhito**, but kept the real power to themselves. Because Mutsuhito was known as the Meiji (MAY-jee), or “Enlightened” emperor, Japan’s new rules were called the Meiji leaders.

The Meiji leaders tried to make Japan a great power capable of competing with Western nations. Adopting the slogan “Rich country, strong military” they brought the forms of parliamentary government to Japan, strengthened the military, and worked to transform the nation into an industrial society. The Meiji leaders established a system of universal education designed to produce loyal, skilled citizens who would work for Japan’s modernization. In this way, the Japanese hoped to create a new ruling class based on talent rather than birth.

Industrialization

In the 1870s Japan began to industrialize in an effort to strengthen its economy. The Japanese did this with little outside assistance. They were reluctant to borrow money from the west, fearing foreign takeovers if loans could not be repaid. In any case, most Western banks were not interested in making loans to Japan, because they considered the country a poor financial risk.

The Japanese government laid the groundwork for industrial expansion. It revised the tax structure to raise money for investment. It also developed a modern currency system and supported the building of postal and telegraph networks, railroads, and port facilities.

Begging in the late 1880s, Japan's economy grew rapidly. A growing population provided a continuing supply of cheap labor. The combination of new technological methods and cheap labor allowed Japan to produce low-priced goods. Wars at the turn of the century further stimulated Japan's economy and helped it enter new world markets. By 1914 Japan had become one of the world's leading industrial nations.

Japan as a World Power

By the 1890s the Meiji leaders had taken great strides toward creating a modern nation. Japan had acquired an efficient government, a vigorous economy, and a strong military. Needing more natural resources, the Japanese government began to establish its own overseas empire. The first prize it attempted to take was Korea.

When the people of Korea revolted against their Chinese rulers in 1894, Japan decided to intervene. Japanese troops easily defeated the Chinese army in the Sino-Japanese War. Although Korea officially became independent, Japan

gained partial control of its trade. Over the next few years, thousands of Japanese settled in Korea.

Korea also figured in Japan's next war. The Russian Empire had interests in Korea as well, and its interests began to clash with Japan's. Even more important was neighboring Manchuria, where the Russians kept troops and had a naval base at Port Arthur. In 1904 the Japanese navy launched a surprise attack on Port Arthur. Few people expected Japan to win the Russo-Japanese War, but the Japanese piled up after the victory. The conflict ended in 1905, when Russia signed a treaty granting the country of Japan control over Korea and other nearby areas.

Japan's victory over Russia inspired non-Western nationalist leaders throughout the world. It proved that the European empires could be defeated if one had the will and determination. On the other hand, Japan had now become an imperialist country itself. It annexed Korea as a colony in 1910 and continued to expand its empire for the next 35 years.

End of TURNING POINT

Southeast Asia

Southeast Asia consists of two distinct geographic areas. Island Southeast Asia is made of two archipelagos, or groups of islands: **the East Indies** and **the Philippines**. To the north and west lies mainland Southeast Asia. It includes all of the territories that occupy the Indochinese and Malay Peninsulas.

The growth of imperialism in these areas followed a familiar pattern. Beginning in the 1500s, imperialist powers came, saw, and conquered. Over the next 400 years Portugal, Spain, the Netherlands, Great Britain, France, and the United

States all set up colonies in that region. They ranged in size from the huge Dutch East Indies that included thousands of islands to the tiny British settlements on the island of Singapore.

The Islands of Southeast Asia

For centuries, the island region of Southeast Asia had attracted foreign traders and colonizers. At the beginning of the 1800s, the Dutch controlled the Philippines.

The Dutch East Indies, present-day Indonesia, had many natural resources, including rich soil. Farmers grew coffee, pepper, cinnamon, sugar, indigo, and tea; miners dug for tin and copper; loggers cut down ebony, teak, and other hardwood trees. The Dutch government used a method of forced labor called the **culture system** to gather all these raw materials. The Dutch also discouraged **westernization**, or the spread of European civilization. The enormous profits the Dutch received from the East Indies made the colony the envy of the imperialist powers.

Diponegoro, a native prince from the East Indian island of Java, started a revolt against the Dutch in 1825. Although it lasted 10 years, this revolt eventually ended in failure, and the Dutch encountered little real opposition for the next 80 years. One of the Dutch governors put it this way. “We have ruled here for 300 years with the whip and the club and we shall still be doing it in another 300 years.” In the early 1900s, the Dutch won control of the entire archipelago, extending their rule into northern Sumatra and the Celebes. But within a generation, nationalist forces would bring the Dutch East Indian Empire to its knees.

The Spanish rule of the Philippines resembled the Dutch rule of the Dutch East Indies. Native Filipinos worked

for very low wages, if any, on tobacco and sugar plantations owned by wealthy Spaniard landowners. During the 1800s the Filipinos’ resentment grew until it finally exploded into revolution in 1896.

When the United States declared war on Spain in 1898, the American government promised to free the Philippines in return for the rebels’ help against the Spanish. After winning the Spanish-American War, the United States broke its promise and ruled the Philippines as a colony. The Filipinos led by **Emilio Aguinaldo** (ah-gee-NAHL-doh) then arose against American rule, but United States troops defeated them two years later.

Mainland Southeast Asia

The mainland region of Southeast Asia consisted of several large territories in the early 1800s, including Burma (present-day Myanmar) and Malaya in the west, Vietnam in the east, and Siam (Thailand), Cambodia, and Laos in the middle. All through the 1800s, Great Britain and France struggled for domination of the area—more for military gain than for economic reasons.

The British swept into Burma from India in the 1820s. Over the next 60 years, they took full control of Burma and neighboring Malaya. Meanwhile, the French were slowly conquering Indochina, the region that includes present-day Vietnam, Cambodia, and Laos. They, too, established complete control in the 1880s.

Squeezed between the two growing blocks of British and French territory lay the kingdom of Siam. In 1893 the French invaded Siam, sending forces into Bangkok, the capital city. Great Britain and France avoided armed conflict, however, when they agreed to define their spheres of influence

in Southeast Asia. As a result of the agreement, Siam remained independent.

European rivalries for control of resources brought much disturbance to mainland Southeast Asia. Western influences changed traditional ways of life. Colonial landowners and trading companies forced local farmers and workers to grow cash crops, mine coal, and cut teak trees.

Section 4

Imperialism in the Americas

On the floor of the Senate in 1898, United States Senator Albert J. Beveridge delivered a stirring speech on America's growing role as a world power:

*Fate has written our policy for us; the
trade of the world must and shall be ours.
We will establish trading-posts throughout
the world as distributing-points for
American products....Great colonies governing
themselves, flying our flag and trading
with us, will grow about our posts of trade.*

Senator Beveridge's grand ambition capped a half-century of growing American influence in world affairs. The imperialist powers of Europe had already laid claim to much of

the world. Now that the United States had grown considerably in size, wealth, and power, it was determined to use the Monroe Doctrine to block the spread of European imperialism in neighboring Latin America, an area that includes Mexico, the Caribbean islands, Central America, and South America. In doing so, the United States was also promoting its own brand of imperialism that involved the penetration of new economic markets and the acquisition of overseas territories.

TURNING POINT The Monroe Doctrine

Even before the independence of all the Latin American countries was well established, Spain had sought the support of other European powers in reconquering its former colonies. Both the United States and Great Britain opposed Spain's plan. The United States did not want a strong European power so close to its borders. Great Britain had developed good trade relations with the Latin Americans and did not feel that its commercial interests would be served by the return of Spanish control to the Americas.

Great Britain suggested to the United States that a joint warning be issued to the various European powers. However, President **James Monroe** and Secretary of State John Quincy Adams decided to act alone. In 1823 Monroe warned the European powers not to interfere in the countries of the Western Hemisphere. The Monroe Doctrine, as it was later called, contained two major points:

- 1. The American continents, by the free and independent condition which they have assured and maintain, are hence*

forth no to be considered as subjects for future colonization by and European powers.

- 2. We should consider any attempt on their part to extend their system to any portion of this hemisphere as dangerous to our peace and safety.*

At the time the Monroe Doctrine was declared, it was not clear what the United States would do if European powers tried to conquer any part of Latin America. The support of the British Royal Navy, however, ensured that the infant states of Latin America would remain free to determine their own political destinies.

As the United States grew in strength during the late 1800s and early 1900s, it began to make its power felt in Latin America. In 1895, when Great Britain was in conflict with Venezuela over the boundaries of British Guiana, the United States urged that the dispute be submitted to **arbitration**, or settlement by a third party that is agreeable to both sides.

Appealing to the Monroe Doctrine, the United States Department of State issued a strong warning to the British to pressure them into accepting arbitration. Aware of the power of the United States and involved with problems in its empire, Great Britain agreed to a peaceful settlement.

End of TURNING POINT

The Spanish-American War

Soon after the Guiana border dispute was settled, the United States turned its attention to **Cuba**. Cuba and the neighboring island of **Puerto Rico** were still Spanish colonies

in the late 1800s. Cuba was particularly important to Spain, which reaped huge profits from the island's many sugar and tobacco plantations.

In 1895 **José Martí**, a writer and political activist, led Cubans in revolution against Spanish rule. Cuba's Spanish leaders embarked on a bloody attack on the rebel forces. Martí was killed in a battle against the Spaniards, and Spanish troops rounded up thousands of Cubans and sent them to prison camps where conditions were brutal. Disease and starvation soon claimed more than 400,000 Cuban lives.

Remember the *Maine!*

The struggle of the Cubans for freedom attracted much sympathy in the United States. American newspapers printed vivid stories describing the cruelty and killings in Cuba. Soon, prominent American politicians began clamoring for war with Spain. Businesspeople who had invested in Cuba also joined in. Finally, in January 1898, President **William McKinley** ordered the battleship *Maine* to Havana, the capital of Cuba, to demonstrate growing American interest in Cuban affairs. A few weeks later, an explosion ripped through the *Maine* while it was still anchored in Havana harbor, sinking the ship and killing 260 American sailors.

The cry "Remember the *Maine!*" swept across the United States. American newspapers left little doubt that Spain was responsible for the disaster. In April 1898, under pressure from all sides, McKinley asked Congress to declare war on Spain. The Spanish-American War lasted four months and ended with a victory for the United States.

American Territorial Gains

During the late 1800s, the United States made many significant territorial gains. In 1867 it purchased Alaska from Russia, and in 1898 annexed Hawaii, shortly after American entrepreneurs on the island had overthrown the Hawaiian queen Liliuokalani (lee-lee-oo-oh-kah-LAH-nee). As a result of the Spanish-American War, the United States gained from Spain territories in the Pacific Ocean (the Philippines and Guam) and in the Caribbean Sea (Puerto Rico). Although independent, Cuba was under American protection. In 1917 the United States purchased **the Virgin Islands** (St. Thomas, St. John, and St. Croix) from Denmark.

The Panama Canal

Victory in the Spanish-American War made the United States a world power. It became important for the United States to be able to move its fleet quickly between the Pacific and Atlantic Oceans. What was needed was a canal across the **Isthmus of Panama**, a narrow neck of land that linked Central America and South America.

For centuries, Europeans and Americans had dreamed of building a canal across Central America. In the 1880s the Frenchman Ferdinand de Lesseps, who had built the Suez Canal, tried—and failed—to build a canal in Panama. Thirteen years after the bankruptcy of de Lesseps' company, United States President **Theodore Roosevelt** received the backing of Congress to acquire the Panama canal rights and property.

In 1902 Panama was part of Colombia. Roosevelt tried to negotiate a treaty with Colombia that year that would give

the United States land to build the canal in Panama. When Colombia refused to sign the treaty, Roosevelt and the American public were outraged.

Roosevelt soon developed a plan, however. With his approval, American agents encouraged the people of Panama to revolt against the government of Colombia. They did so on the night of November 3, 1903, with the help of the United States Navy, which prevented Colombian troops from landing. The rebellion was over by the next day, and the new Republic of Panama quickly signed a treaty granting the United States the land to build the Panama Canal.

Construction of the canal began in 1904 and took 10 years to complete. More than 40,000 workers cut through hills, built dams, and drained swamps until the two mighty oceans were connected. Many of the workers, however, died of malaria and yellow fever. This problem eventually was solved by implementing a sanitation program to control disease-carrying mosquitoes. When the first ship finally steamed through the canal in August 1914, the canal was hailed as one of the world's great engineering feats.

Possession of the Panama Canal gave the United States even more of a stake in Latin America. Thus, the United States continued to exert its power in the region throughout the early 1900s. In 1904 President Theodore Roosevelt extended the Monroe Doctrine in what became known as the Roosevelt Corollary. Under this addition, the United States would actively intervene to force Latin American countries to honor their foreign debts. During the next two decades, United States forces intervened in such countries as the Dominican Republic, Haiti, and Nicaragua. The United States hoped its interventions would provide stability and prepare the way for democracy. Most Latin Americans, however, viewed American actions as moves to turn their countries into

“colonies” of the United States and to protect foreign businesses that were exploiting their resources.

Mexico

During the 1800s and early 1900s, the United States became deeply involved in the affairs of its southern neighbor, **Mexico**. During the 1830s, opposition to the dictatorial rule of General Antonio López de Santa Anna grew in the Mexican state of Texas, where many Americans had settled. In 1835 the Americans and some Mexicans in Texas revolted and the next year set up an independent republic. Ignoring Mexican opposition, Texas in 1845 joined the American republic as a state, and conflict soon developed between Mexico and the United States. Despite the bravery of its soldiers, Mexico lost the Mexican War. In the Treaty of Guadalupe Hidalgo (1848), nearly half of Mexico’s territory went to the United States.

Reform and Conflict

After the Mexican War, Mexico entered an era of change known as La Reforma. In 1855 Mexican voters chose **Benito Juárez**, a lawyer of Native American background, as president. Juárez reduced the power of the military, separated church and state, and improved the lot of impoverished farmers. In 1863, when Mexico could not pay its foreign debts, French troops occupied Mexico City. Juárez fled the capital to organize a guerilla movement in the countryside. In 1864 Mexican conservatives supported by the French, named Austrian Archduke Maximilian emperor of Mexico. In 1867 the French, under American pressure, withdrew their troops

from Mexico, and Juárez returned to power after his forces had ousted and executed Maximilian.

Four years after Juárez’s death in 1872, General **Porfirio Díaz** seized power. To ensure “Order and Progress,” Díaz strengthened the army and limited individual freedoms. Under Díaz’s harsh rule, however, Mexico made economic advances, building railroads, developing industries, expanding farmlands, and opening new mines. Unfortunately, for the Mexican people, most profits went to foreign investors and wealthy landowners. While the rich prospered, most Mexicans remained poor farmers, working on large estates for low wages.

TURNING POINT

The Mexican Revolution

Discontent with Díaz eventually led to revolution. From 1910 to 1920, Mexico was engulfed by the first major social upheaval in modern Latin America. During this time, armies of farmers, workers, ranchers, and even *soldaderas*, or women soldiers, fought the authorities and each other across Mexico. The unrest also sparked a wave of Mexican immigration to the United States.

The revolution began when Francisco Madero, a liberal reformer, and his supporters overthrew Díaz in 1911. Once in power, Madero was murdered by one of his generals, Victoriano Huerta. A year later, Huerta himself was toppled from power by Mexican revolts and American intervention.

No strong leader emerged to take Huerta's place. Instead, three revolutionary leaders—**Emilio Zapata**, **Francisco “Pancho” Villa**, and **Venustiano Carranza**—competed for power. Using the battle cry “*Tierra y Libertad!*” (Land and Liberty!), Zapata and his followers fought for the rights of impoverished farmers. Like Zapata, Villa proposed radical reforms. The more conservative Carranza, however, was able to become president in 1915 with American support. In retaliation, Villa crossed the border into New Mexico and killed 18 Americans. United States President **Woodrow Wilson** then sent American troops into Mexico to capture Villa. American entry into World War I in 1917 led to the withdrawal of these troops.

That same year, Carranza reluctantly introduced a liberal constitution but was slow in carrying out reforms. Force was often used against Carranza's opponents. For example, in 1919 a pro-Carranza military officer murdered Zapata, who had protested Carranza's disregard of land reform. A year later, Carranza himself was killed during a revolt that brought General Álvaro Obregón to power. As the revolutionary violence began to subside in the early 1920s, relations between Mexico and the United States were less tense. The memory of American intervention, however, lingered in the minds of Mexicans for years to come.

End of TURNING POINT