

1830–1917

The Age of Imperialism

1830
Politics

France occupies Algiers.

1830
Business and Finance
 Chile begins to export nitrates for gunpowder.

1834
The Arts
 Eugène Delacroix paints *Algerian Women at Home*.

1830

1845

1837
Global Events
 Queen Victoria begins her reign.

1835
Politics
 The Boers begin the Great Trek in Africa.

1831
Daily Life
 The French Foreign Legion is formed.

A commemorative plate portraying Queen Victoria of Great Britain



1848
The Arts
 Japanese printmaker Katsushika Hokusai finishes *Mount Fuji Seen Below a Wave at Kanagawa*.

1854
Global Events
 The Crimean War begins.

1860

1867
Global Events
 Canada becomes a self-governing dominion.

1871
Daily Life
 Sir Henry Stanley finds Dr. Livingstone in Africa.

1849
Daily Life
 Cape Colony forbids the landing of convicts.

1869
Science and Technology
 The Suez Canal is completed.

1868
Politics
 The Meiji era begins in Japan.

1866
Science and Technology
 The first transatlantic telegraph cable is laid.

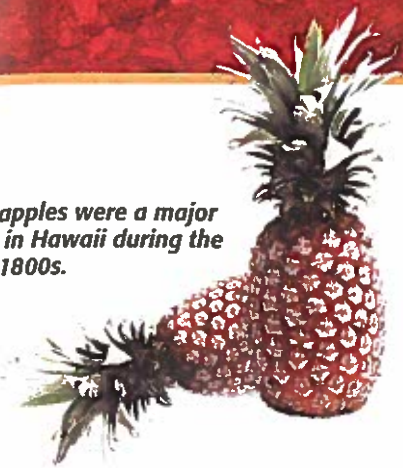


The Great Wave of Kanagawa, by the Japanese artist Katsushika Hokusai

Build on What You Know

In 1815 Europe reached a turning point. Napoléon had been defeated. The rulers hoped to return their empires to the old ways. The ideas of nationalism, though, swept through Europe. Many people thought the unified nation-state was the best way to gain individual rights. This nationalism led to unrest and revolutions. Those European countries that accepted change and reform emerged as stronger and more unified states. The strongest of these began to expand their empires across the globe. In this chapter, you will learn how the great European powers and the United States came to control a large part of the world.

Pineapples were a major crop in Hawaii during the late 1800s.



British writer Rudyard Kipling



1898
Politics
The United States annexes Hawaii.

1899
Global Events
The Boer War between the British and the Transvaal's Dutch settlers starts in South Africa.

1907
The Arts
Rudyard Kipling wins the Nobel Prize for literature.

1890
Daily Life
Influenza epidemics occur worldwide.

1901
Science and Technology
Mosquito controls rid Havana of yellow fever.

1910
Global Events
The Mexican Revolution begins.

1891
The Arts
French painter Paul Gauguin settles in Tahiti.

1916
The Arts
Frank Lloyd Wright designs the Imperial Hotel in Tokyo.

1877
Business and Finance
Frozen meat is shipped from Argentina to Europe for the first time.

1875

1890

1905

1920

1886
Business and Finance
Gold is discovered in the Transvaal in Africa.

1904
Politics
The Roosevelt Corollary is adopted.

1914
Science and Technology
The Panama Canal opens, linking the Caribbean and Pacific Oceans.

1913
Science and Technology
Dr. Albert Schweitzer opens a hospital in the French Congo.



Self-Portrait With Palette by French artist Paul Gauguin



The U.S.S. Maine

What's Your Opinion?



Do you **agree** or **disagree** with the following statements? Support your point of view in your journal.

Geography Imperialists should expand into locations that benefit their need to transport goods and raw materials.

Global Relations An industrialized country can easily control a country that is not industrialized.

Economics Imperialists should expand into areas that have natural resources they can use.

READ TO DISCOVER

- 1 What is imperialism, and how have imperialists sought to control other peoples?
- 2 What were the economic causes of Western imperialism?
- 3 In what ways was Western imperialism a product of cultural differences?

DEFINE

imperialism
settlement colonies
dependent colonies
protectorates
spheres of influence

IDENTIFY

"The White Man's Burden"

WHY IT MATTERS TODAY

Imperialism is still common in the world today. Use [CNN](#) or other **current event** sources to find three instances of one country taking control of another country. Record your findings in your journal.

[CNN](#) [student](#)
News.com

Imperialism often started with the merchant trade. These foreign merchant ships are arriving at a harbor in China.

The Roots of Western Imperialism

The Main Idea

Imperialism among the great powers grew out of a complex mixture of political, economic, and social forces.

The Story Continues *During the 1800s, Europeans continued their expansion. At first the Europeans had little influence in the places where they settled. In about 1870, though, they began to take control of these new areas, viewing expansion as a right and a responsibility. "It is our duty," explained a famous supporter of expansionism, "to seize every opportunity of acquiring more territory. . . ."*

Modern Imperialism

The years between 1870 and 1914 were the height of the age of imperialism. Imperialism is when one country takes control of another country. One country might control the other's government, trade, or culture. This was not a new idea. Empires had controlled other countries before the 1800s. What was new was the strength of the modern nations. By 1914 the great powers of Europe, Japan, and the United States controlled almost the entire world.

In the beginning, major European governments such as France, Germany, and Great Britain did not plan their imperialism. Often it started when merchants or explorers went to foreign lands. Sometimes the Europeans were not welcome. Then European soldiers would arrive to protect their citizens. After a while, engineers and builders would come. They would open mines, build roads, and make other improvements. The area would be developed, but only for the benefit of the Europeans. The local people had very little say in this process.

Types of control. In some places Europeans had **settlement colonies**. These were large groups of people from one country living together in a new place. For example, Australia was a settlement colony of Great Britain. In other areas Europeans set up **dependent colonies**. In these, a few European officials ruled the non-European people. India, for example, was a dependent colony of Great Britain.



Europeans set up **protectorates** in some areas. Here, the local ruler kept his title. The Europeans, however, really controlled the area. Other nations were kept out. Areas that were not colonies or protectorates were often in **spheres of influence**. A sphere of influence was an area in which one nation had a special interest. Other nations agreed to respect those special interests.

National rivals. Nationalism was a powerful force between 1870 and 1914. Nations believed that others would respect them more if they had colonies. They also saw colonies as places to get troops for bigger armies. Gurkhas, soldiers from Nepal, joined Australians and New Zealanders in British armies. Troops from West Africa fought for the French.

Nations thought a large navy was as important as a large army. Navies protected widely scattered colonies as well as the nation's merchant ships. During this time, steam-powered ships burned coal. The range of a steamship was "from coal to coal." That made a coaling station, a place where ships could refuel, very important. Tiny islands with nothing to offer except their strategic locations became coaling stations or naval bases. Often these islands became objects of fierce competition among naval powers.

By 1914 there were bitter rivalries among the imperial powers. Nations had colonies all over the world. They had huge armies and navies. They had also created hatred among the colonized people. Eventually this led to world conflict.

✓ **READING CHECK: Comparing and Contrasting** What were the similarities and differences among the four ways imperialists controlled their colonies?

Economic Motives for Imperialism

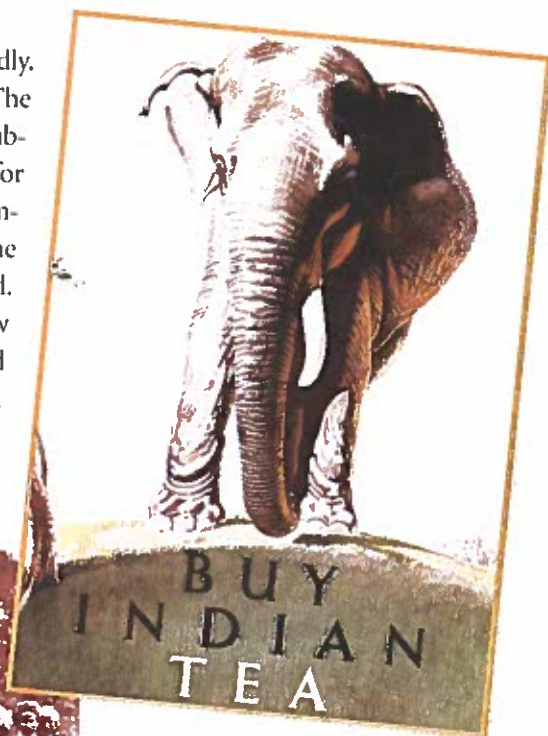
Industrialization spurred imperialism. After 1850 technology grew rapidly. There were new kinds of energy, new machines, and new industries. The industrialized nations needed a lot of raw materials, such as copper and rubber, to make products. None of the nations wanted to depend on others for raw materials. Their leaders were afraid that in the event of war their countries would not be able to fight off an enemy. To protect themselves, the countries tried to control regions that had the raw materials they needed.

New technology also brought a need for new markets. It was now possible to produce huge amounts of goods. There was also an increased demand for products, particularly in Europe and the United States. Even so, Europe and the United States could not use all the goods produced. Industrialists began to look for new markets in Asia, Africa, and Latin America.



INTERPRETING THE VISUAL RECORD

U.S. imperialism This political cartoon represents the United States gathering the fruits of imperialism. *What does the image imply about the ability of Western powers to take the countries they wanted?*



The desire for raw materials and trade goods fueled colonization among many European powers. This advertisement for Indian tea appeared in Britain.

Europeans and Americans believed that if other people knew their goods were available, they would buy them. Some imperialists went further. They believed they could create new markets by changing people's habits. For example, they would convince the people of central Africa to wear shirts and ties. This would create more business for European and American clothes factories. The factories would hire more people and everyone would make more money.

Industrialists thought they should control their new markets, just as they controlled the sources of their raw materials. They wanted their governments to give them exclusive rights to sell in these markets. At the same time, they demanded protective tariffs to ensure that they would not lose their home markets to foreign competition.

Rapid population growth accompanied industrialism. This provided another economic motive for imperialist expansion. Some historians estimate that the world's population doubled between 1800 and 1900. Industrial development created many jobs, but in Europe there was not enough work to employ all the new job seekers. Dis-

placed farmers and laborers often found it necessary or desirable to go elsewhere. As a result, Europeans left their home countries in record numbers in the 1880s. For Great Britain, France, and Germany, overseas migration was not a new phenomenon. For such countries as Italy, Spain, and Austria-Hungary, however, the emigrations of the 1880s marked the first mass movements of their peoples. The populations of North America, South America, and Australia swelled with settlers from Europe.

✓ **READING CHECK: Summarizing** What were the two main economic motives for Western imperialism?

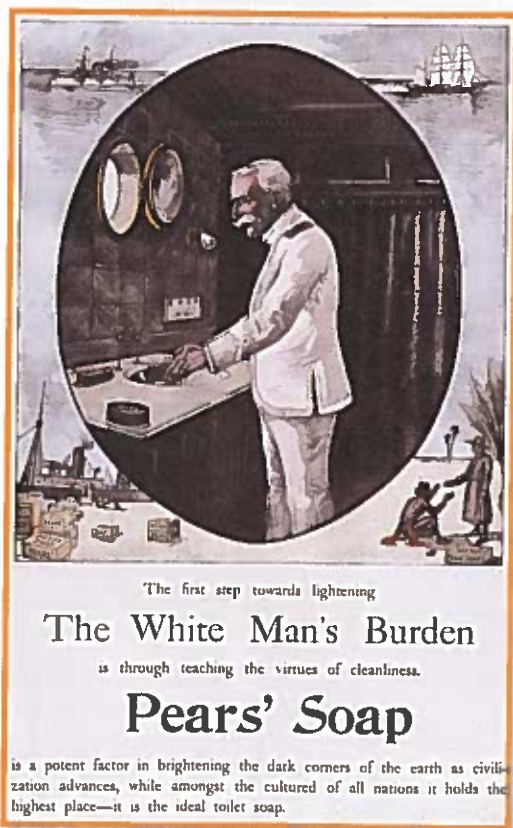
Cultural Motives for Imperialism

Many people in the industrialized nations thought they had a duty to spread Western ideas and knowledge around the world. People were considered lacking if their religion or culture differed from that of the West.

"The White Man's Burden." British poet Rudyard Kipling is widely considered to be the most powerful voice in favor of British imperialism. The title of one of his best-known poems is "The White Man's Burden." This phrase is often used to sum up the Western attitude toward non-Western people. This is the first stanza of the poem.

INTERPRETING THE VISUAL RECORD

Advertising This soap advertisement appeared in the 1800s. How does this advertisement reflect the ideas of "The White Man's Burden"?



Analyzing Primary Sources

Finding the Main Idea What did Kipling mean by the phrase, "Go bind your sons to exile"?



“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.”

from "The White Man's Burden," by Rudyard Kipling

Many Europeans agreed with Kipling's poem. They thought non-Western people were primitive—"half devil and half child." These wrong ideas caused Europeans to change the way of life for countless people. They were "helping" or "improving" them. Europeans also used the idea of their "burden" to justify imposing their own values and cultural ideas on other peoples.

People who were against imperialism claimed that the only burden the white man wanted to take up was the burden of colonial wealth. Such opponents, however, had very little effect on the imperialist policies of Western nations.

Missionaries. Christian missionaries were very active throughout many areas of the world during the age of imperialism. Churches in Europe and the United States sent a growing number of people to the colonies. Although they hoped to convert people to Christianity, the missionaries did other work as well. Many had been trained as teachers. They helped build schools and taught in them. Others had medical training. They cared for the sick and helped to establish and operate hospitals. Through the efforts of these missionaries, knowledge of medicine, hygiene, and sanitation spread along with Christianity.

✓ **READING CHECK: Identifying Bias** How did the attitudes and beliefs of Western people affect imperialism?



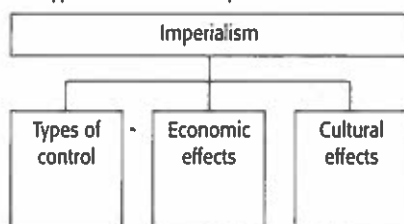
This photo shows a missionary classroom in the Philippines. Missionaries spread learning and modern medical practices, as well as Christianity, during the age of imperialism.

SECTION I REVIEW

1. **Define** and explain the significance:
imperialism
settlement colonies
dependent colonies
protectorates
spheres of influence

2. **Identify** and explain the significance:
"The White Man's Burden"

3. **Categorizing** Copy the chart below. Use it to organize the economic and cultural effects of imperialists and the types of control they used.



4. **Finding the Main Idea**

- Why did imperialism lead to dissent among colonized people?
- What evidence would you give that the most important motive of imperialists was economic?
- How did the ideas expressed in "The White Man's Burden" affect the lives of colonized people?

5. **Writing and Critical Thinking**

Identifying Cause and Effect Explain the factors that caused the Western imperialists to take over other areas of the world.

Consider:

- economic causes
- national rivalries
- cultural motives

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READ TO DISCOVER

- 1 Why did the French want to gain control of North Africa?
- 2 What events and aims promoted British expansion in North and East Africa?

IDENTIFY

Suez Canal
al-Mahdi
Fashoda crisis

WHY IT MATTERS TODAY

The Suez Canal has been very important to world shipping. It is used just as much today as it was in the 1800s. Use [CNN](http://cnn.com) or other **current event** sources to find out about the canal and what has happened to it since 1900. Record your findings in your journal.

[CNN](http://cnn.com)
student
NEWS.com

European Claims in North Africa

The Main Idea
Imperialism motivated both France and Great Britain to establish colonies in North Africa.

The Story Continues Some European nations sought to expand overseas not only out of a concern for national security but also from a sense of national identity and pride. Jules-François-Camille Ferry, who became France's Minister of Foreign Affairs in 1883, explained his motives for empire-building. "France . . . cannot be merely a free country. . ." Ferry insisted. "She ought to propagate [spread] [her] influence throughout the world and carry everywhere that she can her language, her customs, her flag, and her genius."

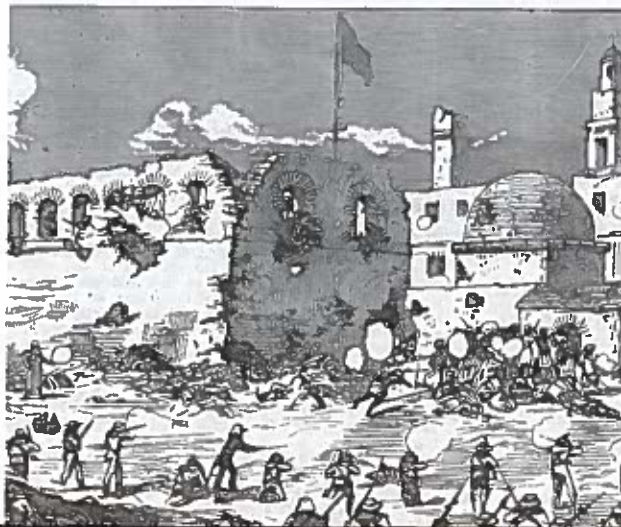
The French in North Africa

The French looked toward North Africa to expand their empire. In 1830 a French force occupied Algiers, a Muslim state of the Ottoman Empire. The Algerians did not want French rule. For more than 40 years, the French fought against almost continuous local rebellions. The French thought Algiers was worth the trouble. Many French people and other Europeans moved there. French officials took over Algerian land and settled many colonists there.

The small state of Tunis was east of Algiers. Tunis was also part of the Ottoman Empire, but it had an independent government. In 1881 France found a weak excuse to stage a military action against Tunis, which became a French protectorate. The Turkish governor stayed as ruler, but the French controlled the country. Like the Algerians, the Tunisians resented French control. Many people were inspired to work toward independence.

Morocco's strategic location on the Strait of Gibraltar made it another appealing prize. In 1904 France made an agreement with Britain, Spain, and Italy. According to the agreement, France took control of Morocco. In return, France promised not to get in the way of Britain's plans for Egypt or Italy's plans for Libya. Spain was allowed to keep a sphere of influence in northern Morocco for trading purposes. In 1909 Morocco became a French protectorate.

✓ **READING CHECK: Making Generalizations** How did the people of North Africa react to the French expansion?



France held Tunis (now Tunisia) as a protectorate from 1881 until granting it independence in 1956. This illustration shows French troops storming Tunis in 1881.

Morocco and France

France's takeover of Morocco was not an invasion by force. Rather, the leader of Morocco, facing enormous pressure from many sides, made the decision to ask for French intervention. Making decisions like this one involves choosing between two or more courses of action. The decisions that people and nations make have played a significant role in the shaping of history. Thus, an important part of understanding the events of the past is the ability to analyze and evaluate the decisions that historical figures have made. The factors that go into choosing a course of action make up what is known as the decision-making process. Familiarity with such a process will not only help you to better understand history, but may also help you improve your own decision-making skills.

A Historian's Account

The text below describes the events that led to Moroccan sultan Moulay Abd al-Hafid asking for French control of his country.

In 1911 Moulay Abd al-Hafid found himself besieged in his capital, Fez, by hostile tribesmen. He quickly considered appealing to France for assistance. If he brought in the French to help restore order, they would seize control of the country—something for which his countrymen would never forgive him. As one prominent Moroccan put it, "Foreigners are the original cause of all our troubles." If the sultan did not seek French help, however, he might lose his throne and the country might sink deeper into violence and turmoil. In the end, Moulay Abd al-Hafid decided to invite the French in. As a result, France made Morocco a protectorate and set about governing the nation's affairs. Moroccans responded by branding the sultan a traitor and embarking on a years-long rebellion against French rule.



Sultan Moulay Abd al-Hafid (above, right) appealed to the French to help restore order in Morocco. At the left, French and Spanish delegates are shown at the signing of the treaty that made Morocco a French protectorate.

Skills Reminder

To use a decision-making process, identify the decision by determining the situation that calls for a decision to be made. Recognize the options. Note what different courses of action the person, group, or nation may choose. Then assess the possible outcomes of the different courses of action. Take into consideration the advantages and disadvantages of each option. Analyze the decision. Determine what course of action the person or group chose and evaluate it based on the actual consequences it brought about.

Skills Practice

- 1 Read the account of Moulay Abd al-Hafid's decision. Identify the situation, the options, and possible outcomes.
- 2 Identify the decision he made and evaluate its wisdom based on the outcomes it produced.
- 3 Choose another situation from this chapter in which a person, group, or nation had to make a decision. Consult the library or Internet for more information if necessary. Using the decision-making process, write a paragraph analyzing and evaluating the decision.

The British in North Africa

Egypt had been part of the Ottoman Empire for centuries. By the mid-1800s, though, the empire was weakening. The Ottoman rulers in Egypt had become nearly independent.

Egypt and the Suez Canal. In 1854 the Egyptian government allowed a French company to start building a canal. The Suez Canal would go through the Isthmus of Suez to connect the Mediterranean Sea and the Red Sea. Egypt bought almost half of the stock in the company.

Building the canal cost Egypt a lot of money. At the same time, the Egyptian ruler had an extravagant lifestyle. Soon Egypt was deeply in debt. To avoid bankruptcy, Egypt decided to sell its stock in the Suez Canal. This action gave the British a great opportunity. They wanted to control the canal. It would give them a more direct sea route to their colonies in India, Australia, and New Zealand. In 1875 Great Britain bought the Egyptian stock. Because the British now owned so much stock, they gained control of the canal.

At about the same time, an international committee was set up to manage Egypt's huge debt. Many Egyptians did not want to be controlled by foreigners. Egyptian army leader 'Urabi Pasha tried to explain their view to a European.

Analyzing Primary Sources

Supporting a Point of View

How does Pasha appeal to the Europeans' sense of fairness in explaining the Egyptian viewpoint?



“Without doubt it will please every free man to see men free . . . truthful in their sayings and doings, and determined to carry out their high projects for the benefit of mankind generally, and the advantage of their own country in particular.”

'Urabi Pasha, from *Secret History of the Occupation of Egypt*
by Wilfred Scawen Blunt

'Urabi Pasha's words fell on deaf ears, however, and in 1882 a rebellion began. The British navy attacked Alexandria to put down the rioting. Britain then sent troops to stop another rebellion near the Suez Canal. Although Egypt seemed to be independent, the British actually ruled it for many years.

INTERPRETING THE VISUAL RECORD

Suez Canal This illustration shows the first voyage through the Suez Canal on November 17, 1869. *How might the Egyptian people in the crowd have viewed the opening of the Suez Canal?*



The Fashoda crisis. To the south of Egypt was the Sudan. The Sudan was an Egyptian colony. Both Great Britain and France were interested in controlling this area. The upper Nile River flowed through the Sudan. The British wanted to build dams along the river. They hoped to store water for irrigation and to manage the flow of water into the lower Nile. The French wanted to add the Sudan to the colonies they already controlled in the area.

Before the Europeans could act, there was a revolution in the Sudan. In 1881 a Muslim leader named Muhammad Ahmad led a revolt against Egyptian rule. He called himself *al-Mahdī*, a title meaning “the expected one.” Followers of the Mahdi gained control of several major cities. In early 1885 they captured Khartoum, the capital of the Sudan. The British decided to act to stop the Mahdists. They also wanted to prevent the French from gaining control in the Sudan. In 1898 Great Britain invaded the Sudan. Under General Horatio Herbert Kitchener, British troops quickly defeated a large Mahdist army.

Meanwhile, the French had also decided to act. Two years earlier they had sent an expedition to Africa under Captain Jean-Baptiste Marchand. Their goal was to gain control of the upper Nile at Fashoda. Starting from the French Congo, Marchand and his small force of Senegalese soldiers made a daring 3,000-mile journey through tropical Africa. In July 1898 Marchand reached Fashoda. Kitchener’s British forces arrived at Fashoda two months later. The French and British troops waited for orders from their governments. Both countries prepared for war. Finally, France realized that neither its army nor navy could defeat the British. France yielded the Sudan to Great Britain.

These events became known as the **Fashoda crisis**. The outcome was that Great Britain and Egypt won joint control of the area, with Great Britain clearly the dominant partner. The region became known as Anglo-Egyptian Sudan.

✓ **READING CHECK: Finding the Main Idea** What was the main reason Great Britain and France became involved in the Fashoda crisis?



Muhammad Ahmad

After reading more about Muhammad Ahmad on the Holt Researcher, write an outline for a speech he might have given to his followers explaining why they should oppose the British.



The powerful British lion forces the game but weaker French rooster to withdraw from Fashoda in this 1898 cartoon.



DOINGS IN THE DESERT.

SECTION 2 REVIEW

1. Identify and explain the significance:
Suez Canal
al-Mahdi
Fashoda crisis

2. Sequencing Copy the organizer below. Use it to place into sequence the important events in the record of British imperialism in North and East Africa.

	Date	Describe
Isthmus of Suez		
Tunis		
Khartoum		
Algiers		
Fashoda		

3. Finding the Main Idea

- What attitude did the French seem to have toward the people of North Africa?
- Why was Great Britain interested in controlling Egypt and the Sudan?

4. Writing and Critical Thinking

Supporting a Point of View Imagine it is the 1800s. You are against imperialism in North Africa. Write a letter to your local newspaper persuading others to support your views.

Consider:

- the rights of colonists
- how North Africans reacted to the French
- how Egyptians reacted to the British
- who benefited from the Suez Canal

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READ TO DISCOVER

- 1 What patterns of colonization did Europeans follow in West Africa?
- 2 What did Europeans gain by colonizing central and East Africa?
- 3 Why was South Africa so important to the colonial powers?
- 4 What effect did imperialism have on all of Africa?

DEFINE

paternalism
assimilation

IDENTIFY

Samory Touré
Sir Henry Stanley
Leopold II
Boers
Afrikaans
Shaka
Cecil Rhodes
Boer War
Menelik II

WHY IT MATTERS TODAY

Today, Africa is still struggling with problems that are a result of imperialism. Use **ONLINE** or other **current event** sources to identify one of these problems and explore how one African country is trying to solve that problem. Record your findings in your journal.



European Claims in Sub-Saharan Africa

The Main Idea

By 1914 most of the major European industrial powers had colonies in sub-Saharan Africa.

The Story Continues

By about 1900, European powers had carved most of sub-Saharan Africa into colonies and settlements. They justified colonization as a humanitarian need, rather than a drive for profit. “. . . Europe was impelled to the development of Africa primarily by the necessities of her people, and not by the greed of the capitalists,” explained one British observer.

Competition for West Africa

West Africa had been a major center of the slave trade. Europeans had slave trading posts along the coast. In the early 1800s, however, most European countries abolished the slave trade. These former slaving centers turned to other types of trade, such as palm oil, feathers, ivory, rubber, and other products from the interior. By the late 1800s, the Europeans had started to push inland. They were eager to control the sources of the products they traded.

Europeans did not gain African land easily. Often they met with fierce resistance. For example, the French fought for control of Senegal for several years. **Samory Touré** led a revolt against the French in Senegal. He continued fighting off and on from 1883 until 1898 when he was finally captured. By 1900 the French had claimed not only Senegal but also a vast area called French West Africa.

Great Britain also met resistance. When the British moved inland from the Gold Coast (modern Ghana), they came up against the powerful African kingdom of Ashanti. The Ashanti fought hard to keep their land. In the end Great Britain ruled all Ashanti territory, and the Gold Coast became a British colony.

By the early 1900s, France, Great Britain, Germany, Spain, and Portugal had claimed almost all of West Africa. Liberia, which had become a republic in 1847, was the only independent state in that area. Because former slaves from the United States had settled Liberia, the United States helped keep the country from becoming a European colony.

✓ **READING CHECK: Finding the Main Idea** Why did the Europeans want to control the interior of West Africa?

Competition for Central and East Africa

Journalist **Henry Stanley** fueled interest in central Africa. In 1869 the *New York Herald* hired Stanley to find Dr. David Livingstone, a missionary who had disappeared in central Africa. In 1871 Stanley finally found him, with a greeting that became famous throughout the world: “Dr. Livingstone, I presume?”

Stanley wrote many newspaper articles about his search for Dr. Livingstone. Stanley thought Europeans should develop the huge area he had explored. He tried but failed to interest the British government. Then he turned to King **Leopold II** of Belgium. Leopold, acting as a private citizen, carved out a personal colony of 900,000 square miles.

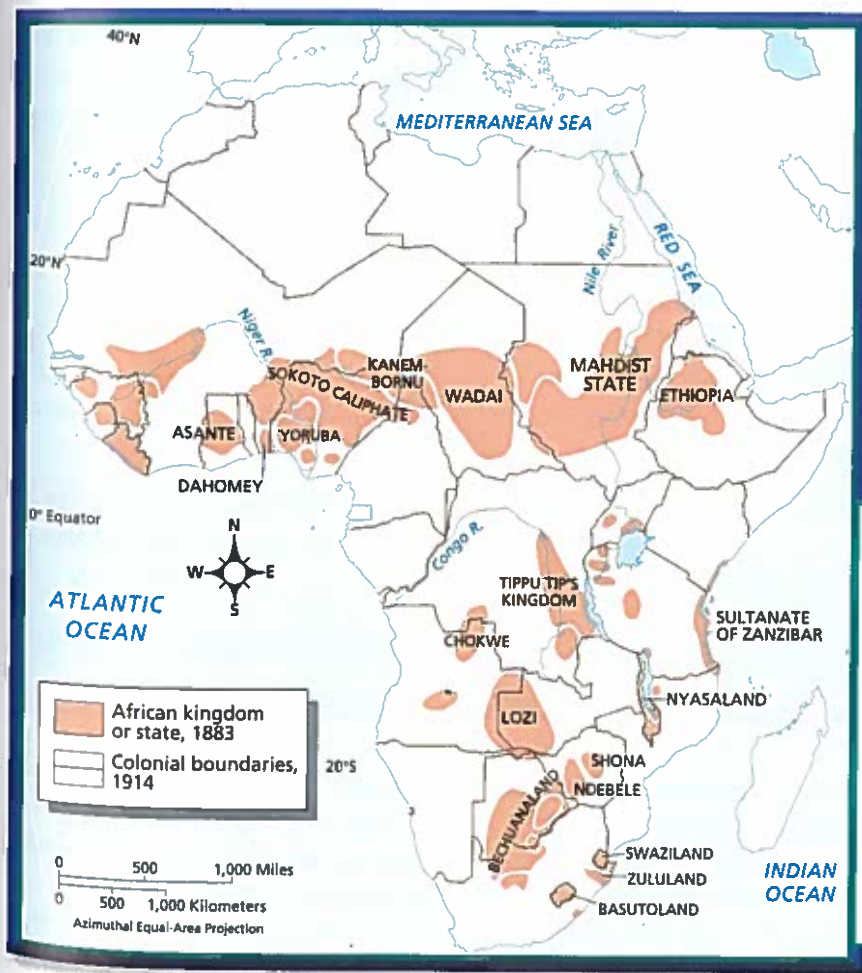
Leopold's rule of the Congo is an example of imperialism at its worst. His only interest was in getting as much wealth as possible. He sold business people the rights to take raw materials. They took great amounts of the Congo's natural rubber. Leopold also used slave labor. Other countries were outraged by what was happening in the Congo. Leopold finally turned over his private colony to the Belgian government and it became the Belgian Congo in 1908.

Just as in West Africa, the European nations divided East Africa into colonies. A famine helped the Europeans colonize East Africa. In the 1890s most of the cattle in East Africa died from rinderpest, a disease carried by cattle imported from Europe. After the disease killed their herds, the East Africans began to starve. The people were too weak to resist the Europeans.

✓ **READING CHECK: Identifying Cause and Effect** What did Sir Henry Stanley's writing have to do with the colonization of the Congo?

Competition for Southern Africa

European settlement in South Africa began in 1652. Dutch settlers founded Cape Town as a supply station for ships sailing to the East Indies. The Dutch settlement grew into a large colony called Cape Colony. In the early 1800s the British seized Cape Colony and it became a British possession.



HISTORY MAKER



Samory Touré
(c. 1830–1900)

Samory Touré was a Muslim reformer and great military leader. As a member of the Mandingo tribe in Guinea, Touré proclaimed himself a religious chief and set about building a great empire. Through his able administration and military leadership, Touré's kingdom became one of the largest empires in West Africa.

For 15 years, Touré fought against the French who wished to establish colonies in West Africa. In the end, his armies were defeated and Touré died in exile. **Why did Touré fight the French?**

African Boundaries, 1883–1914

Interpreting Maps Between the 1880s and 1914 European powers divided Africa among themselves without regard for native rights.

■ **Skills Assessment: Human Systems** What native African state had direct access to the Red Sea coastal trade in 1883?



Africa in 1914

Interpreting Maps By about 1914, most of the major European countries held colonies throughout Africa.

■ **Skills Assessment: 1. Human Systems** What native African states remained independent of European control during the colonial era? **2. Using Geography** What colony along the African coast of the Red Sea was held by France?

3. Drawing Inferences Why might the location of this French colony along the Red Sea coast have had great economic and military importance?

The Boers. When the British government took over, many people left the colony. They moved to the north and east in a mass migration. The move is known as the Great Trek. These people were descendants of the original Dutch settlers. They were called the **Boers**. The Boers spoke their own language, known as **Afrikaans**. In the new territories, the Boers carved out three colonies—Natal (nuh-TAHL), on the southeast coast, the Orange Free State to the west, and the Transvaal to the north.

As the Boers moved into the new territories, they came in contact with the Zulu who lived in the region. Under the great leader **Shaka**, the Zulu had created a thriving empire with a strong army. For years this army fought the Boers for control of the region. In 1879 the British joined in the war, defeating the Zulu and destroying their empire.

Rhodes and his influence. The discovery of diamonds in the Orange Free State and gold in the Transvaal increased competition in southern Africa. Germany hoped to find rich mineral reserves. In 1884 Germany declared a protectorate over the territory of South-West Africa. In the same year, Great Britain began moving inland from Cape Colony. British businessman **Cecil Rhodes** led this inland move.

Rhodes arrived in Cape Colony in 1870. He was a sickly young man who hoped the climate would improve his health. A short time later, Rhodes moved to the diamond fields in the Boer-controlled Orange Free State. He showed a great talent for business. Within 20 years of his arrival, Rhodes completely controlled South African diamond production. Later, Rhodes organized a huge colony farther north. This area was named Rhodesia (now Zimbabwe) after him. Rhodes hoped that one day Britain's control would extend from Cape Colony in South Africa to Cairo, Egypt, in the north.

The Boer War. In 1895 Rhodes sponsored a group who tried to overthrow the Transvaal government. The Boers in the Transvaal had kept the British from opening mines. The attempt failed, and relations between the Boers and the British became openly hostile. In 1899 the **Boer War**, known to modern South Africans as the South African War, broke out. After three years of costly fighting, the British defeated the Boers. As part of the settlement, the British were allowed to begin mining in the Transvaal.

To make sure the Boers stayed peaceful, the British allowed them to keep using the Afrikaans language in their schools and courts. The British also provided funds for Boers—though not for Africans—to rebuild their destroyed farms. In 1910 the British united Cape Colony and the three Boer colonies. It became the Union of South Africa. The new constitution made it almost impossible for nonwhites to ever get voting rights. This was the beginning of South Africa's system of racial segregation.

✓ **READING CHECK: Contrasting** In what ways did the British treat the Boers differently from the way they treated Africans?

The Effect of Imperialism on Africa

Imperialism was a difficult experience for all of Africa. In most areas, Europeans controlled all levels of government. This meant they controlled the lives of the people. Europeans based this type of government on their belief that Africans were not able to rule themselves. This way of ruling is called **paternalism**. Europeans governed their colonies in the same way that parents guide their children.

It is true that Africa did get some benefit from imperialism. New crops and new ways of farming were introduced in many areas. European medicine helped people live longer and healthier lives. Roads and railroads were built all over Africa.



INTERPRETING THE VISUAL RECORD

Zulu warrior This drawing from about 1875 depicts a Zulu warrior with shield, spears, and traditional dress. *Based on this drawing, how effective do you think Zulu weapons were against European firearms?*

**Holt
Researcher**



go.hrw.com

KEYWORD: Holt Researcher

FreeFind: Shaka

After reading more about Shaka on the Holt Researcher, create a time line of the significant events in his battle against the British.



CONNECTING TO GEOGRAPHY

The Berlin Conference

In 1884 European leaders met in Germany to resolve potential conflicts over African colonies. With no regard for the boundaries the Africans already had in place (which were often based on the location of ethnic groups), the Europeans carved up Africa among themselves. The decisions made at the Berlin Conference continue to hamper the continent's development.

Understanding Geography

How might the boundaries created by European leaders at the Berlin Conference have caused problems for the nations and people of Africa?

Even though the roads were mostly for European use, they did make it possible to get African products to the world markets. To some degree, too, this helped to improve communication in parts of Africa. It also helped to break down some of the barriers that had traditionally separated African peoples.

Some African leaders even sought out alliances with Europeans to benefit their countries. Often, however, the Europeans tried to take advantage of these alliances to the detriment of the Africans. For example, in 1889 Emperor **Menelik II** of Ethiopia negotiated a treaty with Italy. Menelik discovered, however, that the Italians were trying to trick him by showing him a copy of the treaty in his language that was different from the treaty in Italian, which gave the Europeans more power. Menelik's wife, Taitu, summed up her response to the Italians, "You wish Ethiopia to be represented before the other Powers as your protectorate, but this shall never be." When Italy tried to invade Ethiopia in 1896, Menelik's forces successfully fought them off.

Most other African nations were unable to stop the advance of outsiders. Instead, many resisted imperialism by insisting on maintaining their own identity. In spite of many years of control, most Africans never accepted European culture, even though Europeans hoped they would do so. The French even hoped for **assimilation**, which happens when people give up their own culture completely and adopt another culture.

It is not so surprising that the Africans did not accept European culture. After all, nearly everything the Europeans did was for their own benefit, not that of the Africans. Europeans did not think the Africans deserved to be treated equally. For their part, the Africans continued to live much as they had lived for centuries.



Emperor Menelik II of Ethiopia successfully resisted European imperialism.

✓ **READING CHECK: Making Generalizations** What effect did European colonization have on the African people?

SECTION 3 REVIEW

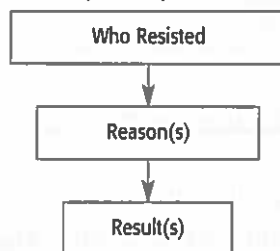
1. Define and explain the significance:

paternalism
assimilation

2. Identify and explain the significance:

Samory Touré
Sir Henry Stanley
Leopold II
Boers
Afrikaans
Shaka
Cecil Rhodes
Boer War
Menelik II

3. Categorizing Copy the model below. Use it to organize examples of African resistance to European expansion.



4. Finding the Main Idea

- What were the similarities and differences between Senegal and Liberia?
- What role did slavery play in the colonizing of Africa?
- How did imperialism affect Africa?

5. Writing and Critical Thinking

Identifying a Point of View Imagine that you are a European correspondent assigned to cover events in South Africa during the Boer War. Write a newspaper column in which you explain Great Britain's views of the actions and policies that led to war in South Africa.

Consider:

- British treatment of native Africans
- British attitudes toward the Boers
- how the British aimed to exploit Africa's natural resources



Homework Practice Online

keyword: SH3 HP17

SECTION

4

READ TO DISCOVER

- 1 What role did Great Britain play in the development of India?
- 2 How did Japan change its ancient and tradition-based culture in response to Western imperialism?
- 3 How did Western imperialism affect the peoples of Southeast Asia?
- 4 Why were European and American imperialists interested in the Pacific islands?

IDENTIFY

Meiji Restoration
Diet
Sino-Japanese War
Treaty of Shimonoseki
Mongkut
Liliuokalani
Emilio Aguinaldo

WHY IT MATTERS TODAY

The culture of modern India shows the effects of British imperialism. Use [CNN Current News](#) or other **current event** sources to explore the ways that Indian culture has been influenced by British rule. Record your findings in your journal.

[CNN Current News.com](#)

Expansion in Asia

The Main Idea

Western imperialism affected Asia and the Pacific in a variety of ways during the 1800s and 1900s.

The Story Continues As Western imperialism reached into Asia and the Pacific during the 1800s, native peoples often responded with resistance and conflict. One Indian writer described the nationalist ideals that grew in his country in the face of British imperialism: “The double policy of self-development and defensive resistance [against British colonial rule] is the common standing-ground of the new spirit all over India.”

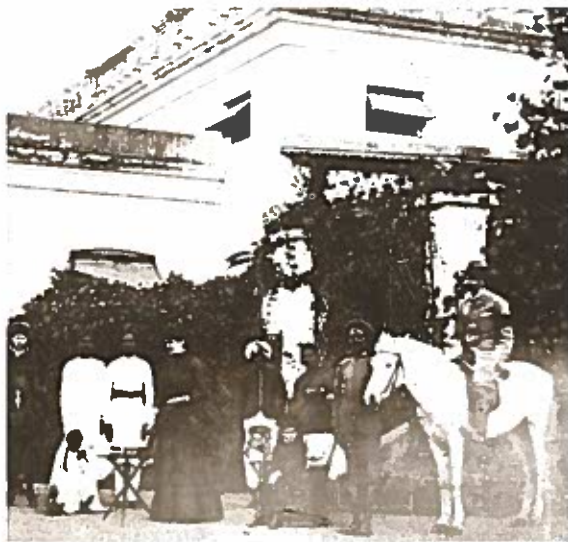
British Imperialism in India

During the early to mid-1800s, the British East India Company controlled a large area of India. This trading company treated India as a private colony. In 1857 Indian soldiers rebelled against the company. After that, the British government took direct control. Great Britain ruled about three-fifths of the Indian subcontinent. The rest was divided up into more than 550 states. An Indian prince headed each of these states.

The nature of British rule. Great Britain wanted to control both British India and the Indian states. The British used the old Roman method of divide and rule. It granted favors to those princes who cooperated with British rule and dealt harshly with those who did not. It treated Hindus and Muslims equally but did little to ease religious hatred between them.

The British were active rulers in India. They kept public order and ended the many local wars among the other states. They built roads, bridges, and railroads, established factories, hospitals, and schools, and tried to improve Indian farming methods. Many British families went to India and made it their permanent home.

By the early 1900s, British rule in India had created an unusual situation, with the people of two very different cultures living side by side. However, the two groups had little social contact with each other. The British had put themselves above Indian society.



INTERPRETING THE VISUAL RECORD

British colonials in India Members of an aristocratic British family in India, surrounded by their Indian servants, pose before their elegant estate. *How might an image such as this provoke feelings of resentment and nationalism among native Indians?*



These Indian and British teachers worked together at a school in India in the late 1800s.

They thought they were a superior race. They had private social circles that were open to any European, but closed to any Indian. For many years Indians were treated this way, regardless of their social status, education, or abilities.

Although the British did not socialize with Indians, the British system of education had a powerful impact on India. From 1899 on, the British colonial administration worked to establish Western-style schools of all levels throughout India. The classes were mostly taught in English. Students learned about Western ideas, such as democracy and socialism, along with the regular school subjects.

The rise of Indian nationalism. A movement for Indian self-rule began in the late 1800s. Not all Indian nationalists

supported the same approach. Some wanted to move toward independence gradually. These were usually people who had been educated in British schools. They also wanted to keep certain aspects of Western culture that they thought could benefit India.

Other Indians wanted to break all ties with Great Britain and sweep away the Western influence. The views of this second group alarmed Indian Muslims, who were a minority in the land. British rule protected them from violence. They feared that if British rule were removed their future might be in danger. The independence movement in India gathered strength very slowly. The British kept the country under a tight rein.

✓ **READING CHECK: Identifying Bias** How did the attitudes of the British affect the way they ruled in India?

Japanese Responses to Imperialism

While Britain was firmly in control of India, Japan was taking a different course. Westerners did not rule in Japan. Japan controlled its own government. However, the Japanese had been influenced by Western ideas. In response, Japan changed its form of government and began to industrialize.

The Meiji Restoration. In 1868 a group of samurai overthrew the Tokugawa shogunate. Then they returned the emperor to power. This change is called the **Meiji Restoration**. The samurai took action because they had grown impatient with Japan's old ways. They wanted a government and social system more like those in the West. They convinced the Meiji government to make broad changes.

One of the most important changes was to do away with the old system of social classes. Now all Japanese were free to choose what kind of work they wanted to do. The government also required that everyone should go to school. With this program, Japan almost wiped out illiteracy.

In 1899 the Japanese put into effect a new constitution that gave the Japanese people a say in their country's government by giving voting rights to some Japanese. However, only those people who owned a large amount of property were allowed to vote. Although the constitution gave the emperor supreme power, he did not use it. The new constitution also created a two-house national assembly called the **Diet**. One house of the Diet was made up of people who were elected. In the beginning, the elected house had very limited power. A small group of leaders acting in the name of the emperor held the real power in Japan.

Industrialization. Japan modernized very quickly. The government bought new factory machinery from Western countries and passed laws to encourage private citizens to start businesses. Also, in the 1880s the government sent students and leaders to the Western countries. They were to learn as much as they could about Western ideas. One of these leaders was Prince Itō Hirobumi. He was an outstanding statesman during this period. One trip he made was to the United States. While he was in San Francisco, he described Japan's hopes for the future.



“Today it is the earnest wish of both our Government and people to strive for the highest points of civilization enjoyed by more enlightened countries. Looking to this end, we have adopted their military, naval, scientific, and educational institutions, and knowledge has flowed to us freely in the wake of foreign commerce. . . . Japan cannot claim originality as yet, but it will aim to exercise practical wisdom by adopting the advantages and avoiding the errors. . . .”

Prince Itō Hirobumi from an 1880s speech given in San Francisco

By 1900 Japan had become the first country in Asia to industrialize. Japanese cities were linked together by railroads and telephones. Factories were making goods that could be sold to other countries. The textile industry was particularly strong. Japan exported machine-made cotton cloth and silk. The money the Japanese got from these exports paid for the imports they needed. They bought raw materials such as iron ore and crude oil. Japan used these raw materials to make steel and build ships. The country was much stronger than it had been before the Meiji Restoration.

The Sino-Japanese War. Even though Japan had modernized, it feared the imperialists in Asia. This fear led the Japanese to become imperialists themselves.

The area that most interested Japan was nearby Korea, which had been a dependent colony of China for a long time. China did not allow other countries to enter Korea. However, Russia, France, and the United States were all interested in trading there. Japan did not want these Western countries to have control of a country so near to their own.

In 1894 a rebellion broke out in Korea. The rebels wanted their people to be free from Chinese control. Both Japan and China sent armed forces to Korea. The situation exploded into the **Sino-Japanese War** (*sino* means Chinese). Foreigners predicted an easy victory for the large Chinese army. The Japanese, however, had done a better job of modernizing than China. They were well equipped and prepared. Japanese troops scored quick victories on both land and sea. In a surprisingly short time, Japan had defeated China.

In 1895 the **Treaty of Shimonoseki** ended the Sino-Japanese War. China was forced to give Korea its independence. Japan gained control of the island of Taiwan (Formosa) and some other small islands next to it. Japan also gained control of an area along the coast of Manchuria. In addition, Japan won the right to trade in China. This war between Japan and China marked the beginning of Japan as a major world power.

✓ **READING CHECK: Summarizing** How did Japan respond to Western imperialism?

Analyzing Primary Sources

Drawing Inferences What did Prince Itō mean when he said Japan “cannot claim originality as yet”?

This was the scene at Yokohama in 1871 as Prince Iwakura left on Japan's foreign mission to learn about Western countries.





Territory Claimed by:

 France	 Netherlands
 Germany	 United States
 Great Britain	 Chinese treaty port
 Japan	 Other city



Imperialism in East Asia to 1914

Interpreting Maps Western imperial powers controlled much of East and Southeast Asia by the early 1900s.

- **Skills Assessment: 1. The World in Spatial Terms** Which European power controlled the most area in this region?
- **Skills Assessment: 2. Analyzing Information** Why were China's treaty ports important to the Western powers?

Imperialism in Southeast Asia

In the late 1800s, European imperialism made its way to Southeast Asia as it did to nearby India. The area became an important source of spices and tea. Later, valuable products such as tin and oil came from this area.

British colonies. Great Britain had control of two important colonies in Southeast Asia—Burma and Singapore. It was natural that the British should take an interest in Burma, as it was on the eastern border of India. By 1886 all of Burma had come under British control.

The island of Singapore is on the tip of the Malay Peninsula. It guards the entrance to the Strait of Malacca. This is one of the world's most vital trade routes. Britain's first recorded contact with Singapore was in 1819, when a ship belonging to the British East India Company landed there. When the company representative learned that there were only a few residents he decided to purchase land for a factory site. The spot grew into the city of Singapore, which became an important naval base in the British Empire.

French gains. The eastern part of Southeast Asia contained three small nations, none of which had stable governments. At times they were under the influence of neighboring Siam (modern-day Thailand). In the 1800s, the French military took over the region and claimed it for France. Under French rule the governments of the three nations became more stable and their economies improved. The area became known as French Indochina. The original three nations regained their independence in the 1950s. Today they are the nations of Laos, Cambodia, and Vietnam.

The kingdom of Siam had a more stable government than the other parts of Southeast Asia. The country was well organized and well run. However, Siam had to deal with two European powers on its borders. The British had interests on one border and the French had interests on another. Both Great Britain and France nibbled at the borders of Siam. To keep their independence, Siamese rulers skillfully played British interests against French interests. King **Mongkut**, who ascended to power in 1851, was particularly good at such diplomacy. Mongkut studied Western ideas to understand his enemies and help modernize his country.

The British and French finally agreed that an independent Siam was useful as a buffer state between them. A buffer state is a country located between two hostile powers that serves to decrease the chance of war between the two powers.

The Dutch East Indies. The Dutch East Indies, now Indonesia, are a series of islands that run from the East Asian mainland 3,200 miles to the coast of Australia. The islands of Java, Sumatra, and Borneo are the largest of these islands. The Dutch first colonized the East Indies in the 1600s. In the late 1800s, several revolts convinced the government of the Netherlands to change the way they governed their richest colony. The Netherlands gradually reformed their colonial policies. The Dutch East Indies became the nation of Indonesia in 1949.

✓ **READING CHECK: Drawing Conclusions**
Why was Siam able to remain independent during the age of imperialism?



Chinese porcelain was imported to Europe, where it was considered quite valuable. This punch bowl depicts trading centers in Canton.

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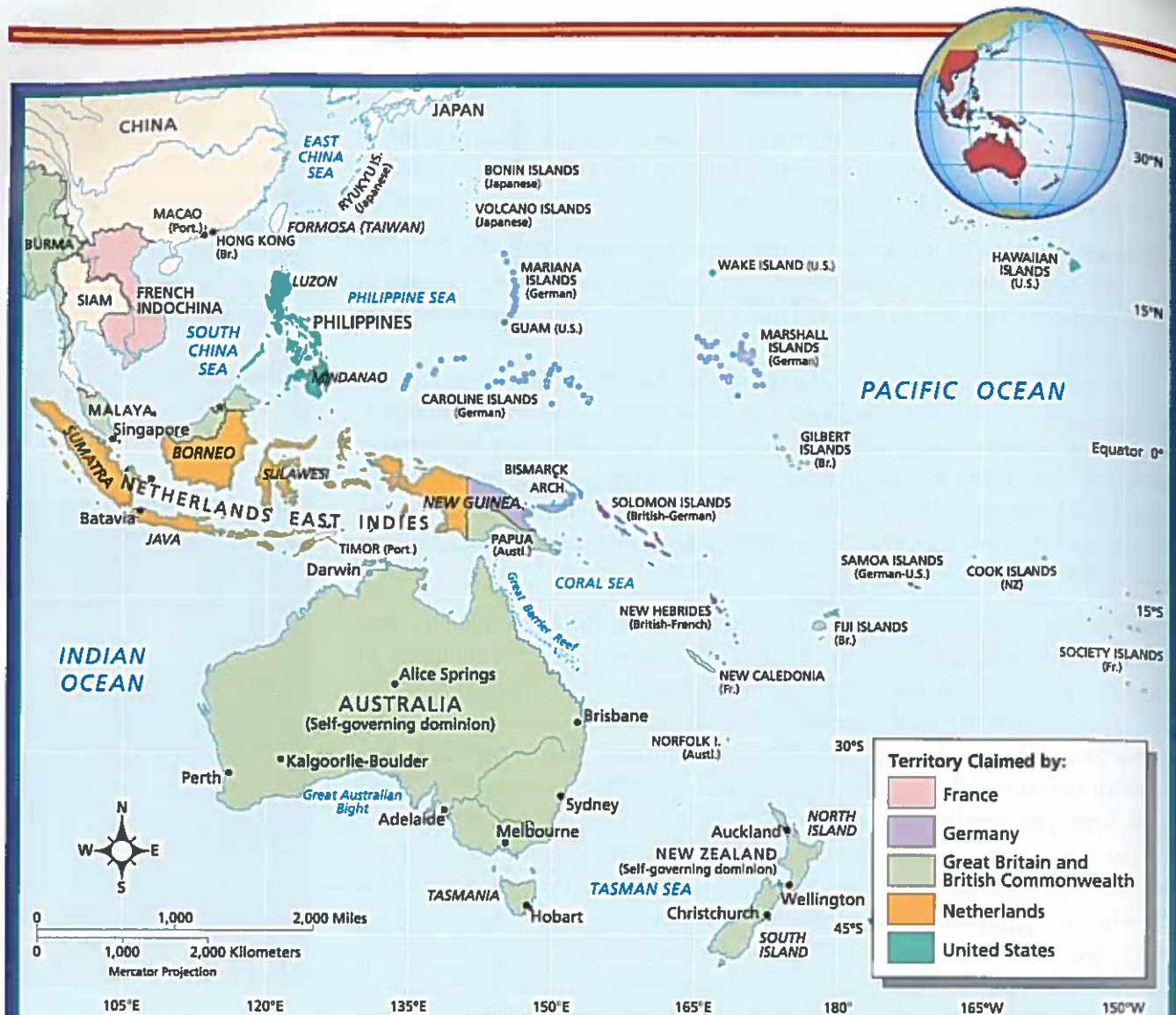
FreeFind: Mongkut

After reading more about Mongkut on the Holt Researcher, write an evaluation of his best and worst policies as king.



INTERPRETING THE VISUAL RECORD

King Mongkut Siam's King Mongkut worked hard to protect his country's independence in the 1800s. *How does this painting reflect the king's acceptance of some aspects of Western society?*



Imperialism in the Pacific to 1914

Interpreting Maps After its war with Spain in 1898 the United States became a greater imperial power in the Pacific.

■ **Skills Assessment: 1. Locate** What group of islands under U.S. control was closest to the treaty ports of mainland China?

U.S. Interests in the Pacific Islands

The imperialist powers were interested in only a few of the Pacific islands. Some islands had valuable natural resources. However, the Western powers mostly wanted islands for coaling stations and naval bases.

The Samoa Islands. In the late 1800s, a serious rivalry developed in the Samoa Islands. The United States had gained the right to use the harbor city of Pago Pago (PAHNG-oh PAHNG-oh) on the island of Tutuila (too-too-WEE-luh). Americans used it as a trading post, coaling station, and naval base. Great Britain and Germany had gotten similar rights in other parts of the Samoa Islands.

The rivalry among the three foreign powers continued for a number of years until the three came close to going to war. Finally, in 1899 the rivals signed a treaty. Great Britain, preoccupied with the Boer War, withdrew its interests. The United States

received firm control of Tutuila and six other small islands. Together these islands became American Samoa. Germany gained control of all the other islands in the Samoan group. They eventually became known as Western Samoa.

The Hawaiian Islands. The Hawaiian Islands were very important to the United States. They had an excellent harbor for a naval base, as well as rich soil, good rainfall, and a mild climate. After 1865 business people from the United States and other nations began to arrive. They started huge sugarcane and pineapple plantations. Soon they wanted more control over the island's government.

Hawaii's Queen **Liliuokalani** did not want foreigners to control Hawaii. She tried to change the treaties that allowed them to stay. In 1893 the business leaders gained enough power to end the queen's reign. The United States took over Hawaii in 1898.

The Philippines, Guam, and Wake Island. When Spain and the United States went to war in 1898 (see section 5), U.S. naval forces all over the world were ordered into action. The first battle of the war took place in the Spanish-controlled Philippines. Six ships under the command of Commodore George Dewey steamed from Hong Kong to Manila, the capital of the Philippines. Dewey's ships attacked the Spanish fleet in Manila harbor. The Spanish fleet was in poor repair and was destroyed in just a few hours. United States land forces followed. Within a few months, the Philippine Islands came under the control of the United States. At about this time, U.S. forces also took Guam, a small island east of the Philippines that Spain also controlled.

Some Filipinos welcomed the Americans. Some even fought with them against the Spanish. Many Filipinos, though, saw no reason to change one master for another. **Emilio Aguinaldo** led the Filipinos in a fight for independence. The Filipinos used guerrilla warfare against the better-equipped United States army. The war lasted for three hard years. The Filipinos were finally defeated in 1902.

Besides taking over the Philippine Islands and Guam, the United States also took control of Wake Island. This gave the United States a chain of islands running from its west coast across the Pacific to Asia.

✓ **READING CHECK: Making Predictions** What benefit do you think the United States gained from its Pacific islands later in the 1900s?

HISTORY MAKER



Queen Liliuokalani
(1838–1917)

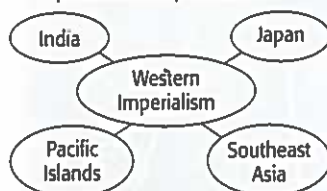
Queen Liliuokalani was the first woman ever to become ruler of the Hawaiian Islands. She was also the last.

As queen, Liliuokalani faced increasing pressure from American businessmen who wanted the islands to be a part of the United States. In order to avoid bloodshed, she agreed to step down from the throne. In so doing, she opened the way for the United States to annex Hawaii, a move she bitterly opposed. After leaving the throne, she withdrew from public life. **Why did Liliuokalani give up control of Hawaii?**

SECTION 4 REVIEW

1. Identify and explain the significance:
Meiji Restoration
Diet
Sino-Japanese War
Treaty of Shimonoseki
Mongkut
Liliuokalani
Emilio Aguinaldo

2. Evaluating Copy the web below. Use it to analyze and evaluate the ways in which each Asian region was affected by Western imperialism.



3. Finding the Main Idea

- How did British rule affect India?
- Why were the Japanese able to reform and industrialize their nation so quickly?
- How did United States expansion in Hawaii differ from its expansion in the Philippines?

4. Writing and Critical Thinking

Comparing and Contrasting Write two paragraphs about Western and Japanese imperialism in Asia. In the first paragraph describe the positive effects of imperialism in Asia. In the second paragraph describe the negative aspects of imperialism in the region.

Consider:

- improvements in Asia during the age of imperialism
- the effects of imperialism on Asian people
- how the imperialist powers exploited Asian land and resources



Homework Practice Online

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SECTION

5

READ TO DISCOVER

- 1 How was economic pressure used by imperialist powers to control Latin America?
- 2 What were the causes and outcomes of the Spanish-American War of 1898?
- 3 Why was the Panama Canal important?
- 4 What was the "Roosevelt Corollary" to the Monroe Doctrine?

IDENTIFY

Maine

Platt Amendment

Panama Canal

Carlos Juan Finlay

Roosevelt Corollary

Porfirio Díaz

Victoriano Huerta

Venustiano Carranza

Emiliano Zapata

Pancho Villa

WHY IT MATTERS TODAY

Because of its policies toward Latin America, the United States regularly gets involved in Latin American affairs. Use [CNN](http://cnn.com) or other **current event** sources to find examples of United States involvement in Latin America. Record your findings in your journal.

[CNN](http://cnn.com)

Imperialism in Latin America

The Main Idea

Imperialist powers controlled Latin America with economic influence and political intervention.

The Story Continues *The Monroe Doctrine kept European powers from colonizing Latin America. The United States flexed its military muscle to support its interests in Latin America. "In the Western Hemisphere the . . . Monroe Doctrine may force the United States . . . to the exercise of an international police power," President Theodore Roosevelt once threatened.*

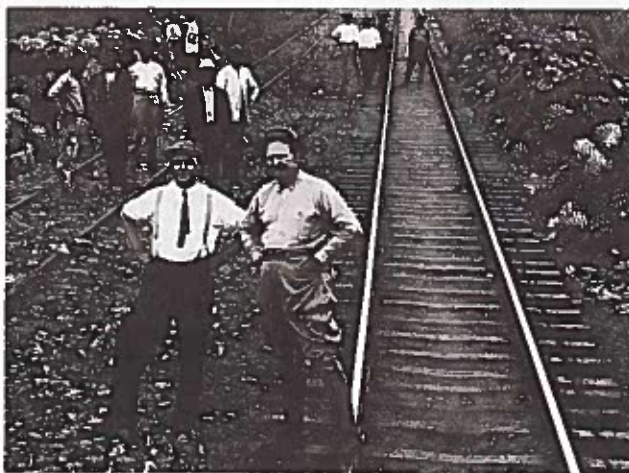
Economic Imperialism

By the end of the 1800s, the United States and Europe were buying many products from Latin America. Americans ate bananas from Central America, drank coffee from Brazil, and smoked Cuban cigars. Great Britain bought large amounts of wool and beef from Argentina. Any Latin American country with products to trade found people to buy them.

Europeans and Americans began to invest money in Latin America. They built factories and textile mills; bought ranches, plantations, and mines; and even owned railroads. Latin American governments thought it was a good idea to allow foreigners to buy land and spend money in their countries. They hoped these businesses would help their economies. The foreign investors, however, usually did not keep their money in Latin America. Instead they sent the money they made back to their own countries. This limited growth in the Latin American countries.

Some Latin American countries borrowed money from Europe or the United States. They used the money to make public improvements or strengthen their armies and navies. Sometimes a country could not pay back its loans. Foreign banks and business leaders persuaded their own governments to pressure any country that did not pay. Sometimes they sent ships and troops to force a country to pay.

✓ **READING CHECK: Finding the Main Idea** How did the Europeans and Americans control the economies of Latin American countries?



Britain and the United States funded many railroads in Latin America. This railroad was constructed through a banana plantation in Costa Rica.

The Spanish-American War

In 1898 the United States became deeply involved in Latin America. The problem grew out of disagreements with Spain over Cuba. The Caribbean island had been a Spanish colony for many years, but the Cubans were unhappy under Spanish rule. A rebellion had failed, and the situation was tense. This alarmed Americans who had businesses in Cuba. Also, many Americans thought Cuba should be free.

Anger boiled over in 1898. The *Maine*, an American battleship, exploded in Havana harbor, killing some 260 Americans. The *Maine* had been sent to Cuba to protect American citizens and their property. No one knew the cause of the explosion. Many in the United States assumed that the Spanish were to blame.

Spain wanted to avoid war, but it would not withdraw from Cuba. The United States declared war in April 1898. Congress stated that the United States was fighting only on behalf of Cuban independence and that America had no intention of taking the island for itself.

By May the war had started. The first battle ended with the defeat of the Spanish fleet in the Philippines. In July U.S. troops arrived in Cuba. With Cuban help, U.S. troops quickly defeated the Spanish. American writer Stephen Crane reported on the war for the *New York World* newspaper. Here he sums up the battle in which Theodore Roosevelt and his Rough Riders took part.



“No doubt when history begins to grind out her story we will find that many a thundering, fine, grand order was given for that day’s work; but after all there will be no harm in contending that the fighting line, the men and their regimental officers, took the hill chiefly because they knew they could take it, some having no orders and others disobeying whatever orders they had. . . . It will never be forgotten as long as America has a military history.”

Stephen Crane in the *New York World*, July 14, 1898

The Treaty of Paris ended the war in December 1898. By the terms of the peace treaty, Spain gave up its claim to Cuba. It also gave the United States another of its colonies, Puerto Rico, which became a commonwealth of the United States. In the Pacific, Spain gave up the Philippines and Guam.

Following the war, United States troops controlled Cuba. Americans started schools, built roads, and tried to improve health care. Doctors and nurses worked to wipe out yellow fever. After two years the United States allowed Cubans to elect their own government. A new Cuban assembly wrote a constitution, which included the **Platt Amendment**. This amendment said that Cuba could not transfer any land except to the United States. In addition, it gave the United States the right to intervene in Cuba. This could happen whenever the United States thought the stable government was in danger. The United States also insisted on having a permanent naval base in Cuba at Guantánamo Bay. In this way the United States continued to exert influence over Cuba.

✓ **READING CHECK: Identifying Cause and Effect** What were the effects of the Spanish-American War?



This painting depicts Theodore Roosevelt leading the Rough Riders into battle during the Spanish-American War.

Analyzing Primary Sources

Drawing Inferences What did Stephen Crane imply when he said the Americans “took the hill chiefly because they knew they could”?

The Panama Canal

Before the war, the American battleship *Oregon* had been stationed on the Pacific coast of the United States. When war became likely, the *Oregon* was sent to the Caribbean Sea. To reach the Caribbean, the battleship had to race around the entire South American continent. This was a distance of almost 13,000 miles. The United States realized it had a problem. It would either have to build two complete navies or find a quicker way to move ships between the Atlantic and Pacific Oceans.

The idea of a canal across the Isthmus of Panama was not new. The French company that built the Suez Canal had tried to build a canal across Panama, but their attempt had failed. In the late 1800s, the United States began talks with Colombia, which controlled Panama at that time. The United States wanted to lease a strip of land across the isthmus, but the Colombian government would not approve the lease. This angered people in the United States and Panama. Some business leaders in Panama led a revolt to gain freedom from Colombia.

American forces stationed in Panama prevented Colombia from putting down the revolt. The revolution succeeded. In 1903 the new government gave the United States the rights to build the canal. Work began in 1904.

The Panama Canal opened in 1914. It was one of the world's great engineering feats. It might have been impossible to build without new power shovels and other machines. Science, too, played an important part. A Cuban doctor named **Carlos Juan Finlay** discovered that mosquitoes carry yellow fever. The disease had killed many workers attempting to build the canal. By destroying the mosquitoes, scientists controlled the spread of the disease. This allowed construction crews to work in the Panamanian jungles.

The new canal shortened the sea route from New York to San Francisco by about 8,000 miles. Merchant ships of all nations paid a toll to use the canal. However, the greatly shortened route saved time and operating costs.

✓ **READING CHECK: Making Generalizations**

Why was the Panama Canal important for the United States?

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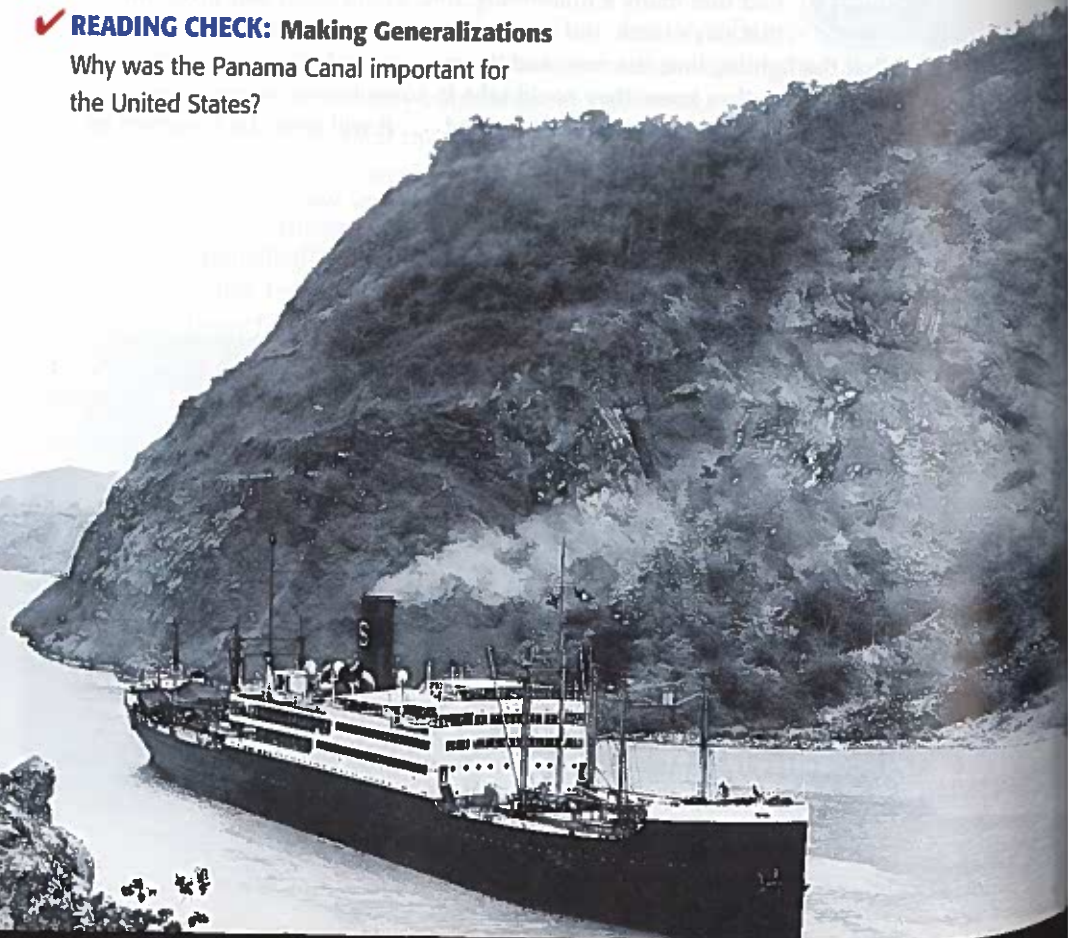
go.hrw.com

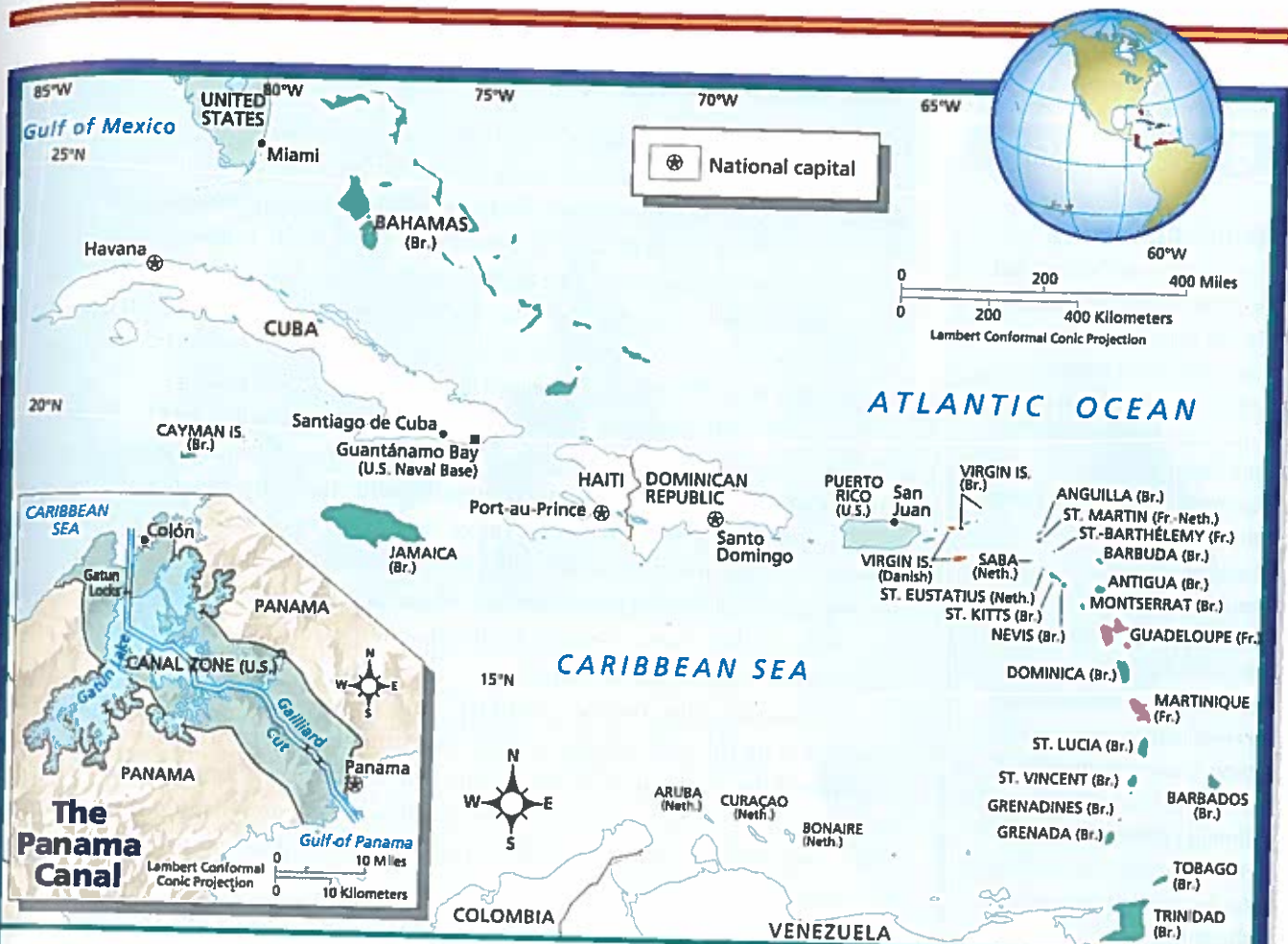
KEYWORD: Holt Researcher

FreeFind: Carlos Juan Finlay

After reading more about Carlos Juan Finlay on the Holt Researcher, write a summary of his contributions to medicine.

Over a period of 15 to 20 hours, oceangoing vessels moving through the Panama Canal pass through a series of locks and lakes as they move from the Atlantic Ocean to the Pacific Ocean.





Imperialism in the Caribbean, 1914

Interpreting Maps Like countries and territories in East and Southeast Asia and the Pacific, the Caribbean islands were dominated by foreign powers.

- **Skills Assessment: 1. Human Systems** How was the Panama Canal an example of imperialism in Latin America?
- 2. **Evaluating** How might its naval base at Guantánamo Bay help the United States to control the Caribbean region?

The Roosevelt Corollary

The United States knew it would have to protect the Panama Canal. It also knew Europeans might send armed forces to Latin America. To prevent this, the United States took a strong stand.

In 1904 President Theodore Roosevelt said that if the independence of any country in the Western Hemisphere were in danger, the United States would act to prevent other countries from entering. Also, the United States would make sure that Latin American countries would repay their loans. This is known as the **Roosevelt Corollary**. The corollary angered Latin Americans. To them, it sounded as if they could not manage their own governments. They were also against Americans forcing them to pay back their loans. In spite of this, the United States acted several times. It maintained a nearly continuous military presence in Nicaragua from 1912 to 1933. It did the same in Haiti and the Dominican Republic at about the same time. American troops were in Cuba from 1906 to 1909 and also intervened on other occasions.

- ✓ **READING CHECK: Drawing Conclusions** What effect do you think the Roosevelt Corollary had on relations between the United States and Latin America?

CONNECTING TO Economics

Dollar Diplomacy

Dollar diplomacy was started in 1909 by President William H. Taft to help Americans make money in other countries. It was used mainly in Central America and the Caribbean. American companies started businesses there. Then, the United States used its economic strength to protect the businesses. In this way, the business continued to make money and the United States maintained power in these nations. Over time, many people resisted U.S. efforts to control them through dollar diplomacy. By 1912 President Taft had given up on dollar diplomacy. Today the phrase is used to describe efforts by one country to control another through money.

Understanding Economics

How might American loans help a foreign country today?

Mexico's Revolution

During the age of imperialism, the greatest unrest in Latin America happened in Mexico. By 1910 Porfirio Díaz had been dictator for more than 30 years. Díaz had allowed foreign companies to take many of Mexico's natural resources. He had also allowed rich Mexicans to control much of the country's land. Most of the people were poor. They had no land of their own. In 1910 Díaz jailed Francisco Indalécio Madero, his opponent for the presidency. When that happened, a popular rebellion against the rule of Porfirio Díaz broke out in Mexico. The rebellion quickly spread throughout the country and soon became a general revolt against the government.

The next year Madero's followers brought him to power. In 1913 Victoriano Huerta, a member of Madero's own government, betrayed him and seized control of the government. Madero was taken prisoner and shot. This murder caused more rebellion. This time Venustiano Carranza led a revolt against Huerta that eventually developed into a violent civil war. The war dragged on for several years, and over one million lives were lost. An important part of the struggle was over land. Mexican peasants wanted their land returned to them. The peasant leader Emiliano Zapata (sah-PAH-tah) voiced their demands.

Americans who owned property and businesses in Mexico were very concerned by the war's threat to their investments. The continuing conflict also frightened the thousands of Americans who lived there. They wanted President Woodrow Wilson to send troops into Mexico. President Wilson did not want to start a war between Mexico and the United States. He decided instead to wait and see what happened.

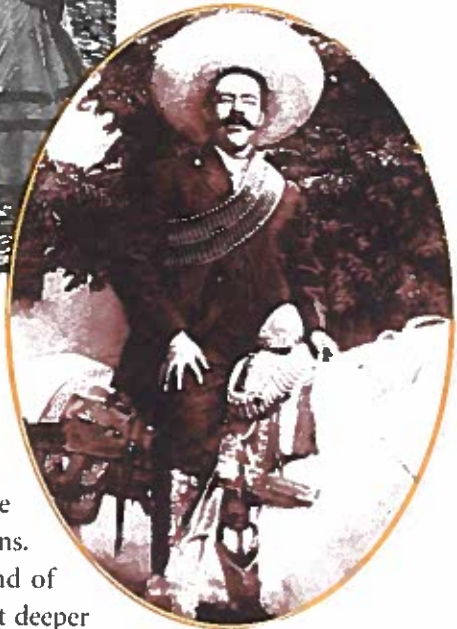
When some United States soldiers were arrested in Mexico in 1914, the United States finally decided to act. Marines took control of Veracruz, an important port on the Gulf of Mexico. This cut off supplies and money to the Huerta government. The action helped Carranza's forces win the war.



Mexican artist Diego Rivera painted murals dealing with the history and social problems of his country. *Struggle of the Classes* is in Mexico City.



Women played an important role in Mexico's revolution, as this photograph from 1911 illustrates.



Pancho Villa was a Mexican revolutionary and guerrilla leader.

The colorful rebel leader **Pancho Villa** (VEE-yah) continued to fight Carranza for control of the revolution. Villa led effective guerrilla attacks against the new government. He also attacked large landowners in Mexico, taking property and money to finance and supply the revolutionary army. In 1916, for reasons that are still not clearly understood, Villa moved his troops across the border into the United States. He raided the small town of Columbus, New Mexico, killing more than a dozen Americans. President Woodrow Wilson reluctantly sent troops under the command of General John Pershing into Mexico to capture Villa. As the U.S. force went deeper into Mexico, Carranza's government became more and more concerned. For a time there was a threat of war between Mexico and the United States. In 1917, however, the United States withdrew its troops from Mexico. Americans had started to pay attention to the world war that was taking place in Europe.

✓ **READING CHECK: Summarizing** What were the main causes of unrest and revolution in Mexico?

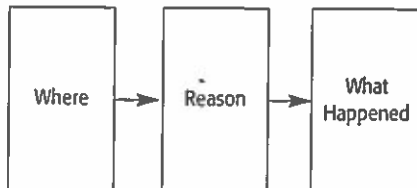
SECTION 5 REVIEW

1. **Identify** and explain the significance:

Maine
Platt Amendment
Panama Canal
Carlos Juan Finlay
Roosevelt Corollary
Porfirio Díaz
Victoriano Huerta
Venustiano Carranza
Emiliano Zapata
Pancho Villa

2. **Identifying Cause and Effect**

Copy the chart below. Use it to identify the causes and effects of United States military interventions in Latin America from 1898 to about 1933.



3. **Finding the Main Idea**

- Why were European and American investments no help to the economies of Latin American countries?
- What evidence shows that the United States wanted control over Cuba after the Spanish-American War?
- How might the United States and Mexico be different if the two countries had gone to war in 1916?

4. **Writing and Critical Thinking**

Summarizing Imagine you are a reporter in Panama during the building of the Panama Canal. Write an article describing what you observe.

Consider:

- working and living conditions in the Panamanian jungle
- physical health of the workers
- purposes of the canal

 **Homework Practice Online**
keyword: SH3 HP17

Creating a Time Line

Copy the time line below onto a sheet of paper. Complete the time line by filling in the events, individuals, and dates from the chapter that you think were significant. Pick three events and explain why you think they were significant.



Writing a Summary

Using standard grammar, spelling, sentence structure, and punctuation, write an overview of the events in the chapter.

Identifying People and Ideas

Identify the following terms or individuals and explain their significance:

- | | |
|-----------------------|-------------------------|
| 1. imperialism | 6. Boers |
| 2. dependent colonies | 7. Meiji Restoration |
| 3. Fashoda crisis | 8. <i>Maine</i> |
| 4. paternalism | 9. Roosevelt Corollary |
| 5. Leopold II | 10. Venustiano Carranza |

Understanding Main Ideas

Section 1 (pp. 470–473)

The Roots of Western Imperialism

- Why did the imperialists want to control regions with raw materials?
- Why were coaling stations important to the imperialists?

Section 2 (pp. 474–477)

European Claims in North Africa

- How would British control of the Suez Canal affect world trading patterns?
- What role did the al-Mahdt play in the history of the Sudan?

Section 3 (pp. 478–482)

European Claims in Sub-Saharan Africa

- Why was Leopold's rule in the Congo an example of imperialism at its worst?
- What role did Cecil Rhodes play in South Africa?

Section 4 (pp. 483–489)

Expansion in Asia

- What effect did British schools have in India?

- What did the Japanese do to industrialize their country?

Section 5 (pp. 490–495)

Imperialism in Latin America

- Why did Venustiano Carranza lead a revolt in Mexico?

Reviewing Themes

- Global Relations** What evidence is there that an industrialized country can control a country that is not industrialized?
- Geography** What evidence is there to show that areas were colonized because they met the transportation needs of other, more powerful countries?
- Economics** What evidence is there to show that areas were colonized for natural resources?

Thinking Critically

- Summarizing** Why did the industrialized nations of the West move to become imperialist powers?
- Comparing and Contrasting** What are the similarities and differences between the Platt Amendment and the Roosevelt Corollary?
- Drawing Inferences** How did the Sino-Japanese War mark Japan's growth as a world power?
- Supporting a Point of View** What evidence would you give that money was an effective means of control in Latin America?

Writing About History

Identifying a Point of View Write a report explaining the reasons for Western expansion into Africa, Asia, Latin America, and the Pacific, and describe what happened as a result of this expansion. Use the chart below to organize your thoughts before you write.

	Africa	Asia	Latin America	Pacific
Raw materials and products				
Resistance and rebellions				
Imperialist competition				

Building Social Studies Skills

Reading a Chart

Study the chart below. Then answer the questions that follow.

Foreign Investment in 1914 (in millions of U.S. dollars)

Area	British Investments	French Investments	American Investments
North America	7,000	500	900
Latin America	3,700	1,600	1,200
Africa	2,400	900	—
Asia	3,500	1,200	100

- Which statement correctly describes a relationship shown on the chart?
 - In 1914, the British and French invested more in North America than any other area.
 - In 1914, British investments worldwide were less than they had been in 1900.
 - French and American investments in Asia were increasing in 1914.
 - In 1914, Americans invested more in Latin America than all other areas combined.
- Why do you think British investments were greater worldwide than those of the French or the Americans? Give specific reasons for your viewpoint.

Categorizing Information

Read the paragraph below. Then answer the questions that follow.

As the great powers expanded their influence, scientists and adventurers explored uncharted territories. Arctic explorer Robert Edwin Peary from the United States is thought to be the first to reach the North Pole (April 6, 1909). Norwegian explorer Roald Amundsen was the leader of the first expedition to reach the South Pole, accomplished on December 14, 1911. In 1912, American archaeologist Hiram Bingham discovered the lost cities of the Inca in the Andes Mountains of Peru. Between 1875 and 1915, Prince Albert I of Monaco conducted surveys of the world's oceans. He collected marine specimens and took soundings.

- Which of the following gives the best categories for organizing the information in the paragraph?
 - Place Explored, Date Explored, Type of Exploration
 - Name, Where From, Place Explored, Date Explored
 - Name, Profession, Place Explored
 - Place Explored, Date Explored, Importance
- Do you think these explorations and others like them were important? Give specific reasons to support your point of view.

Alternative Assessment

Building Your Portfolio

Global Relations

Imperialism still exists in the world today. Use your textbook and other sources to find examples of imperialism today. Then, using knowledge you have gained by evaluating the actions of individuals, groups, and nations during the Age of Imperialism, write an analysis of why some nations still maintain colonies and how the colonized peoples have reacted to it.

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Internet Activity: go.hrw.com

KEYWORD: SH3 WH17

Choose a topic on the Age of Imperialism to:

- create an annotated time line on the political changes experienced by the territory once known as the Congo.
- write a report on the impact of colonization on the African people.
- write a series of journal entries from the point of view of Dr. Livingstone.

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Nationalism and Literature

Literature gives historians insight into past events and into people's feelings about those events. Leo Tolstoy (1828–1910) wrote about Napoléon's 1812 invasion of Russia in his novel *War and Peace*. He described how the Russians reacted to Napoléon's capture of their capital. In contrast, Giuseppe Garibaldi (1807–1882) used a speech to inspire troops, known as Red Shirts, fighting for Italian independence. He urged Italians to unite and fight for the new kingdom of Italy under King Victor Emmanuel II.

War and Peace by Leo Tolstoy

When half of Russia was conquered, and the inhabitants of Moscow were fleeing to remote provinces, and one levy of militia after another was being raised for the defense of the country, we not living at the time cannot help imagining that all the people in Russia, great and small alike, were engaged in doing nothing else but making sacrifices, saving their country, or weeping over its downfall. . . . In reality, it was not at all like that. . . . The majority of the people of that period took no heed of the general progress of public affairs, and were only influenced by their immediate personal interests. . . . The significance of the drama taking place in Russia at that time was the less easy to grasp, the closer the share a man was taking in it. In Petersburg, and in the provinces remote from Moscow, ladies and gentlemen in volunteer uniforms bewailed the fate of Russia and the ancient capital, and



talked of self-sacrifice, and so on. But in the army, which had retreated behind Moscow, men scarcely talked or thought at all about Moscow, and, gazing at the burning city, no one swore to be avenged on the French, but every one was thinking of the next quarter's pay due to him, of the next halting-place, . . . and so on.

Giuseppe Garibaldi speaks to his soldiers

We must now consider the period which is just drawing to a close as almost the last stage of our national resurrection, and prepare ourselves to finish worthily the marvelous design of the elect of twenty generations, the completion of which Providence has reserved for this fortunate age.



Yes, young men, Italy owes to you an undertaking which has merited the applause of the universe. You have conquered and you will conquer still. . . . To this wonderful page in our country's history another more glorious still will be added, and the slave shall show at last to his free brothers a sharpened sword forged from the links of his fetters.

To arms, then, all of you! all of you! And the oppressors and the mighty shall disappear like dust. . . .

Providence has presented Italy with Victor Emmanuel. Every Italian should rally round him. By the side of Victor Emmanuel every quarrel should be forgotten. Once more I repeat my battle-cry: "To arms, all—all of you."

Understanding Literature

How do both Tolstoy and Garibaldi attempt to inspire feelings of nationalism in people?

Science, Technology, and Society

The Industrial Revolution brought about a number of important developments in technology, communications, science, and medicine. Imagine that you are a student of history at Cambridge University in England during the late 1880s. You and your friends are making a “time capsule” that will contain artifacts, drawings, and descriptions of industrial life in the late 1800s. Your task is to create a list of the different items you would include. What would these items reveal about the role of technology and industry in the late 1800s? Use the bibliography below to help you.



This cartoon caricature shows Bismarck “sweeping away” German opposition to his policies of unification.

Further Reading

- Corrick, James.** *The Industrial Revolution.* San Diego: Lucent Books, 1998. A survey of the Industrial Revolution and its effects on Europe and the United States.
- Dersin, Denise, ed.** *What Life Was Like: In the Jewel of the Crown, British India, A.D. 1600–1905.* Alexandria, Virginia: Time-Life Books, 1999. A broad survey of political, social, and cultural life in British India.
- Shelston, Dorothy and Alan Shelston.** *The Industrial City, 1820–1870.* New York: Macmillan, 1990. A look at how industrialization changed the city.
- Smith, Bonnie G.** *Imperialism: A History in Documents.* New York: Oxford University Press, 2000. First-person accounts and political documents outlining the history of imperialism during the period 1850–1945.
- Tilly, Louise A. and Joan W. Scott.** *Women, Work and Family.* New York: Routledge, 1987. Discusses how the Industrial Revolution affected women in France and England.



Artifacts of the Industrial Age: a typewriter of 1874 (above) and a telegraph receiver of 1840 (right)

Government

During the second half of the nineteenth century a number of European countries underwent dramatic political change. Imagine that you are a newspaper editor in Berlin in 1870. You are a strong supporter of Otto von Bismarck and the cause of German national unification. Write an editorial in which you answer Bismarck’s critics and those who oppose unification of the German states under Prussian leadership. Explain why you support unification and admire Bismarck.

Internet Connect

Internet Activity

KEYWORD: SH3 U4

In assigned groups, develop a multimedia presentation that describes lifestyles of the Industrial Revolution. Choose information from the chapter Internet Connect activities and the Holt Researcher that best reflects the major topics of the period. Write an outline and a script for your presentation, which may be shown to the class.

