

UNIT
6

Industrialism and the Race for Empire 1700-1914





Although this painting shows Canton, China, the flags flying over the fenced-in areas near the shore are those of Spain, the United States, Great Britain, and the Netherlands. Canton was one of only two Chinese ports open to Westerners until 1842.

Comparing & Contrasting

Scientific and Technological Changes

In Unit 6, you will learn about scientific and technological changes that led to the Industrial Revolution and helped Western nations establish colonies around the world. At the end of the unit, you will have a chance to compare and contrast those changes. (See pages 830–835.)

The Industrial Revolution, 1700–1900

Essential Question

How did the Industrial Revolution begin and spread and how did it affect economics, politics, and society?



What You Will Learn

In this chapter you will learn about the key events of the Industrial Revolution and discover how the revolution affected economics and politics.

SECTION 1 The Beginnings of Industrialization

Main Idea The Industrial Revolution started in England and soon spread to other countries.

SECTION 2 Case Study Industrialization: Manchester

Main Idea The factory system changed the way people lived and worked, introducing a variety of problems.

SECTION 3 Industrialization Spreads

Main Idea The industrialization that began in Great Britain spread to other parts of the world.

SECTION 4 Reforming the Industrial World

Main Idea The Industrial Revolution led to economic, social, and political reforms.

Previewing Themes

SCIENCE AND TECHNOLOGY From the spinning jenny to the locomotive train, there was an explosion of inventions and technological advances. These improvements paved the way for the Industrial Revolution.

Geography *What other European countries besides England had coal, iron, and textile industries in the 1800s?*

EMPIRE BUILDING The global power balance shifted after the Industrial Revolution. This shift occurred because industrialized nations dominated the rest of the world.

Geography *Study the map. Which country appears to be the most industrialized?*

ECONOMICS The Industrial Revolution transformed economic systems. In part, this was because nations dramatically changed the way they produced and distributed goods.

Geography *What geographic factors might have encouraged the development of industry in certain places?*

EUROPE AND UNITED STATES

1700

1701
Jethro Tull invents seed drill. ▶



1765
James Watt builds steam engine.

1750

WORLD

1736
Qian-long begins his reign as emperor of China. (Imperial Palace compound at Beijing) ▶





Industry in Europe, 1870

Industrialization 1870

- City population greater than 250,000
- Major railroads constructed by 1870

Industry

- Ironworking
- Textile industry
- Coal mining



HISTORY

Andrew Carnegie: Prince of Steel

hmsocialstudies.com VIDEO

1793
Eli Whitney invents cotton gin. ▶



1848
Marx and Engels publish *The Communist Manifesto*. ▶



1875
British unions win right to strike.

1800

1850

1900

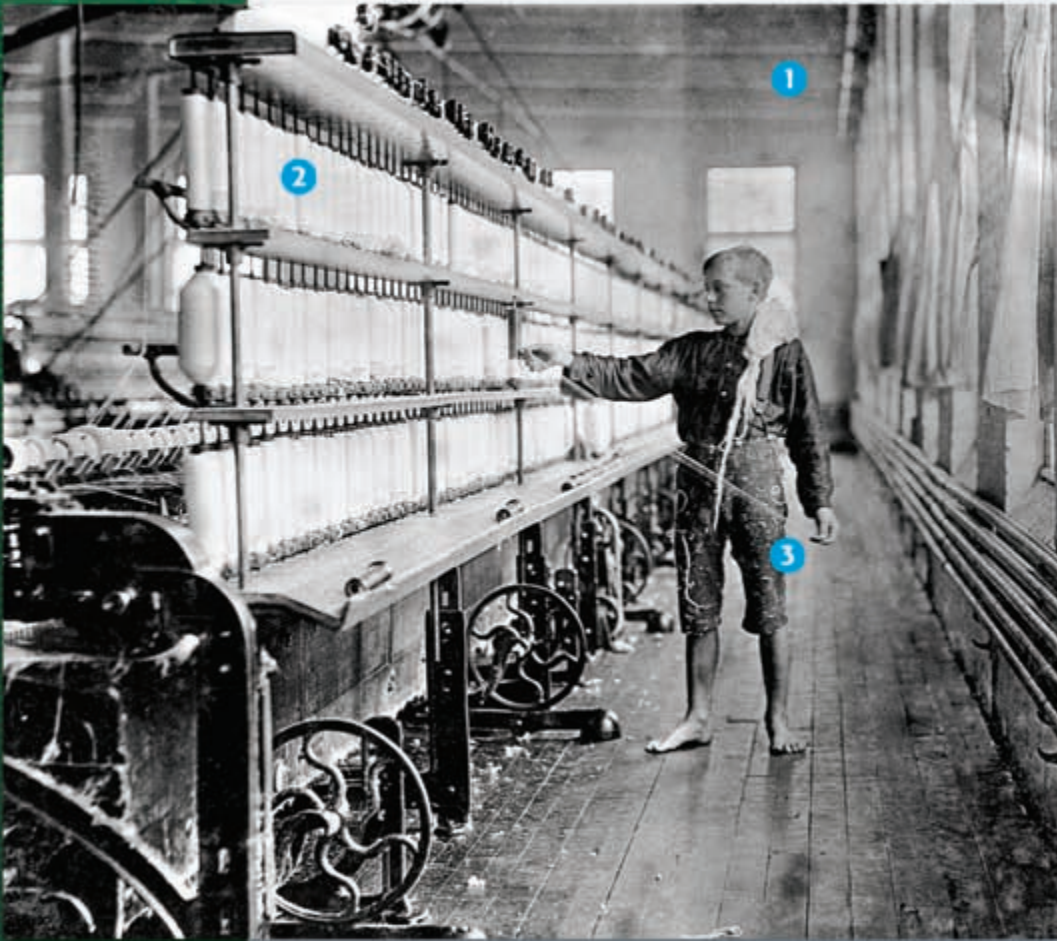
1804
Haiti wins freedom from France.

1867
Meiji era begins a period of modernization in Japan.

1869
Suez Canal opens in Africa.

What are fair working conditions?

You are a 15-year-old living in England where the Industrial Revolution has spurred the growth of thousands of factories. Cheap labor is in great demand. Like millions of other teenagers, you do not go to school. Instead, you work in a factory 6 days a week, 14 hours a day. The small pay you receive is needed to help support your family. You trudge to work before dawn every day and work until after sundown. Inside the workplace the air is hot and foul, and after sunset it is so dark it is hard to see. Minding the machines is exhausting, dirty, and dangerous.



1 Long hours: The sun may be shining through the windows as this child's day begins, but it will have disappeared by the time his day ends.

2 Dangerous machines: Children usually worked in bare feet with no safety equipment among machines with many moving parts.

3 Hot temperatures and dust-filled air: Dust particles from thousands of bobbins cling to the clothing and hang in air heated by the machinery.

EXAMINING *the* ISSUES

- **Would you attempt to change your working conditions in the factory?**
- **Would you join a union, go to school, or run away?**

In small groups, discuss these questions. Share your conclusions with your class. In your discussions, think about how children lived in preindustrial and industrial societies all over the world. As you read about the changes caused by industrialization, note how reform movements eventually improved conditions for most laborers.

The Beginnings of Industrialization

MAIN IDEA

SCIENCE AND TECHNOLOGY

The Industrial Revolution started in England and soon spread to other countries.

WHY IT MATTERS NOW

The changes that began in Britain paved the way for modern industrial societies.

TERMS & NAMES

- Industrial Revolution
- enclosure
- crop rotation
- industrialization
- factors of production
- factory
- entrepreneur

SETTING THE STAGE In the United States, France, and Latin America, political revolutions brought in new governments. A different type of revolution now transformed the way people worked. The **Industrial Revolution** refers to the greatly increased output of machine-made goods that began in England in the middle 1700s. Before the Industrial Revolution, people wove textiles by hand. Then, machines began to do this and other jobs. Soon the Industrial Revolution spread from England to Continental Europe and North America.

Industrial Revolution Begins in Britain

In 1700, small farms covered England's landscape. Wealthy landowners, however, began buying up much of the land that village farmers had once worked. The large landowners dramatically improved farming methods. These innovations amounted to an agricultural revolution.

The Agricultural Revolution Paves the Way After buying up the land of village farmers, wealthy landowners enclosed their land with fences or hedges. The increase in their landholdings enabled them to cultivate larger fields. Within these larger fields, called **enclosures**, landowners experimented with more productive seeding and harvesting methods to boost crop yields. The enclosure movement had two important results. First, landowners tried new agricultural methods. Second, large landowners forced small farmers to become tenant farmers or to give up farming and move to the cities.

Jethro Tull was one of the first of these scientific farmers. He saw that the usual way of sowing seed by scattering it across the ground was wasteful. Many seeds failed to take root. He solved this problem with an invention called the seed drill in about 1701. It allowed farmers to sow seeds in well-spaced rows at specific depths. A larger share of the seeds took root, boosting crop yields.

Rotating Crops The process of **crop rotation** proved to be one of the best developments by the scientific farmers. The process improved upon older methods of crop rotation, such as the medieval three-field system. One year, for example, a farmer might plant a field with wheat, which exhausted soil nutrients. The next year he planted a root crop, such as turnips, to restore nutrients. This might be followed in turn by barley and then clover.



Use the graphic organizer online to take notes on important events in Britain's industrialization.

► An English farmer plants his fields in the early 1700s using a seed drill.



Livestock breeders improved their methods too. In the 1700s, for example, Robert Bakewell increased his mutton (sheep meat) output by allowing only his best sheep to breed. Other farmers followed Bakewell's lead. Between 1700 and 1786, the average weight for lambs climbed from 18 to 50 pounds. As food supplies increased and living conditions improved, England's population mushroomed. An increasing population boosted the demand for food and goods such as cloth. As farmers lost their land to large enclosed farms, many became factory workers. **A**

Why the Industrial Revolution Began in England In addition to a large population of workers, the small island country had extensive natural resources. **Industrialization**, which is the process of developing machine production of goods, required such resources. These natural resources included

- water power and coal to fuel the new machines
- iron ore to construct machines, tools, and buildings
- rivers for inland transportation
- harbors from which merchant ships set sail

In addition to its natural resources, Britain had an expanding economy to support industrialization. Businesspeople invested in the manufacture of new inventions. Britain's highly developed banking system also contributed to the country's industrialization. People were encouraged by the availability of bank loans to invest in new machinery and expand their operations. Growing overseas trade, economic prosperity, and a climate of progress led to the increased demand for goods.

Britain's political stability gave the country a tremendous advantage over its neighbors. Though Britain took part in many wars during the 1700s, none occurred on British soil. Their military successes gave the British a positive attitude. Parliament also passed laws to help encourage and protect business ventures. Other countries had some of these advantages. But Britain had all the **factors of production**, the resources needed to produce goods and services that the Industrial Revolution required. They included land, labor, and capital (or wealth).

Inventions Spur Industrialization

In an explosion of creativity, inventions now revolutionized industry. Britain's textile industry clothed the world in wool, linen, and cotton. This industry was the first to be transformed. Cloth merchants boosted their profits by speeding up the process by which spinners and weavers made cloth.

Changes in the Textile Industry As you will learn in the feature on textile technology on page 719, by 1800, several major inventions had modernized the cotton industry. One invention led to another. In 1733, a machinist named John Kay made a shuttle that sped back and forth on wheels. This flying shuttle, a boat-shaped piece

MAIN IDEA

Recognizing Effects

A How did population growth spur the Industrial Revolution?

Textiles Industrialize First

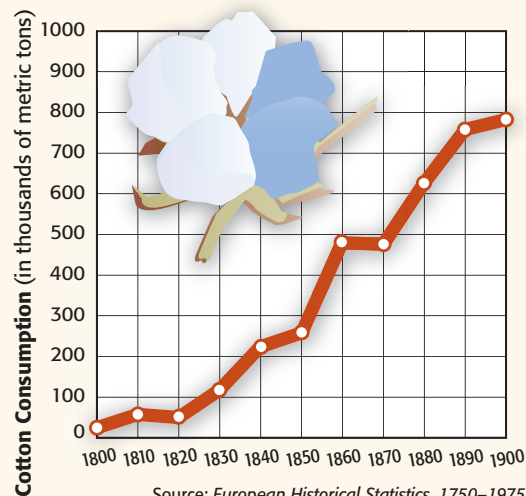
The Industrial Revolution that began in Britain was spurred by a revolution in technology. It started in the textile industry, where inventions in the late 1700s transformed the manufacture of cloth. The demand for clothing in Britain had greatly increased as a result of the population boom caused by the agricultural revolution. These developments, in turn, had an impact worldwide. For example, the consumption of cotton rose dramatically in Britain (see graph at right). This cotton came from plantations in the American South, where cotton production skyrocketed from 1820 to 1860 in response to demand from English textile mills.

► John Kay's flying shuttle (below) speedily carried threads of yarn back and forth when the weaver pulled a handle on the loom. The flying shuttle greatly increased the productivity of weavers.



▲ Flying shuttle

British Cotton Consumption, 1800–1900



Source: *European Historical Statistics, 1750–1975*

Connect to Today

1. Synthesizing How might the technological innovation and industrialization that took place in the textile industry during the Industrial Revolution have provided a model for other industries?

See Skillbuilder Handbook, Page R21.

2. Recognizing Effects Research the textile industry today to learn how it has been affected by new technology, including computerization. Prepare a two-paragraph summary on the effects of the new technology.



Inventions in America

In the United States, American inventors worked at making railroad travel more comfortable, inventing adjustable upholstered seats. They also revolutionized agriculture, manufacturing, and communications:

- 1831** Cyrus McCormick's reaper boosted American wheat production.
- 1837** Samuel F. B. Morse, a New England painter, first sent electrical signals over a telegraph.
- 1851** I. M. Singer improved the sewing machine by inventing a foot treadle (see photograph).
- 1876** Scottish-born inventor Alexander Graham Bell patented the telephone.

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INTERNET ACTIVITY Go online to create a photo exhibit on American inventions of the 19th century. Include the name of the inventor and the date with each photograph.

of wood to which yarn was attached, doubled the work a weaver could do in a day. Because spinners could not keep up with these speedy weavers, a cash prize attracted contestants to produce a better spinning machine. Around 1764, a textile worker named James Hargreaves invented a spinning wheel he named after his daughter. His spinning jenny allowed one spinner to work eight threads at a time.

At first, textile workers operated the flying shuttle and the spinning jenny by hand. Then, Richard Arkwright invented the water frame in 1769. This machine used the waterpower from rapid streams to drive spinning wheels. In 1779, Samuel Crompton combined features of the spinning jenny and the water frame to produce the spinning mule. The spinning mule made thread that was stronger, finer, and more consistent than earlier spinning machines. Run by waterpower, Edmund Cartwright's power loom sped up weaving after its invention in 1787. **B**

The water frame, the spinning mule, and the power loom were bulky and expensive machines. They took the work of spinning and weaving out of the house. Wealthy textile merchants set up the machines in large buildings called **factories**. Factories needed waterpower, so the first ones were built near rivers and streams:

PRIMARY SOURCE

A great number of streams . . . furnish water-power adequate to turn many hundred mills: they afford the element of water, indispensable for scouring, bleaching, printing, dyeing, and other processes of manufacture: and when collected in their larger channels, or employed to feed canals, they supply a superior inland navigation, so important for the transit of raw materials and merchandise.

EDWARD BAINS, *The History of Cotton Manufacture in Great Britain* (1835)

England's cotton came from plantations in the American South in the 1790s. Removing seeds from the raw cotton by hand was hard work. In 1793, an American inventor named Eli Whitney invented a machine to speed the chore. His cotton gin multiplied the amount of cotton that could be cleaned. American cotton production skyrocketed from 1.5 million pounds in 1790 to 85 million pounds in 1810.

MAIN IDEA

Summarizing

B What inventions transformed the textile industry?

Improvements in Transportation

Progress in the textile industry spurred other industrial improvements. The first such development, the steam engine, stemmed from the search for a cheap, convenient source of power. As early as 1705, coal miners were using steam-powered pumps to remove water from deep mine shafts. But this early model of a steam engine gobbled great quantities of fuel, making it expensive to run.

Watt's Steam Engine James Watt, a mathematical instrument maker at the University of Glasgow in Scotland, thought about the problem for two years. In 1765, Watt figured out a way to make the steam engine work faster and more efficiently while burning less fuel. In 1774, Watt joined with a businessman named Matthew Boulton. Boulton was an **entrepreneur** (AHN•truh•pruh•NUR), a person who organizes, manages, and takes on the risks of a business. He paid Watt a salary and encouraged him to build better engines.

Water Transportation Steam could also propel boats. An American inventor named Robert Fulton ordered a steam engine from Boulton and Watt. He built a steamboat called the *Clermont*, which made its first successful trip in 1807. The *Clermont* later ferried passengers up and down New York's Hudson River.

In England, water transportation improved with the creation of a network of canals, or human-made waterways. By the mid-1800s, 4,250 miles of inland channels slashed the cost of transporting both raw materials and finished goods.

Road Transportation British roads improved, too, thanks largely to the efforts of John McAdam, a Scottish engineer. Working in the early 1800s, McAdam equipped road beds with a layer of large stones for drainage. On top, he placed a carefully smoothed layer of crushed rock. Even in rainy weather heavy wagons could travel over the new "macadam" roads without sinking in mud.

Private investors formed companies that built roads and then operated them for profit. People called the new roads turnpikes because travelers had to stop at toll-gates (turnstiles or turnpikes) to pay tolls before traveling farther.

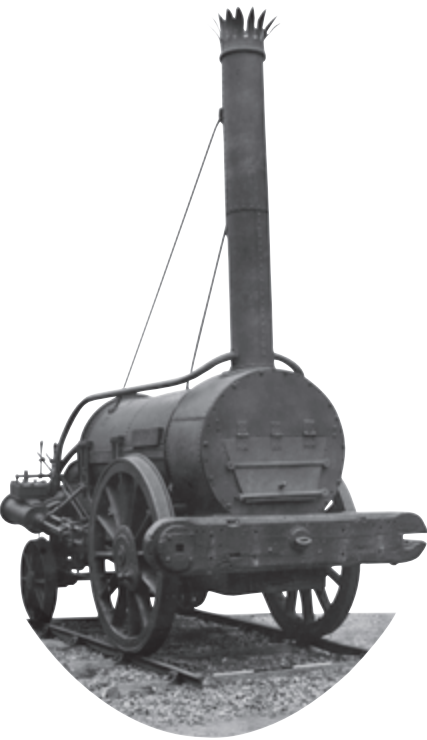
The Railway Age Begins

Steam-driven machinery powered English factories in the late 1700s. A steam engine on wheels—the railroad locomotive—drove English industry after 1820.

Steam-Driven Locomotives In 1804, an English engineer named Richard Trevithick won a bet of several thousand dollars. He did this by hauling ten tons of iron over nearly ten miles of track in a steam-driven locomotive. Other British engineers soon built improved versions of Trevithick's locomotive. One of these early

▼ First-class passengers on the Liverpool-Manchester Railway in the 1830s rode in covered cars; all others, in open cars.





▲ George Stephenson's Rocket

railroad engineers was George Stephenson. He had gained a solid reputation by building some 20 engines for mine operators in northern England. In 1821, Stephenson began work on the world's first railroad line. It was to run 27 miles from the Yorkshire coal fields to the port of Stockton on the North Sea. In 1825, the railroad opened. It used four locomotives that Stephenson had designed and built.

The Liverpool-Manchester Railroad News of this success quickly spread throughout Britain. The entrepreneurs of northern England wanted a railroad line to connect the port of Liverpool with the inland city of Manchester. The track was laid. In 1829, trials were held to choose the best locomotive for use on the new line. Five engines entered the competition. None could compare with the *Rocket*, designed by Stephenson and his son.

Smoke poured from the *Rocket's* tall smokestack, and its two pistons pumped to and fro as they drove the front wheels. The locomotive hauled a 13-ton load at an unheard-of speed—more than 24 miles per hour. The Liverpool-Manchester Railway opened officially in 1830. It was an immediate success.

Railroads Revolutionize Life in Britain The invention and perfection of the locomotive had at least four major effects. First, railroads spurred industrial growth by giving manufacturers a cheap way to transport materials and finished products. Second, the railroad boom created hundreds of thousands of new jobs for both railroad workers and miners. These miners provided iron for the tracks and coal for the steam engines. Third, the railroads boosted England's agricultural and fishing industries, which could transport their products to distant cities.

Finally, by making travel easier, railroads encouraged country people to take distant city jobs. Also, railroads lured city dwellers to resorts in the countryside. Like a locomotive racing across the country, the Industrial Revolution brought rapid and unsettling changes to people's lives. **C**

MAIN IDEA

Synthesizing

C How did improvements in transportation promote industrialization in Britain?

SECTION

1

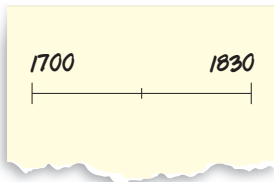
ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- Industrial Revolution
- enclosure
- crop rotation
- industrialization
- factors of production
- factory
- entrepreneur

USING YOUR NOTES

2. Which of the events listed do you think was the most important? Explain.



MAIN IDEAS

3. What were four factors that contributed to industrialization in Britain?
4. How did rising population help the Industrial Revolution?
5. What American invention aided the British textile industry?

CRITICAL THINKING & WRITING

6. **EVALUATING** Was the revolution in agriculture necessary to the Industrial Revolution? Explain.
7. **MAKING INFERENCES** What effect did entrepreneurs have upon the Industrial Revolution?
8. **FORMING AND SUPPORTING OPINIONS** Do you agree or disagree with the statement that the steam engine was the greatest invention of the Industrial Revolution? Why?
9. **WRITING ACTIVITY** **SCIENCE AND TECHNOLOGY** Write a **letter**, as a British government official during the Industrial Revolution, to an official in a nonindustrial nation explaining how the railroad has changed Britain.

CONNECT TO TODAY CREATING AN ILLUSTRATED NEWS ARTICLE

Find information on a recent agricultural or technological invention or improvement. Write a two-paragraph **news article** about its economic effects and include an illustration, if possible.

Industrialization

CASE STUDY: Manchester

MAIN IDEA

ECONOMICS The factory system changed the way people lived and worked, introducing a variety of problems.

WHY IT MATTERS NOW

Many less-developed countries are undergoing the difficult process of industrialization today.

TERMS & NAMES

- urbanization
- middle class

SETTING THE STAGE The Industrial Revolution affected every part of life in Great Britain, but proved to be a mixed blessing. Eventually, industrialization led to a better quality of life for most people. But the change to machine production initially caused human suffering. Rapid industrialization brought plentiful jobs, but it also caused unhealthy working conditions, air and water pollution, and the ills of child labor. It also led to rising class tensions, especially between the working class and the middle class.

Industrialization Changes Life

The pace of industrialization accelerated rapidly in Britain. By the 1800s, people could earn higher wages in factories than on farms. With this money, more people could afford to heat their homes with coal from Wales and dine on Scottish beef. They wore better clothing, too, woven on power looms in England's industrial cities. Cities swelled with waves of job seekers.

Industrial Cities Rise For centuries, most Europeans had lived in rural areas. After 1800, the balance shifted toward cities. This shift was caused by the growth of the factory system, where the manufacturing of goods was concentrated in a central location. Between 1800 and 1850, the number of European cities boasting more than 100,000 inhabitants rose from 22 to 47. Most of Europe's urban areas at least doubled in population; some even quadrupled. This period was one of **urbanization**—city building and the movement of people to cities.



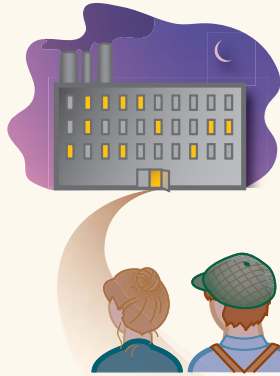
Use the graphic organizer online to take notes on the section's main ideas and details.



◀ As cities grew, people crowded into tenements and row houses such as these in London.

The Day of a Child Laborer, William Cooper

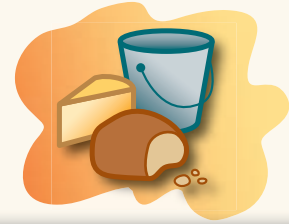
William Cooper began working in a textile factory at the age of ten. He had a sister who worked upstairs in the same factory. In 1832, Cooper was called to testify before a parliamentary committee about the conditions among child laborers in the textile industry. The following sketch of his day is based upon his testimony.



5 A.M. The workday began. Cooper and his sister rose as early as 4:00 or 4:30 in order to get to the factory by 5:00. Children usually ate their breakfast on the run.



12 NOON The children were given a 40-minute break for lunch. This was the only break they received all day.



Factories developed in clusters because entrepreneurs built them near sources of energy, such as water and coal. Major new industrial centers sprang up between the coal-rich area of southern Wales and the Clyde River valley in Scotland. But the biggest of these centers developed in England. (See map on page 715.)

Britain's capital, London, was the country's most important city. It had a population of about one million people by 1800. During the 1800s, its population exploded, providing a vast labor pool and market for new industry. London became Europe's largest city, with twice as many people as its closest rival (Paris). Newer cities challenged London's industrial leadership. Birmingham and Sheffield became iron-smelting centers. Leeds and Manchester dominated textile manufacturing. Along with the port of Liverpool, Manchester formed the center of Britain's bustling cotton industry. During the 1800s, Manchester experienced rapid growth from around 45,000 in 1760 to 300,000 by 1850.

Living Conditions Because England's cities grew rapidly, they had no development plans, sanitary codes, or building codes. Moreover, they lacked adequate housing, education, and police protection for the people who poured in from the countryside to seek jobs. Most of the unpaved streets had no drains, and garbage collected in heaps on them. Workers lived in dark, dirty shelters, with whole families crowding into one bedroom. Sickness was widespread. Epidemics of the deadly disease cholera regularly swept through the slums of Great Britain's industrial cities. In 1842, a British government study showed an average life span to be 17 years for working-class people in one large city, compared with 38 years in a nearby rural area.

Elizabeth Gaskell's *Mary Barton* (1848) is a work of fiction. But it presents a startlingly accurate portrayal of urban life experienced by many at the time. Gaskell provides a realistic description of the dank cellar dwelling of one family in a Manchester slum:

▼ Elizabeth Gaskell (1810–1865) was a British writer whose novels show a sympathy for the working class.



PRIMARY SOURCE **A**

You went down one step even from the foul area into the cellar in which a family of human beings lived. It was very dark inside. The window-panes many of them were broken and stuffed with rags . . . the smell was so fetid [foul] as almost to knock the two men down. . . they began to penetrate the thick darkness of the place, and to see three or four little children rolling on the damp, nay wet brick floor, through which the stagnant, filthy moisture of the street oozed up.

ELIZABETH GASKELL, *Mary Barton*

But not everyone in urban areas lived miserably. Well-to-do merchants and factory owners often built luxurious homes in the suburbs.

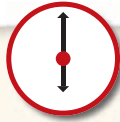
MAIN IDEA

Analyzing Primary Sources

A How does Gaskell indicate her sympathy for the working class in this passage?



3 P.M. The children often became drowsy during the afternoon or evening hours. In order to keep them awake, adult overseers sometimes whipped the children.



6 P.M. There was no break allowed for an evening meal. Children again ate on the run.



9 P.M. William Cooper's day ended after an exhausting 16-hour shift at work.



11 P.M. Cooper's sister worked another two hours even though she had to be back at work at 5:00 the next morning.



Working Conditions To increase production, factory owners wanted to keep their machines running as many hours as possible. As a result, the average worker spent 14 hours a day at the job, 6 days a week. Work did not change with the seasons, as it did on the farm. Instead, work remained the same week after week, year after year.

Industry also posed new dangers for workers. Factories were seldom well lit or clean. Machines injured workers. A boiler might explode or a drive belt might catch an arm. And there was no government program to provide aid in case of injury. The most dangerous conditions of all were found in coal mines. Frequent accidents, damp conditions, and the constant breathing of coal dust made the average miner's life span ten years shorter than that of other workers. Many women and children were employed in the mining industry because they were the cheapest source of labor.

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INTERACTIVE HISTORY

Explore the working conditions at a textile factory from around 1835.

Class Tensions Grow

Though poverty gripped Britain's working classes, the Industrial Revolution created enormous amounts of wealth in the nation. Most of this new money belonged to factory owners, shippers, and merchants. These people were part of a growing **middle class**, a social class made up of skilled workers, professionals, businesspeople, and wealthy farmers.

The Middle Class The new middle class transformed the social structure of Great Britain. In the past, landowners and aristocrats had occupied the top position in British society. With most of the wealth, they wielded the social and political power. Now some factory owners, merchants, and bankers grew wealthier than the landowners and aristocrats. Yet important social distinctions divided the two wealthy classes. Landowners looked down on those who had made their fortunes in the "vulgar" business world. Not until late in the 1800s were rich entrepreneurs considered the social equals of the lords of the countryside.

Gradually, a larger middle class—neither rich nor poor—emerged. The upper middle class consisted of government employees, doctors, lawyers, and managers of factories, mines, and shops. The lower middle class included factory overseers and such skilled workers as toolmakers, mechanical drafters, and printers. These people enjoyed a comfortable standard of living. **B**

The Working Class During the years 1800 to 1850, however, laborers, or the working class, saw little improvement in their living and working conditions. They watched their livelihoods disappear as machines replaced them. In frustration, some smashed the machines they thought were putting them out of work.

MAIN IDEA

Summarizing

B Describe the social classes in Britain.

One group of such workers was called the Luddites. They were named after Ned Ludd. Ludd, probably a mythical English laborer, was said to have destroyed weaving machinery around 1779. The Luddites attacked whole factories in northern England beginning in 1811, destroying laborsaving machinery. Outside the factories, mobs of workers rioted, mainly because of poor living and working conditions.

Positive Effects of the Industrial Revolution

Despite the problems that followed industrialization, the Industrial Revolution had a number of positive effects. It created jobs for workers. It contributed to the wealth of the nation. It fostered technological progress and invention. It greatly increased the production of goods and raised the standard of living. Perhaps most important, it provided the hope of improvement in people's lives.

The Industrial Revolution produced a number of other benefits as well. These included healthier diets, better housing, and cheaper, mass-produced clothing. Because the Industrial Revolution created a demand for engineers as well as clerical and professional workers, it expanded educational opportunities.

The middle and upper classes prospered immediately from the Industrial Revolution. For the workers it took longer, but their lives gradually improved during the 1800s. Laborers eventually won higher wages, shorter hours, and better working conditions after they joined together to form labor unions.

Long-Term Effects The long-term effects of the Industrial Revolution are still evident. Most people today in industrialized countries can afford consumer goods that would have been considered luxuries 50 or 60 years ago. In addition, their living and working conditions are much improved over those of workers in the 19th century. Also, profits derived from industrialization produced tax revenues. These funds have allowed local, state, and federal governments to invest in urban improvements and raise the standard of living of most city dwellers.

The economic successes of the Industrial Revolution, and also the problems created by it, were clearly evident in one of Britain's new industrial cities in the 1800s—Manchester.

CASE STUDY: Manchester

The Mills of Manchester

Manchester's unique advantages made it a leading example of the new industrial city. This northern English town had ready access to waterpower. It also had available labor from the nearby countryside and an outlet to the sea at Liverpool.

"From this filthy sewer pure gold flows," wrote Alexis de Tocqueville (ah•lehk•SEE duh-TOHK•vihl), the French writer, after he visited Manchester in 1835. Indeed, the industrial giant showed the best and worst of the Industrial Revolution. Manchester's rapid, unplanned growth made it an unhealthy place for the poor people who lived and worked there. But wealth flowed from its factories. It went first to the mill owners and the new middle class. Eventually, although not immediately, the working class saw their standard of living rise as well.

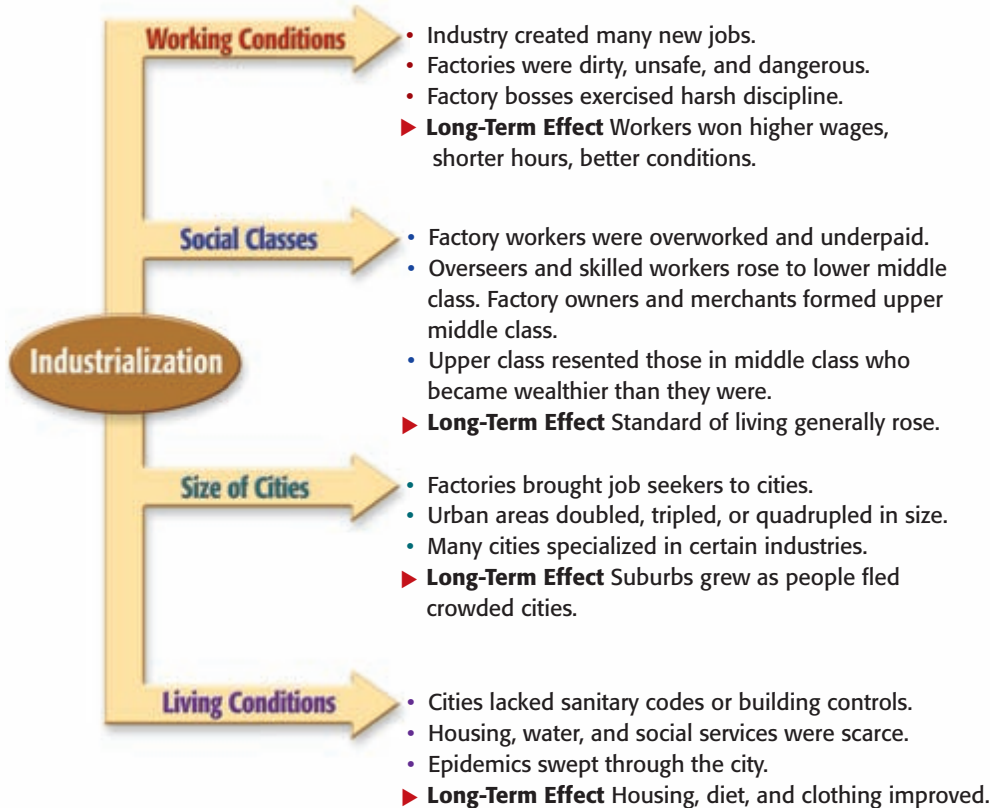
Manchester's business owners took pride in mastering each detail of the manufacturing process. They worked many hours and risked their own money. For their efforts, they were rewarded with high profits. Many erected gracious homes on the outskirts of town.

To provide the mill owners with high profits, workers labored under terrible conditions. Children as young as six joined their parents in the factories. There, for six days a week, they toiled from 6 A.M. to 7 or 8 P.M., with only half an hour for

Industrialization


Industrialization is the process of developing industries that use machines to produce goods. This process not only revolutionizes a country's economy, it also transforms social conditions and class structures.

Effects of Industrialization



▼ This engraving shows urban growth and industrial pollution in Manchester.

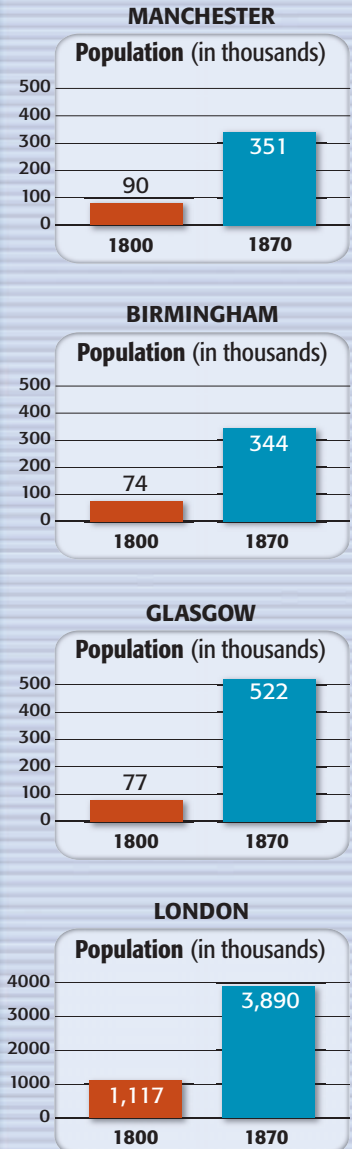


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RESEARCH WEB LINKS Go online for more on industrialization.

> DATA FILE

GROWTH OF CITIES



Source: *European Historical Statistics, 1750–1975*

Connect to Today

1. Recognizing Effects What were some advantages and disadvantages of industrialization?

 See Skillbuilder Handbook, page R6.

2. Making Inferences Many nations around the world today are trying to industrialize. What do you think they hope to gain from that process?

Connect to Today



Child Labor Today

To save on labor costs, many corporations have moved their operations to developing countries, where young children work long hours under wretched conditions. In 2007, their number was estimated at 218 million children aged 5–17. They are unprotected by labor laws. For mere pennies per hour, children weave carpets, sort vegetables, or assemble expensive athletic shoes.

Several organizations are working to end child labor, including the Child Welfare League of America and the International Labor Rights Fund.

lunch and an hour for dinner. To keep the children awake, mill supervisors beat them. Tiny hands repaired broken threads in Manchester's spinning machines, replaced thread in the bobbins, or swept up cotton fluff. The dangerous machinery injured many children. The fluff filled their lungs and made them cough.

Until the first Factory Act passed in 1819, the British government exerted little control over child labor in Manchester and other factory cities. The act restricted working age and hours. For years after the act passed, young children still did heavy, dangerous work in Manchester's factories. **C**

Putting so much industry into one place polluted the natural environment. The coal that powered factories and warmed houses blackened the air. Textile dyes and other wastes poisoned Manchester's Irwell River. An eyewitness observer wrote the following description of the river in 1862:

PRIMARY SOURCE

Steam boilers discharge into it their seething contents, and drains and sewers their fetid impurities; till at length it rolls on—here between tall dingy walls, there under precipices of red sandstone—considerably less a river than a flood of liquid manure.

HUGH MILLER, "Old Red Sandstone"

Like other new industrial cities of the 19th century, Manchester produced consumer goods and created wealth on a grand scale. Yet, it also stood as a reminder of the ills of rapid and unplanned industrialization.

As you will learn in Section 3, the industrialization that began in Great Britain spread to the United States and to continental Europe in the 1800s.

MAIN IDEA

Drawing Conclusions

C Whose interests did child labor serve?

SECTION 2 ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- urbanization
- middle class

USING YOUR NOTES

2. Which change brought about by industrialization had the greatest impact?

1. *Industrialization Changes Life*
 - A.
 - B.
2. *Class Tensions Grow*

MAIN IDEAS

3. Why did people flock to British cities and towns during the Industrial Revolution?
4. What social class expanded as a result of industrialization?
5. What were some of the negative effects of the rapid growth of Manchester?

CRITICAL THINKING & WRITING

6. **SUMMARIZING** How did industrialization contribute to city growth?
7. **EVALUATING** How were class tensions affected by the Industrial Revolution?
8. **FORMING AND SUPPORTING OPINIONS** The Industrial Revolution has been described as a mixed blessing. Do you agree or disagree? Support your answer with text references.
9. **WRITING ACTIVITY** **ECONOMICS** As a factory owner during the Industrial Revolution, write a **letter** to a newspaper justifying working conditions in your factory.

CONNECT TO TODAY CREATING A COMPARISON CHART

Make a **comparison chart** listing information on child labor in three developing nations—one each from Asia, Africa, and Latin America—and compare with data from the United States.

Industrialization Spreads

MAIN IDEA

EMPIRE BUILDING The industrialization that began in Great Britain spread to other parts of the world.

WHY IT MATTERS NOW

The Industrial Revolution set the stage for the growth of modern cities and a global economy.

TERMS & NAMES

- stock
- corporation

SETTING THE STAGE Great Britain's favorable geography and its financial systems, political stability, and natural resources sparked industrialization. British merchants built the world's first factories. When these factories prospered, more laborsaving machines and factories were built. Eventually, the Industrial Revolution that had begun in Britain spread both to the United States and to continental Europe. Countries that had conditions similar to those in Britain were ripe for industrialization.

Industrial Development in the United States

The United States possessed the same resources that allowed Britain to mechanize its industries. America had fast-flowing rivers, rich deposits of coal and iron ore, and a supply of laborers made up of farm workers and immigrants. During the War of 1812, Britain blockaded the United States, trying to keep it from engaging in international trade. This blockade forced the young country to use its own resources to develop independent industries. Those industries would manufacture the goods the United States could no longer import.

Industrialization in the United States As in Britain, industrialization in the United States began in the textile industry. Eager to keep the secrets of industrialization to itself, Britain had forbidden engineers, mechanics, and toolmakers to leave the country. In 1789, however, a young British mill worker named Samuel Slater emigrated to the United States. There, Slater built a spinning machine from memory and a partial design. The following year, Moses Brown opened the first factory in the United States to house Slater's machines in Pawtucket, Rhode Island. But the Pawtucket factory mass-produced only one part of finished cloth, the thread.

In 1813, Francis Cabot Lowell of Boston and four other investors revolutionized the American textile industry. They mechanized every stage in the manufacture of cloth. Their weaving factory in Waltham, Massachusetts, earned them enough money to fund a larger

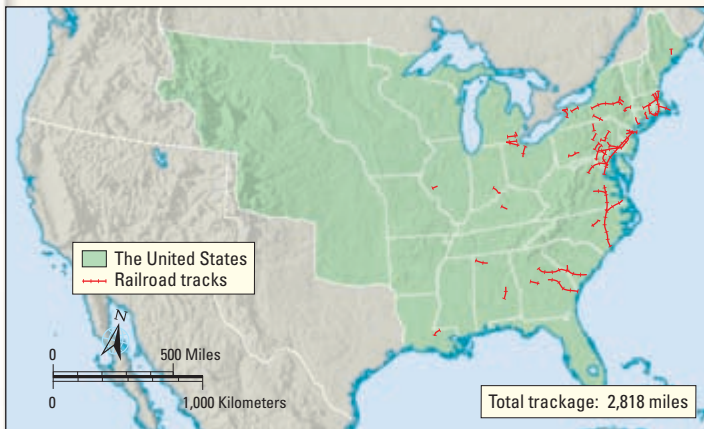
▼ Teenage mill girls at a Georgia cotton mill



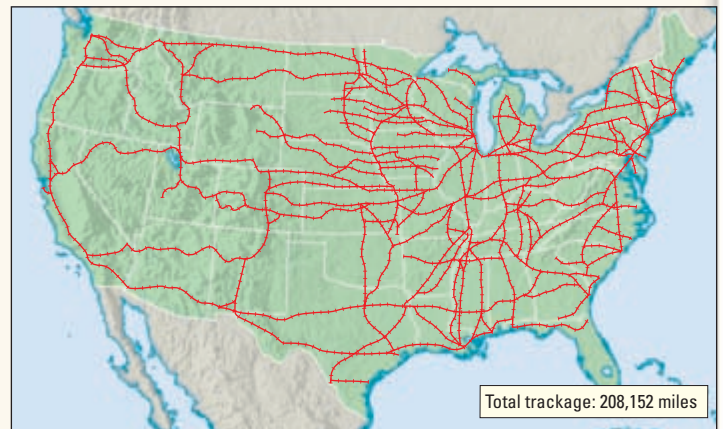
Use the graphic organizer online to take notes on industrialization in the United States and in Europe.

The Growth of Railroads in the United States

Railroad System, 1840



Railroad System, 1890



GEOGRAPHY SKILLBUILDER: Interpreting Maps

- 1. Region** In what part of the country were the first railroads built? By 1890, what other part of the country was densely covered by railroad tracks?
- 2. Movement** In what direction did the railroads help people move across the country?

operation in another Massachusetts town. When Lowell died, the remaining partners named the town after him. By the late 1820s, Lowell, Massachusetts, had become a booming manufacturing center and a model for other such towns.

Thousands of young single women flocked from their rural homes to work as mill girls in factory towns. There, they could make higher wages and have some independence. However, to ensure proper behavior, they were watched closely inside and outside the factory by their employers. The mill girls toiled more than 12 hours a day, 6 days a week, for decent wages. For some, the mill job was an alternative to being a servant and was often the only other job open to them:

PRIMARY SOURCE **A**

Country girls were naturally independent, and the feeling that at this new work the few hours they had of everyday leisure were entirely their own was a satisfaction to them. They preferred it to going out as "hired help." It was like a young man's pleasure in entering upon business for himself. Girls had never tried that experiment before, and they liked it.

LUCY LARCOM, *A New England Girlhood*

Textiles led the way, but clothing manufacture and shoemaking also underwent mechanization. Especially in the Northeast, skilled workers and farmers had formerly worked at home. Now they labored in factories in towns and cities such as Waltham, Lowell, and Lawrence, Massachusetts.

Later Expansion of U.S. Industry The Northeast experienced much industrial growth in the early 1800s. Nonetheless, the United States remained primarily agricultural until the Civil War ended in 1865. During the last third of the 1800s, the country experienced a technological boom. As in Britain, a number of causes contributed to this boom. These included a wealth of natural resources, among them oil, coal, and iron; a burst of inventions, such as the electric light bulb and the telephone; and a swelling urban population that consumed the new manufactured goods.

Also, as in Britain, railroads played a major role in America's industrialization. Cities like Chicago and Minneapolis expanded rapidly during the late 1800s. This

MAIN IDEA

Analyzing Primary Sources

A Why did Lucy Larcom think mill work benefited young women?

was due to their location along the nation's expanding railroad lines. Chicago's stockyards and Minneapolis's grain industries prospered by selling products to the rest of the country. Indeed, the railroads themselves proved to be a profitable business. By the end of the 1800s, a limited number of large, powerful companies controlled more than two-thirds of the nation's railroad tracks. Businesses of all kinds began to merge as the railroads had. Smaller companies joined together to form a larger one.

The Rise of Corporations Building large businesses like railroads required a great deal of money. To raise the money, entrepreneurs sold shares of **stock**, or certain rights of ownership. Thus people who bought stock became part owners of these businesses, which were called corporations. A **corporation** is a business owned by stockholders who share in its profits but are not personally responsible for its debts. Corporations were able to raise the large amounts of capital needed to invest in industrial equipment.

In the late 1800s, large corporations such as Standard Oil (founded by John D. Rockefeller) and the Carnegie Steel Company (founded by Andrew Carnegie) sprang up. They sought to control every aspect of their own industries in order to make big profits. Big business—the giant corporations that controlled entire industries—also made big profits by reducing the cost of producing goods. In the United States as elsewhere, workers earned low wages for laboring long hours, while stockholders earned high profits and corporate leaders made fortunes.

Continental Europe Industrializes

European businesses yearned to adopt the “British miracle,” the result of Britain's profitable new methods of manufacturing goods. But the troubles sparked by the French Revolution and the Napoleonic wars between 1789 and 1815 had halted trade, interrupted communication, and caused inflation in some parts of the continent. European countries watched the gap widen between themselves and Britain. Even so, industrialization eventually reached continental Europe.

▼ Danish workers labor in a steel mill in this 1885 painting by Peter Severin Kroyer.



Global Impact



Industrialization in Japan

With the beginning of the Meiji era in Japan in 1868, the central government began an ambitious program to transform the country into an industrialized state. It financed textile mills, coal mines, shipyards, and cement and other factories. It also asked private companies to invest in industry.

Some companies had been in business since the 1600s. But new companies sprang up too. Among them was the Mitsubishi company, founded in 1870 and still in business.

The industrializing of Japan produced sustained economic growth for the country. But it also led to strengthening the military and to Japanese imperialism in Asia.

Beginnings in Belgium Belgium led Europe in adopting Britain's new technology. It had rich deposits of iron ore and coal as well as fine waterways for transportation. As in the United States, British skilled workers played a key role in industrializing Belgium.

Samuel Slater had smuggled the design of a spinning machine to the United States. Much like him, a Lancashire carpenter named William Cockerill illegally made his way to Belgium in 1799. He carried secret plans for building spinning machinery. His son John eventually built an enormous industrial enterprise in eastern Belgium. It produced a variety of mechanical equipment, including steam engines and railway locomotives. Carrying the latest British advances, more British workers came to work with Cockerill. Several then founded their own companies in Europe.

Germany Industrializes Germany was politically divided in the early 1800s. Economic isolation and scattered resources hampered countrywide industrialization. Instead, pockets of industrialization appeared, as in the coal-rich Ruhr Valley of west central Germany. Beginning around 1835, Germany began to copy the British model. Germany imported British equipment and engineers. German manufacturers also sent their children to England to learn industrial management. **B**

Most important, Germany built railroads that linked its growing manufacturing cities, such as Frankfurt, with the Ruhr Valley's coal and iron ore deposits. In 1858, a German economist wrote, "Railroads and machine shops, coal mines

and iron foundries, spinneries and rolling mills seem to spring up out of the ground, and smokestacks sprout from the earth like mushrooms." Germany's economic strength spurred its ability to develop as a military power. By the late 1800s, a unified, imperial Germany had become both an industrial and a military giant.

Expansion Elsewhere in Europe In the rest of Europe, as in Germany, industrialization during the early 1800s proceeded by region rather than by country. Even in countries where agriculture dominated, pockets of industrialization arose. For example, Bohemia developed a spinning industry. Spain's Catalonia processed more cotton than Belgium. Northern Italy mechanized its textile production, specializing in silk spinning. Serf labor ran factories in regions around Moscow and St. Petersburg.

In France, sustained industrial growth occurred after 1830. French industrialization was more measured and controlled than in other countries because the agricultural economy remained strong. As a result, France avoided the great social and economic problems caused by industrialization. A thriving national market for new French products was created after 1850, when the government began railroad construction.

For a variety of reasons, many European countries did not industrialize. In some nations, the social structure delayed the adoption of new methods of production. The accidents of geography held back others. In Austria-Hungary and Spain, transportation posed great obstacles. Austria-Hungary's mountains defeated railroad builders. Spain lacked both good roads and waterways for canals.

MAIN IDEA

Analyzing Causes

B What factors slowed industrialization in Germany?

The Impact of Industrialization

The Industrial Revolution shifted the world balance of power. It increased competition between industrialized nations and poverty in less-developed nations.

Rise of Global Inequality Industrialization widened the wealth gap between industrialized and nonindustrialized countries, even while it strengthened their economic ties. To keep factories running and workers fed, industrialized countries required a steady supply of raw materials from less-developed lands. In turn, industrialized countries viewed poor countries as markets for their manufactured products.

Britain led in exploiting its overseas colonies for resources and markets. Soon other European countries, the United States, Russia, and Japan followed Britain's lead, seizing colonies for their economic resources. Imperialism, the policy of extending one country's rule over many other lands, gave even more power and wealth to these already wealthy nations. Imperialism was born out of the cycle of industrialization, the need for resources to supply the factories of Europe, and the development of new markets around the world. (See Chapter 27.)

Transformation of Society Between 1700 and 1900, revolutions in agriculture, production, transportation, and communication changed the lives of people in Western Europe and the United States. Industrialization gave Europe tremendous economic power. In contrast, the economies of Asia and Africa were still based on agriculture and small workshops. Industrialization revolutionized every aspect of society, from daily life to life expectancy. Despite the hardships early urban workers suffered, population, health, and wealth eventually rose dramatically in all industrialized countries. The development of a middle class created great opportunities for education and democratic participation. Greater democratic participation, in turn, fueled a powerful movement for social reform.



▲ The Crystal Palace Exposition in London in 1851 (shown above) celebrated the “works of industry of all nations.”

MAIN IDEA

Clarifying

Why did imperialism grow out of industrialization?

SECTION

3

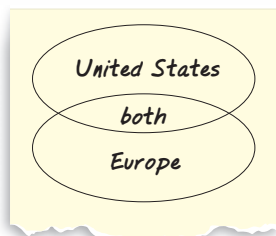
ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- stock
- corporation

USING YOUR NOTES

2. Which development had the most impact in the United States? in continental Europe?



MAIN IDEAS

3. What early industries mechanized in the United States?
4. Why did Belgium lead Europe in adopting industrialization?
5. How did the Industrial Revolution shift the world balance of power?

CRITICAL THINKING & WRITING

6. **RECOGNIZING BIAS** Go back to the quote from Lucy Larcom on page 730. Do you think her feelings about working in the mill are typical? Why or why not?
7. **MAKING INFERENCES** Why was Britain unable to keep industrial secrets away from other nations?
8. **FORMING AND SUPPORTING OPINIONS** What was the most significant effect of the Industrial Revolution?
9. **WRITING ACTIVITY** **EMPIRE BUILDING** Draw a **political cartoon** that could have been used by the British government to show their sense of their own superiority over nonindustrialized nations that they planned to colonize.

MULTIMEDIA ACTIVITY CREATING A DATABASE



Use the Internet to research the economy of a less-developed nation in either Asia, Africa, or South America. Create a **database** of economic statistics for that country.

INTERNET KEYWORD
country profiles

Reforming the Industrial World

MAIN IDEA

ECONOMICS The Industrial Revolution led to economic, social, and political reforms.

WHY IT MATTERS NOW

Many modern social welfare programs developed during this period of reform.

TERMS & NAMES

- laissez faire
- Adam Smith
- capitalism
- utilitarianism
- socialism
- Karl Marx
- communism
- union
- strike

SETTING THE STAGE In industrialized countries in the 19th century, the Industrial Revolution opened a wide gap between the rich and the poor. Business leaders believed that governments should stay out of business and economic affairs. Reformers, however, felt that governments needed to play an active role to improve conditions for the poor. Workers also demanded more rights and protection. They formed labor unions to increase their influence.

The Philosophers of Industrialization

The term **laissez faire** (LEHS•ay•FAIR) refers to the economic policy of letting owners of industry and business set working conditions without interference. This policy favors a free market unregulated by the government. The term is French for “let do,” and by extension, “let people do as they please.”

Laissez-faire Economics Laissez-faire economics stemmed from French economic philosophers of the Enlightenment. They criticized the idea that nations grow wealthy by placing heavy tariffs on foreign goods. In fact, they argued, government regulations only interfered with the production of wealth. These philosophers believed that if government allowed free trade—the flow of commerce in the world market without government regulation—the economy would prosper.

Adam Smith, a professor at the University of Glasgow, Scotland, defended the idea of a free economy, or free markets, in his 1776 book *The Wealth of Nations*. According to Smith, economic liberty guaranteed economic progress. As a result, government should not interfere. Smith’s arguments rested on what he called the three natural laws of economics:

- the law of self-interest—People work for their own good.
- the law of competition—Competition forces people to make a better product.
- the law of supply and demand—Enough goods would be produced at the lowest possible price to meet demand in a market economy.

The Economists of Capitalism Smith’s basic ideas were supported by British economists Thomas Malthus and David Ricardo. Like Smith, they believed that natural laws governed economic life. Their important ideas were the foundation of laissez-faire capitalism. **Capitalism** is an economic system in which the factors of production are privately owned and money is invested in business ventures to make a profit. These ideas also helped bring about the Industrial Revolution.



Use the graphic organizer online to take notes on the characteristics of capitalism and socialism.

In *An Essay on the Principle of Population*, written in 1798, Thomas Malthus argued that population tended to increase more rapidly than the food supply. Without wars and epidemics to kill off the extra people, most were destined to be poor and miserable. The predictions of Malthus seemed to be coming true in the 1840s.

David Ricardo, a wealthy stockbroker, took Malthus's theory one step further in his book, *Principles of Political Economy and Taxation* (1817). Like Malthus, Ricardo believed that a permanent underclass would always be poor. In a market system, if there are many workers and abundant resources, then labor and resources are cheap. If there are few workers and scarce resources, then they are expensive. Ricardo believed that wages would be forced down as population increased.

Laissez-faire thinkers such as Smith, Malthus, and Ricardo opposed government efforts to help poor workers. They thought that creating minimum wage laws and better working conditions would upset the free market system, lower profits, and undermine the production of wealth in society. **A**

The Rise of Socialism

In contrast to laissez-faire philosophy, which advised governments to leave business alone, other theorists believed that governments should intervene. These thinkers believed that wealthy people or the government must take action to improve people's lives. The French writer Alexis de Tocqueville gave a warning:

PRIMARY SOURCE

Consider what is happening among the working classes. . . . Do you not see spreading among them, little by little, opinions and ideas that aim not to overturn such and such a ministry, or such laws, or such a government, but society itself, to shake it to the foundations upon which it now rests?

ALEXIS DE TOCQUEVILLE, 1848 speech

Utilitarianism English philosopher Jeremy Bentham modified the ideas of Adam Smith. In the late 1700s, Bentham introduced the philosophy of **utilitarianism**. Bentham wrote his most influential works in the late 1700s. According to Bentham's theory, people should judge ideas, institutions, and actions on the basis of their utility, or usefulness. He argued that the government should try to promote the greatest good for the greatest number of people. A government policy was only useful if it promoted this goal. Bentham believed that in general the individual should be free to pursue his or her own advantage without interference from the state.

John Stuart Mill, a philosopher and economist, led the utilitarian movement in the 1800s. Mill came to question unregulated capitalism. He believed it was wrong that workers should lead deprived lives that sometimes bordered on starvation. Mill wished to help ordinary working people with policies that would lead to a more equal division of profits. He also favored a cooperative system of agriculture and women's rights, including the right to vote. Mill called for the government to do away with great differences in wealth. Utilitarians also pushed for reforms in the legal and prison systems and in education. **B**


History Makers



Adam Smith
1723–1790

In his book *The Wealth of Nations*, Smith argued that if individuals freely followed their own self-interest, the world would be an orderly and progressive place. Social harmony would result without any government direction, "as if by an invisible hand."

Smith applied an invisible hand of his own. After his death, people discovered that he had secretly donated large sums of his income to charities.

 hmhsocialstudies.com

RESEARCH WEB LINKS Go online for more on Adam Smith.

MAIN IDEA

Summarizing

A What did Malthus and Ricardo say about the effects of population growth?

MAIN IDEA

Clarifying

B How did Mill want to change the economic system?

Utopian Ideas Other reformers took an even more active approach. Shocked by the misery and poverty of the working class, a British factory owner named Robert Owen improved working conditions for his employees. Near his cotton mill in New Lanark, Scotland, Owen built houses, which he rented at low rates. He prohibited children under ten from working in the mills and provided free schooling.

Then, in 1824, he traveled to the United States. He founded a cooperative community called New Harmony in Indiana, in 1825. He intended this community to be a utopia, or perfect living place. New Harmony lasted only three years but inspired the founding of other communities.

Socialism French reformers such as Charles Fourier (FUR•ee•AY), Saint-Simon (san see•MOHN), and others sought to offset the ill effects of industrialization with a new economic system called socialism. In **socialism**, the factors of production are owned by the public and operate for the welfare of all.

Socialism grew out of an optimistic view of human nature, a belief in progress, and a concern for social justice. Socialists argued that the government should plan the economy rather than depend on free-market capitalism to do the job. They argued that government control of factories, mines, railroads, and other key industries would end poverty and promote equality. Public ownership, they believed, would help workers, who were at the mercy of their employers. Some socialists—such as Louis Blanc—advocated change through extension of the right to vote.

History Makers



Karl Marx
1818–1883

Karl Marx studied philosophy at the University of Berlin before he turned to journalism and economics. In 1849, Marx joined the flood of radicals who fled continental Europe for England. He had declared in *The Communist Manifesto* that “the working men have no country.”

Marx’s theories of socialism and the inevitable revolt of the working class made him little money. He earned a meager living as a journalist. His wealthy coauthor and fellow German, Friedrich Engels, gave Marx financial aid.

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RESEARCH WEB LINKS Go online for more on Karl Marx.

Marxism: Radical Socialism


The writings of a German journalist named **Karl Marx** introduced the world to a radical type of socialism called Marxism. Marx and Friedrich Engels, a German whose father owned a textile mill in Manchester, outlined their ideas in a 23-page pamphlet called *The Communist Manifesto*.

The Communist Manifesto In their manifesto, Marx and Engels argued that human societies have always been divided into warring classes. In their own time, these were the middle class “haves” or employers, called the bourgeoisie (BUR•zhwah•ZEE), and the “have-nots” or workers, called the proletariat (PROH•lih•TAIR•ee•iht). While the wealthy controlled the means of producing goods, the poor performed backbreaking labor under terrible conditions. This situation resulted in conflict:

PRIMARY SOURCE


Freeman and slave, patrician and plebeian, lord and serf, guild-master and journeyman, in a word, oppressor and oppressed, stood in constant opposition to one another, carried on an uninterrupted, now hidden, now open fight, a fight that each time ended, either in a revolutionary reconstitution of society at large, or in the common ruin of the contending classes.

KARL MARX and **FRIEDRICH ENGELS**, *The Communist Manifesto* (1848)

According to Marx and Engels, the Industrial Revolution had enriched the wealthy and impoverished the poor. The two writers predicted that the workers would overthrow the owners: “The proletarians have nothing to lose but their chains. They have a world to win. Workingmen of all countries, unite.” 

MAIN IDEA

Summarizing

 What were the ideas of Marx and Engels concerning relations between the owners and the working class?

Capitalism vs. Socialism

The economic system called capitalism developed gradually over centuries, beginning in the late Middle Ages. Because of the ways industrialization changed society, some people began to think that capitalism led to certain problems, such as the abuse of workers. They responded by developing a new system of economic ideas called socialism.

Capitalism	Socialism
<ul style="list-style-type: none"> Individuals and businesses own property and the means of production. 	<ul style="list-style-type: none"> The community or the state should own property and the means of production.
<ul style="list-style-type: none"> Progress results when individuals follow their own self-interest. 	<ul style="list-style-type: none"> Progress results when a community of producers cooperate for the good of all.
<ul style="list-style-type: none"> Businesses follow their own self-interest by competing for the consumer's money. Each business tries to produce goods or services that are better and less expensive than those of competitors. 	<ul style="list-style-type: none"> Socialists believe that capitalist employers take advantage of workers. The community or state must act to protect workers.
<ul style="list-style-type: none"> Consumers compete to buy the best goods at the lowest prices. This competition shapes the market by affecting what businesses are able to sell. 	<ul style="list-style-type: none"> Capitalism creates unequal distribution of wealth and material goods. A better system is to distribute goods according to each person's need.
<ul style="list-style-type: none"> Government should not interfere in the economy because competition creates efficiency in business. 	<ul style="list-style-type: none"> An unequal distribution of wealth and material goods is unfair. A better system is to distribute goods according to each person's need.

SKILLBUILDER: Interpreting Charts

- 1. Developing Historical Perspective** Consider the following people from 19th-century Britain: factory worker, shop owner, factory owner, unemployed artisan. Which of them would be most likely to prefer capitalism and which would prefer socialism? Why?
- 2. Forming and Supporting Opinions** Which system of economic ideas seems most widespread today? Support your opinion.

The Future According to Marx Marx believed that the capitalist system, which produced the Industrial Revolution, would eventually destroy itself in the following way. Factories would drive small artisans out of business, leaving a small number of manufacturers to control all the wealth. The large proletariat would revolt, seize the factories and mills from the capitalists, and produce what society needed. Workers, sharing in the profits, would bring about economic equality for all people. The workers would control the government in a “dictatorship of the proletariat.” After a period of cooperative living and education, the state or government would wither away as a classless society developed.

Marx called this final phase pure communism. Marx described **communism** as a form of complete socialism in which the means of production—all land, mines, factories, railroads, and businesses—would be owned by the people. Private property would in effect cease to exist. All goods and services would be shared equally.

Published in 1848, *The Communist Manifesto* produced few short-term results. Though widespread revolts shook Europe during 1848 and 1849, Europe's leaders eventually put down the uprisings. Only after the turn of the century did the fiery Marxist pamphlet produce explosive results. In the 1900s, Marxism inspired revolutionaries such as Russia's Lenin, China's Mao Zedong, and Cuba's Fidel Castro. These leaders adapted Marx's beliefs to their own specific situations and needs.

Connect to Today



Communism Today

Communism expanded to all parts of the world during the Cold War that followed the end of World War II. (See map on page 963.) At the peak of Communist expansion in the 1980s, about 20 nations were Communist-controlled, including two of the world's largest—China and the Soviet Union. However, dissatisfaction with the theories of Karl Marx had been developing.

Eventually, most Communist governments were replaced. Today, there are only five Communist countries—China, North Korea, Vietnam, and Laos in Asia and Cuba in the Caribbean. (See map above.)

In *The Communist Manifesto*, Marx and Engels stated their belief that economic forces alone dominated society. Time has shown, however, that religion, nationalism, ethnic loyalties, and a desire for democratic reforms may be as strong influences on history as economic forces. In addition, the gap between the rich and the poor within the industrialized countries failed to widen in the way that Marx and Engels predicted, mostly because of the various reforms enacted by governments.

Labor Unions and Reform Laws

Factory workers faced long hours, dirty and dangerous working conditions, and the threat of being laid off. By the 1800s, working people became more active in politics. To press for reforms, workers joined together in voluntary labor associations called **unions**.

Unionization A union spoke for all the workers in a particular trade. Unions engaged in collective bargaining, negotiations between workers and their employers. They bargained for better working conditions and higher pay. If factory owners refused these demands, union members could **strike**, or refuse to work.

Skilled workers led the way in forming unions because their special skills gave them extra bargaining power. Management would have trouble replacing such skilled workers as carpenters, printers, and spinners. Thus, the earliest unions helped the lower middle class more than they helped the poorest workers.

The union movement underwent slow, painful growth in both Great Britain and the United States. For years, the British government denied workers the right to form unions. The government saw unions as a threat to social order and stability. Indeed, the Combination Acts of 1799 and 1800 outlawed unions and strikes. Ignoring the threat of jail or job loss, factory workers joined unions anyway. Parliament finally repealed the Combination Acts in 1824. After 1825, the British government unhappily tolerated unions.

British unions had shared goals of raising wages for their members and improving working conditions. By 1875, British trade unions had won the right to strike and picket peacefully. They had also built up a membership of about 1 million people.

In the United States, skilled workers had belonged to unions since the early 1800s. In 1886, several unions joined together to form the organization that would become the American Federation of Labor (AFL). A series of successful strikes won AFL members higher wages and shorter hours.

Reform Laws Eventually, reformers and unions forced political leaders to look into the abuses caused by industrialization. In both Great Britain and the United States, new laws reformed some of the worst abuses of industrialization. In the 1820s and 1830s, for example, Parliament began investigating child labor and working conditions in factories and mines. As a result of its findings, Parliament passed the Factory Act of 1833. The new law made it illegal to hire children under 9 years old. Children from the ages of 9 to 12 could not work more than 8 hours a day. Young people from 13 to 17 could not work more than 12 hours. In 1842, the Mines Act prevented women and children from working underground.

MAIN IDEA**D Summarizing**

What were some of the important reform bills passed in Britain during this period?

In 1847, the Parliament passed a bill that helped working women as well as their children. The Ten Hours Act of 1847 limited the workday to ten hours for women and children who worked in factories. **D**

Reformers in the United States also passed laws to protect child workers. In 1904, a group of progressive reformers organized the National Child Labor Committee to end child labor. Arguing that child labor lowered wages for all workers, union members joined the reformers. Together they pressured national and state politicians to ban child labor and set maximum working hours.

In 1919, the U.S. Supreme Court objected to a federal child labor law, ruling that it interfered with states' rights to regulate labor. However, individual states were allowed to limit the working hours of women and, later, of men.

The Reform Movement Spreads

Almost from the beginning, reform movements rose in response to the negative impact of industrialization. These reforms included improving the workplace and extending the right to vote to working-class men. The same impulse toward reform, along with the ideals of the French Revolution, also helped to end slavery and promote new rights for women and children.

The Abolition of Slavery William Wilberforce, a highly religious man, was a member of Parliament who led the fight for abolition—the end of the slave trade and slavery in the British Empire. Parliament passed a bill to end the slave trade in the British West Indies in 1807. After he retired from Parliament in 1825, Wilberforce continued his fight to free the slaves. Britain finally abolished slavery in its empire in 1833.

British antislavery activists had mixed motives. Some, such as the abolitionist Wilberforce, were morally against slavery. Others viewed slave labor as an economic threat. Furthermore, a new class of industrialists developed who supported cheap labor rather than slave labor. They soon gained power in Parliament.

In the United States the movement to fulfill the promise of the Declaration of Independence by ending slavery grew in the early 1800s. The enslavement of African people finally ended in the United States when the Union won the Civil War in 1865. Then, enslavement persisted in the Americas only in Puerto Rico, Cuba, and Brazil. In Puerto Rico, slavery was ended in 1873. Spain finally abolished slavery in its Cuban colony in 1886. Not until 1888 did Brazil's huge enslaved population win freedom.

The Fight for Women's Rights The Industrial Revolution proved a mixed blessing for women. On the one hand, factory work offered higher wages than work done at home. Women spinners in Manchester, for example, earned much more money than women who stayed home to spin cotton thread. On the other hand, women factory workers usually made only one-third as much money as men did.

Women led reform movements to address this and other pressing social issues. During the mid-1800s, for example, women formed unions in the trades where they dominated. In Britain, some women served as safety inspectors in factories where other women worked. In the United States, college-educated women like Jane Addams ran settlement houses. These community centers served the poor residents of slum neighborhoods.



▲ Hungarian workers meet to plan their strategy before a strike.

History Makers



Jane Addams
1860–1935

After graduating from college, Jane Addams wondered what to do with her life.

I gradually became convinced that it would be a good thing to rent a house in a part of the city where many primitive and actual needs are found, in which young women who had been given over too exclusively to study, might . . . learn of life from life itself.

Addams and her friend Ellen Starr set up Hull House in a working-class district in Chicago. Eventually the facilities included a nursery, a gym, a kitchen, and a boarding house for working women. Hull House not only served the immigrant population of the neighborhood, it also trained social workers.

In both the United States and Britain, women who had rallied for the abolition of slavery began to wonder why their own rights should be denied on the basis of gender. The movement for women's rights began in the United States as early as 1848. Women activists around the world joined to found the International Council for Women in 1888. Delegates and observers from 27 countries attended the council's 1899 meeting. **E**

Reforms Spread to Many Areas of Life In the United States and Western Europe, reformers tried to correct the problems troubling the newly industrialized nations. Public education and prison reform ranked high on the reformers' lists.

One of the most prominent U.S. reformers, Horace Mann of Massachusetts, favored free public education for all children. Mann, who spent his own childhood working at hard labor, warned, "If we do not prepare children to become good citizens . . . if we do not enrich their minds with knowledge, then our republic must go down to destruction." By the 1850s, many states were starting public school systems. In Western Europe, free public schooling became available in the late 1800s.

In 1831, French writer Alexis de Tocqueville had contrasted the brutal conditions in American prisons to the "extended liberty" of American society. Those who sought to reform prisons emphasized the goal of providing prisoners with the means to lead to useful lives upon release.

During the 1800s, democracy grew in industrialized countries even as foreign expansion increased. The industrialized democracies faced new challenges both at home and abroad. You will learn about these challenges in Chapter 26.

MAIN IDEA

E Making Inferences

Why might women abolitionists have headed the movement for women's rights?

SECTION 4 ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- laissez faire
- Adam Smith
- capitalism
- utilitarianism
- socialism
- Karl Marx
- communism
- union
- strike

USING YOUR NOTES

2. What characteristics do capitalism and socialism share?

Capitalism	Socialism
1.	1.
2.	2.
3.	3.

MAIN IDEAS

3. What were Adam Smith's three natural laws of economics?
4. What kind of society did early socialists want?
5. Why did workers join together in unions?

CRITICAL THINKING & WRITING

6. **IDENTIFYING PROBLEMS** What were the main problems faced by the unions during the 1800s and how did they overcome them?
7. **DRAWING CONCLUSIONS** Why do you think that Marx's "dictatorship of the proletariat" did not happen?
8. **MAKING INFERENCES** Why did the labor reform movement spread to other areas of life?
9. **WRITING ACTIVITY** **ECONOMICS** Write a two-paragraph **persuasive essay** on how important economic forces are in society. Support your opinion using evidence from this and previous chapters.

CONNECT TO TODAY PREPARING AN ECONOMIC REPORT

Research a present-day corporation. Prepare an **economic report** that includes the corporation's structure, products or services, number of employees, and any other relevant economic information you are able to find.

VIDEO

Andrew Carnegie:
Prince of Steel

Industrialization

Industrialization eventually raised the standard of living for many people in Europe and North America in the 1800s. Yet the process also brought suffering to countless workers who crowded into filthy cities to toil for starvation wages. The following excerpts reveal a variety of perspectives on this major historical event.

A PRIMARY SOURCE

Mary Paul

Mary Paul worked in a textile factory in Lowell, Massachusetts. In an 1846 letter to her father in New Hampshire, the 16-year-old expressed her satisfaction with her situation at Lowell.

I am at work in a spinning room tending four sides of warp which is one girl's work. The overseer tells me that he never had a girl get along better than I do. . . . I have a very good boarding place, have enough to eat. . . . The girls are all kind and obliging. . . . I think that the factory is the best place for me and if any girl wants employment, I advise them to come to Lowell.

B PRIMARY SOURCE

Andrew Carnegie

In his autobiography, published in 1920, the multimillionaire industrialist views with optimism the growth of American industry.

One great advantage which America will have in competing in the markets of the world is that her manufacturers will have the best home market. Upon this they can depend for a return upon capital, and the surplus product can be exported with advantage, even when the prices received for it do no more than cover actual cost, provided the exports be charged with their proportion of all expenses. The nation that has the best home market, especially if products are standardized, as ours are, can soon outsell the foreign producer.

C PRIMARY SOURCE

Friedrich Engels

Friedrich Engels, who coauthored *The Communist Manifesto* and also managed a textile factory in Manchester, England, spent his nights wandering the city's slums.

Nobody troubles about the poor as they struggle helplessly in the whirlpool of modern industrial life. The working man may be lucky enough to find employment, if by his labor he can enrich some member of the middle classes. But his wages are so low that they hardly keep body and soul together. If he cannot find work, he can steal, unless he is afraid of the police; or he can go hungry and then the police will see to it that he will die of hunger in such a way as not to disturb the equanimity of the middle classes.

D PRIMARY SOURCE

Walter Crane

This political cartoon was published in *Cartoons for the Cause* in Britain in 1886. It shows the vampire bat of Capitalism attacking a laborer. Socialism is pictured as an angel who is coming to the rescue.



Document-Based QUESTIONS

1. Why would Andrew Carnegie (Source B) and Friedrich Engels (Source C) disagree about the effects of industrialization?
2. What might be reasons for 16-year-old Mary Paul's (Source A) satisfaction with her job and life in Lowell?
3. Why might the political cartoon by Walter Crane (Source D) be useful in getting workers to rally to the cause of socialism?

VISUAL SUMMARY

The Industrial Revolution



Economic Effects

- New inventions and development of factories
- Rapidly growing industry in the 1800s
- Increased production and higher demand for raw materials
- Growth of worldwide trade
- Population explosion and expanding labor force
- Exploitation of mineral resources
- Highly developed banking and investment system
- Advances in transportation, agriculture, and communication



Social Effects

- Increase in population of cities
- Lack of city planning
- Loss of family stability
- Expansion of middle class
- Harsh conditions for laborers, including children
- Workers' progress versus laissez-faire economic attitudes
- Improved standard of living
- Creation of new jobs
- Encouragement of technological progress



Political Effects

- Child labor laws to end abuses
- Reformers urging equal distribution of wealth
- Trade unions formed
- Social reform movements, such as utilitarianism, utopianism, socialism, and Marxism
- Reform bills in Parliament and Congress

TERMS & NAMES

For each term or name below, briefly explain its connection to the Industrial Revolution.

1. Industrial Revolution
2. enclosure
3. factory
4. urbanization
5. middle class
6. corporation
7. laissez faire
8. socialism
9. Karl Marx
10. union

MAIN IDEAS

The Beginnings of Industrialization Section 1 (pages 717–722)

11. What were the four natural resources needed for British industrialization?
12. How did the enclosure movement change agriculture in England?
13. What were two important inventions created during the Industrial Revolution? Describe their impact.

Case Study: Industrialization Section 2 (pages 723–728)

14. What were the living conditions like in Britain during industrialization?
15. How did the new middle class transform the social structure of Great Britain during industrialization?
16. How did industrialization affect Manchester's natural environment?

Industrialization Spreads Section 3 (pages 729–733)

17. Why were other European countries slower to industrialize than Britain?
18. What might explain the rise of global inequality during the Industrial Revolution?

Reforming the Industrial World Section 4 (pages 734–741)

19. What were the two warring classes that Marx and Engels outlined in *The Communist Manifesto*?
20. How did women fight for change during the Industrial Revolution?

CRITICAL THINKING

1. USING YOUR NOTES

In a chart, list some of the major technological advances and their effects on society.

Technological Advance	Effect(s)

2. EVALUATING

SCIENCE AND TECHNOLOGY How significant were the changes that the Industrial Revolution brought to the world? Explain your conclusion.

3. ANALYZING CAUSES AND RECOGNIZING EFFECTS

ECONOMICS How important were labor unions in increasing the power of workers? Give reasons for your opinion.

4. DRAWING CONCLUSIONS

How did the Industrial Revolution help to increase Germany's military power? Support your answer with information from the chapter.

5. DEVELOPING HISTORICAL PERSPECTIVE

EMPIRE BUILDING Would a nonindustrialized or an industrialized nation more likely be an empire builder? Why?

STANDARDS-BASED ASSESSMENT

Use the quotation about industrialization and your knowledge of world history to answer questions 1 and 2.

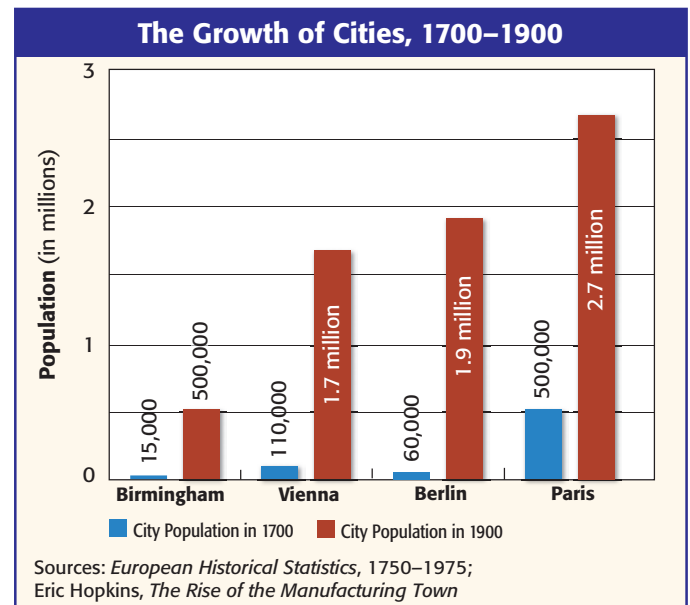
PRIMARY SOURCE

It was a town of red brick, or of brick that would have been red if the smoke and ashes had allowed it It was a town of machinery and tall chimneys, out of which interminable [endless] serpents of smoke trailed themselves for ever and ever It contained several large streets all very like one another, and many small streets still more like one another, inhabited by people equally like one another, who all went in and out at the same hours, with the same sound upon the same pavements, to do the same work, and to whom every day was the same as yesterday and tomorrow, and every year the counterpart of the last and the next.

CHARLES DICKENS, *Hard Times*

- In this passage, the writer is trying to describe how
 - people came from the countryside to the city to work in industry.
 - entrepreneurs built factories.
 - capitalism works.
 - difficult life is for workers in industrial cities.
- What is Dickens's view of industrialization?
 - that it is good for factory owners
 - that it brings progress to a nation
 - that it pollutes the air and exploits the workers
 - that it causes population growth

Use the graph below and your knowledge of world history to answer question 3.



- The graph above shows population growth in four European cities from 1700 to 1900, that is, before and after the Industrial Revolution. Which statement best describes the information in the chart?
 - All the cities grew at the same rate.
 - The increase in population for each city was less than 2 million people.
 - Paris was the most populous city both before and after the Industrial Revolution.
 - Berlin's population in 1900 was five times its size in 1700.

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Interact *with* History

On page 716, you looked at working conditions in an English factory in the 19th century. Now that you have read the chapter, rethink your decision about what you would do to change your situation. What working conditions would you change? What benefits and disadvantages might a union bring?

FOCUS ON WRITING

The Industrial Revolution's impact varied according to social class. Write a three-paragraph **expository essay** indicating how these people would view the changes in industry: an inventor, an entrepreneur, a skilled worker, and a hand weaver.

MULTIMEDIA ACTIVITY



Using Graphics Software

Make a list of five major inventions or innovations of the Industrial Revolution. Research each to learn about the scientific, economic, and social changes that contributed to its development and the effects that it caused. Use the Internet, books, and other resources to conduct your research. Then use graphics software to create a chart, graph, or diagram depicting the relationship between the inventions and innovations, the changes, and the effects.

You may include some of the following:

- the plow
- the cotton gin
- the power loom
- the telegraph
- the sewing machine

CHAPTER 26

An Age of Democracy and Progress, 1815–1914

Essential Question

What impact did democratic ideals have on Western society in the 19th century and how did technology and science change communication and daily life?



What You Will Learn

In this chapter you will learn about the spread of democratic ideals and industrial and scientific progress in the 19th century.

SECTION 1 Democratic Reform and Activism

Main Idea Spurred by the demands of the people, Great Britain and France underwent democratic reform.

SECTION 2 Self-Rule for British Colonies

Main Idea Britain allowed self-rule in Canada, Australia, and New Zealand but delayed it for Ireland.

SECTION 3 War and Expansion in the United States

Main Idea The United States expanded across North America and fought a civil war.

SECTION 4 Nineteenth-Century Progress

Main Idea Breakthroughs in science and technology transformed daily life and entertainment.

Previewing Themes

EMPIRE BUILDING During the 1800s, Great Britain gradually allowed three of its colonies—Canada, Australia, and New Zealand—greater self-rule. However, Britain maintained tight control over Ireland.

Geography According to the map, what Western democracies existed in North America and Western Europe in 1900?

POWER AND AUTHORITY The United States expanded across the continent during the 1800s and added new states to its territory to become a great power.

Geography What geographical factors might have helped to make the United States a great power?

SCIENCE AND TECHNOLOGY The transcontinental railroad helped to link the United States from the Atlantic Ocean to the Pacific Ocean. It was a triumph of 19th-century technology.

Geography How might a technological achievement such as the transcontinental railroad have contributed to American prosperity?

EUROPE

1815

WORLD

1821
Mexico wins independence from Spain.



1837
Queen Victoria comes to power in Great Britain.

1845
Ireland is struck by famine.

1859
Darwin publishes theory of evolution.

1850



1857
Sepoy Mutiny challenges British rule in India. (native troops in Britain's East India Company)



Western Democracies, 1900



Thomas A. Edison:
Father of Invention

hmsocialstudies.com VIDEO



1871
Franco-Prussian War ends.

1889
Eiffel Tower is completed in Paris. ▶



1880

1915

1867
Dominion of Canada is formed.

1869
Suez Canal opens.

1893
New Zealand becomes first nation to allow women to vote.



1914
Panama Canal opens. ◀

What ideals might be worth fighting and dying for?

You are living in Paris in 1871. France is in a state of political upheaval following the Franco-Prussian War. When workers in Paris set up their own government, called the Paris Commune, French soldiers quickly stamp out the movement. Most of the Communards (the supporters of the Commune) are either killed or imprisoned. When your good friend Philippe dies in the fighting, you wonder whether self-government is worth dying for.



▲ Communards lie massacred in this painting titled *A Street in Paris in May 1871*, by Maximilien Luce.

EXAMINING *the* ISSUES

- **What might lead you to join a group seeking self-government?**
- **What ideals would you choose to help shape a new government?**

As a class, discuss these questions. During the discussion, think about some of the ideals that inspired American and French revolutionaries. As you read this chapter, consider the ideals that moved people to action. Also consider how people tried to change government to better reflect their ideals.



Democratic Reform and Activism

MAIN IDEA

POWER AND AUTHORITY
Spurred by the demands of the people, Great Britain and France underwent democratic reforms.

WHY IT MATTERS NOW

During this period, Britain and France were transformed into the democracies they are today.

TERMS & NAMES

- suffrage
- Chartist movement
- Queen Victoria
- Third Republic
- Dreyfus affair
- anti-Semitism
- Zionism

SETTING THE STAGE Urbanization and industrialization brought sweeping changes to Western nations. People looking for solutions to the problems created by these developments began to demand reforms. They wanted to improve conditions for workers and the poor. Many people also began to call for political reforms. They demanded that more people be given a greater voice in government. Many different groups, including the middle class, workers, and women, argued that the right to vote be extended to groups that were excluded.

Britain Enacts Reforms

As Chapter 21 explained, Britain became a constitutional monarchy in the late 1600s. Under this system of government, the monarch serves as the head of state, but Parliament holds the real power. The British Parliament consists of a House of Lords and a House of Commons. Traditionally, members of the House of Lords either inherited their seats or were appointed. However, this changed in 1999, when legislation was passed that abolished the right of hereditary peers to inherit a seat in the House of Lords. Members of the House of Commons are elected by the British people.

In the early 1800s, the method of selecting the British government was not a true democracy. Only about five percent of the population had the right to elect the members of the House of Commons. Voting was limited to men who owned a substantial amount of land. Women could not vote at all. As a result, the upper classes ran the government.

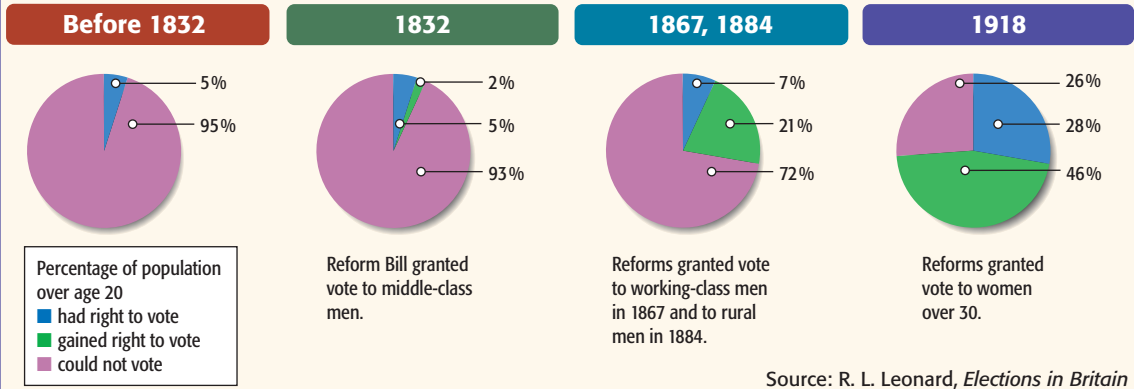
The Reform Bill of 1832 The first group to demand a greater voice in politics was the wealthy middle class—factory owners, bankers, and merchants. Beginning in 1830, protests took place around England in favor of a bill in Parliament that would extend **suffrage**, or the right to vote. The Revolution of 1830 in France frightened parliamentary leaders. They feared that revolutionary violence would spread to Britain. Thus, Parliament passed the Reform Bill of 1832. This law eased the property requirements so that well-to-do men in the middle class could vote. The Reform Bill also modernized the districts for electing members of Parliament and gave the thriving new industrial cities more representation.

Chartist Movement Although the Reform Bill increased the number of British voters, only a small percentage of men were eligible to vote. A popular movement



Use the graphic organizer online to take notes on the events that expanded or impeded democracy.

Expansion of Suffrage in Britain



SKILLBUILDER: Interpreting Graphs

- Clarifying** What percentage of the adults in Britain could vote in 1832?
- Comparing** By how much did the percentage of voters increase after the reforms of 1867 and 1884?

arose among the workers and other groups who still could not vote to press for more rights. It was called the **Chartist movement** because the group first presented its demands to Parliament in a petition called The People's Charter of 1838.

The People's Charter called for suffrage for all men and annual Parliamentary elections. It also proposed to reform Parliament in other ways. In Britain at the time, eligible men voted openly. Since their vote was not secret, they could feel pressure to vote in a certain way. Members of Parliament had to own land and received no salary, so they needed to be wealthy. The Chartists wanted to make Parliament responsive to the lower classes. To do this, they demanded a secret ballot, an end to property requirements for serving in Parliament, and pay for members of Parliament.

Parliament rejected the Chartists' demands. However, their protests convinced many people that the workers had valid complaints. Over the years, workers continued to press for political reform, and Parliament responded. It gave the vote to working-class men in 1867 and to male rural workers in 1884. After 1884, most adult males in Britain had the right to vote. By the early 1900s, all the demands of the Chartists, except for annual elections, became law. **A**

The Victorian Age The figure who presided over all this historic change was **Queen Victoria**. Victoria came to the throne in 1837 at the age of 18. She was queen for nearly 64 years. During the Victorian Age, the British Empire reached the height of its wealth and power. Victoria was popular with her subjects, and she performed her duties capably. However, she was forced to accept a less powerful role for the monarchy.

The kings who preceded Victoria in the 1700s and 1800s had exercised great influence over Parliament. The spread of democracy in the 1800s shifted political power almost completely to Parliament, and especially to the elected House of Commons. Now the government was completely run by the prime minister and the cabinet.

History Makers



Queen Victoria and Prince Albert

About two years after her coronation, Queen Victoria (1819–1901) fell in love with her cousin Albert (1819–1861), a German prince. She proposed to him and they were married in 1840. Together they had nine children. Prince Albert established a tone of politeness and correct behavior at court, and the royal couple presented a picture of loving family life that became a British ideal.

After Albert died in 1861, the queen wore black silk for the rest of her life in mourning. She once said of Albert, "Without him everything loses its interest."

MAIN IDEA

Making Inferences

A Why do you think the Chartists demanded a secret ballot rather than public voting?

Women Get the Vote

By 1890, several industrial countries had universal male suffrage (the right of all men to vote). No country, however, allowed women to vote. As more men gained suffrage, more women demanded the same.

Organization and Resistance During the 1800s, women in both Great Britain and the United States worked to gain the right to vote. British women organized reform societies and protested unfair laws and customs. As women became more vocal, however, resistance to their demands grew. Many people, both men and women, thought that woman suffrage was too radical a break with tradition. Some claimed that women lacked the ability to take part in politics.

Militant Protests After decades of peaceful efforts to win the right to vote, some women took more drastic steps. In Britain, Emmeline Pankhurst formed the Women's Social and Political Union (WSPU) in 1903. The WSPU became the most militant organization for women's rights. Its goal was to draw attention to the cause of woman suffrage. When asked about why her group chose militant means to gain women's rights, Pankhurst replied:

PRIMARY SOURCE

I want to say here and now that the only justification for violence, the only justification for damage to property, the only justification for risk to the comfort of other human beings is the fact that you have tried all other available means and have failed to secure justice.

EMMELINE PANKHURST, *Why We Are Militant*

MAIN IDEA

Analyzing Motives

B Was the use of militant action effective in achieving the goal of woman suffrage? Explain.

Emmeline Pankhurst, her daughters Christabel and Sylvia, and other WSPU members were arrested and imprisoned many times. When they were jailed, the Pankhursts led hunger strikes to keep their cause in the public eye. British officials force-fed Sylvia and other activists to keep them alive.

Though the woman suffrage movement gained attention between 1880 and 1914, its successes were gradual. Women did not gain the right to vote in national elections in Great Britain and the United States until after World War I. **B**

France and Democracy

While Great Britain moved toward greater democracy in the late 1800s, democracy finally took hold in France.

The Third Republic In the aftermath of the Franco-Prussian War, France went through a series of crises. Between 1871 and 1914, France averaged a change of government almost yearly. A dozen political parties competed for power. Not until 1875 could the National Assembly agree on a new government. Eventually, the members voted to set up a republic. The **Third Republic** lasted over 60 years. However, France remained divided.

The Dreyfus Affair During the 1880s and 1890s, the Third Republic was threatened by monarchists, aristocrats, clergy, and army leaders. These groups wanted a monarchy or military rule. A controversy known as the **Dreyfus affair** became a battleground for these opposing forces. Widespread feelings of **anti-Semitism**, or prejudice against Jews, also played a role in this scandal.

Global Impact

The Women's Movement

By the 1880s, women were working internationally to win more rights. In 1888, women activists from the United States, Canada, and Europe met in Washington, D.C., for the International Council of Women. In 1893, delegates and observers from many countries attended a large congress of women in Chicago. They came from lands as far apart as New Zealand, Argentina, Iceland, Persia, and China.

The first countries to grant suffrage to women were New Zealand (1893) and Australia (1902). Only in two European countries—Finland (1906, then part of the Russian Empire) and Norway (1913)—did women gain voting rights before World War I. In the United States, the territory of Wyoming allowed women to vote in 1869. Several other Western states followed suit.



▲ This engraving from an 1898 French magazine shows Émile Zola being surrounded by an anti-Semitic mob.

In 1894, Captain Alfred Dreyfus, one of the few Jewish officers in the French army, was accused of selling military secrets to Germany. A court found him guilty, based on false evidence, and sentenced him to life in prison. In a few years, new evidence showed that Dreyfus had been framed by other army officers.

Public opinion was sharply divided over the scandal. Many army leaders, nationalists, leaders in the clergy, and anti-Jewish groups refused to let the case be reopened. They feared sudden action would cast doubt on the honor of the army. Dreyfus's defenders insisted that

justice was more important. In 1898, the writer Émile Zola published an open letter titled *J'accuse!* (I accuse) in a popular French newspaper. In the letter, Zola denounced the army for covering up a scandal. Zola was sentenced to a year in prison for his views, but his letter gave strength to Dreyfus's cause. Eventually, the French government declared his innocence.

The Rise of Zionism The Dreyfus case showed the strength of anti-Semitism in France and other parts of Western Europe. However, persecution of Jews was even more severe in Eastern Europe. Russian officials permitted pogroms (puh•GRAHMS), organized campaigns of violence against Jews. From the late 1880s on, thousands of Jews fled Eastern Europe. Many headed for the United States.

For many Jews, the long history of exile and persecution convinced them to work for a homeland in Palestine. In the 1890s, a movement known as **Zionism** developed to pursue this goal. Its leader was Theodor Herzl (HEHRT•suhl), a writer in Vienna. It took many years, however, before the state of Israel was established.

SECTION

1

ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- suffrage
- Chartist movement
- Queen Victoria
- Third Republic
- Dreyfus affair
- anti-Semitism
- Zionism

USING YOUR NOTES

2. Which of these events most expanded democracy, and why?

Event	Evaluation

MAIN IDEAS

3. What were some effects of the Reform Bill of 1832?
4. What was the goal of the WSPU in Britain?
5. What was the Dreyfus affair?

CRITICAL THINKING & WRITING

6. **COMPARING** Why was the road to democracy more difficult for France than for England?
7. **SYNTHESIZING** Look again at the primary source on page 749. What is Pankhurst demanding?
8. **RECOGNIZING EFFECTS** What was the connection between anti-Semitism and Zionism?
9. **WRITING ACTIVITY** **POWER AND AUTHORITY** Among the Chartists' demands was pay for members of Parliament. Write a **letter to the editor** that supports or criticizes a pay raise for your legislators.

CONNECT TO TODAY CREATING A POSTER

Find information on issues in today's world that involve a call for social justice. Then make a **poster** in which you illustrate what you regard as the most compelling example of a current social injustice.



Self-Rule for British Colonies

MAIN IDEA

EMPIRE BUILDING Britain allowed self-rule in Canada, Australia, and New Zealand but delayed it for Ireland.

WHY IT MATTERS NOW

Canada, Australia, and New Zealand are strong democracies today, while Ireland is divided.

TERMS & NAMES

- dominion
- Maori
- Aborigine
- penal colony
- home rule
- Irish Republican Army

SETTING THE STAGE By 1800, Great Britain had colonies around the world. These included outposts in Africa and Asia. In these areas, the British managed trade with the local peoples, but they had little influence over the population at large. In the colonies of Canada, Australia, and New Zealand, on the other hand, European colonists dominated the native populations. As Britain industrialized and prospered in the 1800s, so did these colonies. Some were becoming strong enough to stand on their own.

Canada Struggles for Self-Rule

Canada was originally home to many Native American peoples. The first European country to colonize Canada was France. The earliest French colonists, in the 1600s and 1700s, had included many fur trappers and missionaries. They tended to live among the Native Americans. Some French intermarried with Native Americans.

Great Britain took possession of the country in 1763 after it defeated France in the French and Indian War. The French who remained lived mostly in the lower St. Lawrence Valley. Many English-speaking colonists arrived in Canada after it came under British rule. Some came from Great Britain, and others were Americans who had stayed loyal to Britain after the American Revolution. They settled separately from the French along the Atlantic seaboard and the Great Lakes.

French and English Canada Religious and cultural differences between the mostly Roman Catholic French and the mainly Protestant English-speaking colonists caused conflict in Canada. Both groups pressed Britain for a greater voice in governing their own affairs. In 1791 the British Parliament tried to resolve both issues by creating two new Canadian provinces. Upper Canada (now Ontario) had an English-speaking majority. Lower Canada (now Quebec) had a French-speaking majority. Each province had its own elected assembly.

The Durham Report The division of Upper and Lower Canada temporarily eased tensions. In both colonies, the royal governor and a small group of wealthy British held most of the power. But during the early 1800s, middle-class professionals in both colonies began to demand political and economic reforms. In Lower Canada, these demands were also fueled by French resentment toward British rule. In the late 1830s, rebellions broke out in both Upper and Lower



Use the graphic organizer online to take notes on the political events in each British colony that led to self-rule.

History *in* Depth



Acadians to Cajuns

Colonists from France founded the colony of Acadia on the eastern coast of what is now Canada in 1604. Tensions flared between these settlers and later arrivals from England and Scotland.

In 1713, the British gained control of Acadia and renamed it Nova Scotia (New Scotland). They expelled thousands of descendants of the original Acadians. Many eventually settled in southern Louisiana. Today, their culture still thrives in the Mississippi Delta area, where the people are called Cajuns (an alteration of Acadian).

Canada. The British Parliament sent a reform-minded statesman, Lord Durham, to investigate.

In 1839, Durham sent a report to Parliament that urged two major reforms. First, Upper and Lower Canada should be reunited as the Province of Canada, and British immigration should be encouraged. In this way, the French would slowly become part of the dominant English culture. Second, colonists in the provinces of Canada should be allowed to govern themselves in domestic matters. **A**

The Dominion of Canada By the mid-1800s, many Canadians believed that Canada needed a central government. A central government would be better able to protect the interests of Canadians against the United States, whose territory now extended from the Atlantic to the Pacific oceans. In 1867, Nova Scotia and New Brunswick joined the Province of Canada to form the Dominion of Canada. As a **dominion**, Canada was self-governing in domestic affairs but remained part of the British Empire.

Canada's Westward Expansion Canada's first prime minister, John MacDonal, expanded Canada westward by purchasing lands and persuading frontier territories to join the union. Canada stretched to the Pacific Ocean by 1871. MacDonal began the construction of a transcontinental railroad, completed in 1885.

Australia and New Zealand

The British sea captain James Cook claimed New Zealand in 1769 and part of Australia in 1770 for Great Britain. Both lands were already inhabited. In New Zealand, Cook was greeted by the **Maori**, a Polynesian people who had settled in New Zealand around A.D. 800. Maori culture was based on farming, hunting, and fishing.

When Cook reached Australia, he considered the land uninhabited. In fact, Australia was sparsely populated by **Aborigines**, as Europeans later called the native peoples. Aborigines are the longest ongoing culture in the world. These nomadic peoples fished, hunted, and gathered food.

Britain's Penal Colony Britain began colonizing Australia in 1788 with convicted criminals. The prisons in England were severely overcrowded. To solve this problem, the British government established a penal colony in Australia. A **penal colony** was a place where convicts were sent to serve their sentences. Many European nations used penal colonies as a way to prevent overcrowding of prisons. After their release, the newly freed prisoners could buy land and settle.

Free Settlers Arrive Free British settlers eventually joined the former convicts in both Australia and New Zealand. In the early 1800s, an Australian settler experimented with breeds of sheep until he found one that produced high quality wool and thrived in the country's warm, dry weather. Although sheep are not native to Australia, the raising and exporting of wool became its biggest business.

To encourage immigration, the government offered settlers cheap land. The population grew steadily in the early 1800s and then skyrocketed after a gold rush in 1851. The scattered settlements on Australia's east coast grew into separate colonies. Meanwhile, a few pioneers pushed westward across the vast dry interior and established outposts in western Australia.

MAIN IDEA

Recognizing Effects

A How do you think Durham's report affected French-speaking Canadians?



Australia and New Zealand to 1850

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INTERACTIVE MAP

Climate Regions

- Desert
- Grassland
- Mediterranean
- Rain forest
- Savanna
- Woodlands
- Densest Aborigine or Maori populations, around 1770
- Date of European settlement



GEOGRAPHY SKILLBUILDER: Interpreting Maps

1. **Region** What sort of climate region is found along the eastern coast of Australia?
2. **Region** What regions of Australia and New Zealand were most densely inhabited by native peoples?

Settling New Zealand European settlement of New Zealand grew more slowly. This was because Britain did not claim ownership of New Zealand, as it did Australia. Rather, it recognized the land rights of the Maori. In 1814, missionary groups began arriving from Australia seeking to convert the Maori to Christianity.

The arrival of more foreigners stirred conflicts between the Maori and the European settlers over land. Responding to the settlers' pleas, the British decided to annex New Zealand in 1839 and appointed a governor to negotiate with the Maori. In a treaty signed in 1840, the Maori accepted British rule in exchange for recognition of their land rights.

Self-Government Like Canadians, the colonists of Australia and New Zealand wanted to rule themselves yet remain in the British Empire. During the 1850s, the colonies in both Australia and New Zealand became self-governing and created parliamentary forms of government. In 1901, the Australian colonies were united under a federal constitution as the Commonwealth of Australia. During the early 1900s, both Australia and New Zealand became dominions.

The people of Australia and New Zealand pioneered a number of political reforms. For example, the secret ballot, sometimes called the Australian ballot, was first used in Australia in the 1850s. In 1893, New Zealand became the first nation in the world to give full voting rights to women. However, only white women gained these rights.

Status of Native Peoples Native peoples and other non-Europeans were excluded from democracy and prosperity. Diseases brought by the Europeans killed Aborigines and Maori. As Australian settlement grew, the colonists displaced or killed many Aborigines.

In New Zealand, tensions between settlers and Maori continued to grow after it became a British colony. Between 1845 and 1872, the colonial government fought the Maori in a series of wars. Reduced by disease and outgunned by British weapons, the Maori were finally driven into a remote part of the country. **B**

▼ This photograph shows a Maori warrior with traditional dress and face markings.



MAIN IDEA

Contrasting

B How did the colonial settlement of Australia and New Zealand differ?

The Irish Win Home Rule

English expansion into Ireland had begun in the 1100s, when the pope granted control of Ireland to the English king. English knights invaded Ireland, and many settled there to form a new aristocracy. The Irish, who had their own ancestry, culture, and language, bitterly resented the English presence. Laws imposed by the English in the 1500s and 1600s limited the rights of Catholics and favored the Protestant religion and the English language.

Over the years, the British government was determined to maintain its control over Ireland. It formally joined Ireland to Britain in 1801. Though a setback for Irish nationalism, this move gave Ireland representation in the British Parliament. Irish leader Daniel O’Connell persuaded Parliament to pass the Catholic Emancipation Act in 1829. This law restored many rights to Catholics.

The Great Famine In the 1840s, Ireland experienced one of the worst famines of modern history. For many years, Irish peasants had depended on potatoes as virtually their sole source of food. From 1845 to 1848, a plant fungus ruined nearly all of Ireland’s potato crop. Out of a population of 8 million, about a million people died from starvation and disease over the next few years.

During the famine years, about a million and a half people fled from Ireland. Most went to the United States; others went to Britain, Canada, and Australia. At home, in Ireland, the British government enforced the demands of the English landowners that the Irish peasants pay their rent. Many Irish lost their land and fell hopelessly in debt, while large landowners profited from higher food prices.

Demands for Home Rule During the second half of the 1800s, opposition to British rule over Ireland took two forms. Some Irish wanted independence for Ireland. A greater number of Irish preferred **home rule**, local control over internal

> Analyzing Primary Sources

Starvation in Ireland

A traveler described what he saw on a journey through Ireland in 1847:

PRIMARY SOURCE

We entered a cabin. Stretched in one dark corner, scarcely visible, from the smoke and rags that covered them, were three children huddled together, lying there because they were too weak to rise, pale and ghastly, their little limbs—on removing a portion of the filthy covering—perfectly emaciated, eyes sunk, voice gone, and evidently in the last stage of actual starvation.

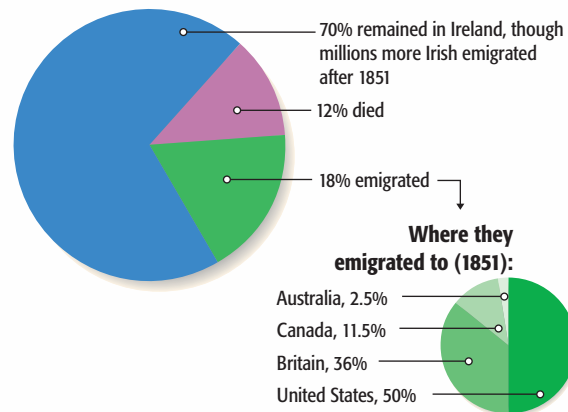
WILLIAM BENNETT, quoted in *Narrative of a Recent Journey of Six Weeks in Ireland*

DOCUMENT-BASED QUESTIONS

- Determining Main Ideas** What was the effect of the destruction of Ireland’s potato crop on the population of Ireland?
- Clarifying** How did 18 percent of the population deal with the famine?
- Comparing** Which country received the most Irish emigrants?

The Great Famine, 1845–1851

Fate of the Irish during the famine:



Sources: R. F. Foster, *Modern Ireland, 1600–1972*; D. Fitzpatrick, *Irish Emigration, 1804–1921*

Northern Ireland Today

When Northern Ireland decided to stay united with Great Britain, many Catholics there refused to accept the partition, or division. In the late 1960s, Catholic groups began to demonstrate for more civil rights.

Their protests touched off fighting between Catholics and Protestants. Militant groups on both sides engaged in terrorism. This violent period, called the “troubles,” continued into the 1990s.

In 1999, with a peace accord, Catholics and Protestants began sharing power in a new home-rule government. In May 2007, home rule returned under a new power-sharing government.

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INTERNET ACTIVITY Go online to research and design a Web page about the peace process in Northern Ireland today. Include key figures in the peace process, especially Gerry Adams and David Trimble.

matters only. The British, fearful of Irish moves toward independence, refused to consider either option.

One reason for Britain’s opposition to home rule was concern for Ireland’s Protestants. They feared being a minority in a country dominated by Catholics. Most Protestants lived in the northern part of Ireland, known as Ulster. Finally, in 1914, Parliament enacted a home rule bill for southern Ireland. Just one month before the plan was to take effect, World War I broke out in Europe. Irish home rule was put on hold.


Rebellion and Division Frustrated over the delay in gaining independence, a small group of Irish nationalists rebelled in Dublin during Easter week, 1916. British troops put down the Easter Rising and executed its leaders. Their fate, however, aroused wider popular support for the nationalist movement.

After World War I, the Irish nationalists won a victory in the elections for the British Parliament. To protest delays in home rule, the nationalist members decided not to attend Parliament. Instead, they formed an underground Irish government and declared themselves independent. The **Irish Republican Army** (IRA), an unofficial military force seeking independence for Ireland, staged a series of attacks against British officials in Ireland. The attacks sparked war between the nationalists and the British government.

In 1921, Britain divided Ireland and granted home rule to southern Ireland. Ulster, or Northern Ireland, remained a part of Great Britain. The south became a dominion called the Irish Free State. However, many Irish nationalists, led by Eamon De Valera, continued to seek total independence from Britain. In 1949, the Irish Free State declared itself the independent Republic of Ireland. 

MAIN IDEA

Evaluating Decisions

 Was Britain’s policy in dividing Ireland successful? Why or why not?

SECTION 2 ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- dominion
- Maori
- Aborigine
- penal colony
- home rule
- Irish Republican Army

USING YOUR NOTES

2. In what ways was Ireland different from the other three colonies?

Country	Political Events
Canada	
Australia	
New Zealand	

MAIN IDEAS

3. What were the two major reforms urged by the Durham report?
4. What was unusual about the first European settlers in Australia?
5. What are the main countries to which the Irish emigrated during the famine?

CRITICAL THINKING & WRITING

6. **COMPARING** How was Britain’s policy toward Canada beginning in the late 1700s similar to its policy toward Ireland in the 1900s?
7. **DRAWING CONCLUSIONS** What impact did the Great Famine have on the population of Ireland?
8. **CLARIFYING** Why did Britain create Upper Canada and Lower Canada, and who lived in each colony?
9. **WRITING ACTIVITY** **EMPIRE BUILDING** Britain encouraged emigration to each of the colonies covered in this section. What effects did this policy have on these areas? Write a **paragraph** in which you provide an explanation.

MULTIMEDIA ACTIVITY CREATING A BAR GRAPH




Use the Internet to find information on Irish emigration to the United States. Create a **bar graph** showing the years when the largest numbers of Irish came to the United States.

INTERNET KEYWORD
Irish immigration

Life in Early Australia

European explorers located Australia long after they had begun colonizing other lands. Dutch explorers were probably the first Europeans to reach Australia around 1605. Australia was not claimed by a European power, however, until the British did so in 1770.

Early Australia had many groups of people with diverse interests, including a native population that had lived on the island for at least 40,000 years. On these pages you will discover the occupations, motivations, and interests of some Australians in the 17th and 18th centuries.

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RESEARCH WEB LINKS Go online for more on early Australia.

▼ Gold Miners

In 1851, lured by the potential of striking it rich, thousands of people began prospecting for gold in Australia. Sometimes whole families moved to the gold fields, but life in the gold camps was hard and very few people struck it rich. Searching for gold was hard and dirty work, as this painting illustrates.

▼ Original Australians

Aboriginal society developed in close harmony with nature. There were between 200 and 300 Aboriginal languages, and most people were bilingual or multilingual. By 1900, half of Australia's original inhabitants had died fighting the British or from disease. The engraving below depicts an Aboriginal man with ceremonial face paint and scars. The other image below is an ancient Aboriginal rock painting.



> DATA FILE

Australia Today

- Australia still mines gold, but it also produces 95 percent of the world's precious opals and 99 percent of black opals.
- Australia has 24 million head of cattle and is the world's largest exporter of beef.
- Australians had 8.6 million cell phones in 2000.

Australia's Population

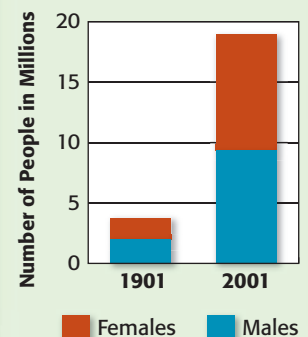
- In 2001, there was an average of 6.5 people per square mile in Australia. That same year in the United States there were 77.8 people per square mile.
- In Australia's 2001 census, 410,003 people identified themselves as being of indigenous origin.



▲ Farmers and Ranchers

Free settlers made the journey to Australia willingly. Many went into farming and ranching. Farms provided much-needed food, and sheep ranching provided wool as a valuable export. Convicts were hired out to farmers and ranchers as cheap labor. Sheep ranching, shown in the picture above, remains an important part of Australia's economy.

Australia's Population



▼ Convicts

Beginning in 1788, England sent both male and female prisoners to Australia—sometimes with their children. Convicts built public buildings, roads, and bridges. England stopped sending convicts to Australia in 1868. The prison ship shown here housed prisoners before they went to Australia.



Connect to Today

1. Forming and Supporting Opinions

Of the groups represented on this page, which do you believe had highest quality of living? Why?

See Skillbuilder Handbook, page R20.

2. Comparing and Contrasting

Use the Internet to research the issues that Australian Aborigines and Native Americans in the United States face today and compare them. How are they similar? How are they different?



3

War and Expansion in the United States

MAIN IDEA

POWER AND AUTHORITY The United States expanded across North America and fought a civil war.

WHY IT MATTERS NOW

The 20th-century movements to ensure civil rights for African Americans and others are a legacy of this period.

TERMS & NAMES

- manifest destiny
- Abraham Lincoln
- secede
- U.S. Civil War
- Emancipation Proclamation
- segregation

SETTING THE STAGE The United States won its independence from Britain in 1783. At the end of the Revolutionary War, the Mississippi River marked the western boundary of the new republic. As the original United States filled with settlers, land-hungry newcomers pushed beyond the Mississippi. The government helped them by acquiring new territory for settlement. Meanwhile, tensions between northern and southern states over the issues of states' rights and slavery continued to grow and threatened to reach a boiling point.

Americans Move West

In 1803, President Thomas Jefferson bought the Louisiana Territory from France. The Louisiana Purchase doubled the size of the new republic and extended its boundary to the Rocky Mountains. In 1819, Spain gave up Florida to the United States. In 1846, a treaty with Great Britain gave the United States part of the Oregon Territory. The nation now stretched from the Atlantic to the Pacific oceans.

Manifest Destiny Many Americans believed in **manifest destiny**, the idea that the United States had the right and duty to rule North America from the Atlantic Ocean to the Pacific Ocean. Government leaders used manifest destiny to justify evicting Native Americans from their tribal lands.

The Indian Removal Act of 1830 made such actions official policy. This law enabled the federal government to force Native Americans living in the East to move to the West. Georgia's Cherokee tribe challenged the law before the Supreme Court. The Court, however, ruled that the suit was not valid. The Cherokees had to move. Most of them traveled 800 miles to Oklahoma, mainly on foot, on a journey later called the Trail of Tears. About a quarter of the Cherokees died on the trip. A survivor recalled how the journey began:

PRIMARY SOURCE

The day was bright and beautiful, but a gloomy thoughtfulness was depicted in the lineaments of every face. . . . At this very moment a low sound of distant thunder fell on my ear . . . and sent forth a murmur, I almost thought a voice of divine indignation for the wrong of my poor and unhappy countrymen, driven by brutal power from all they loved and cherished in the land of their fathers.

WILLIAM SHOREY COODEY, quoted in *The Trail of Tears*



Use the graphic organizer online to take notes on major events of the United States in the 19th century.

When the Cherokees reached their destination, they ended up on land inferior to that which they had left. As white settlers moved west during the 19th century, the government continued to push Native Americans off their land.

Texas Joins the United States When Mexico had gained its independence from Spain in 1821, its territory included the lands west of the Louisiana Purchase. With Mexico's permission, American settlers moved into the Mexican territory of Texas. However, settlers were unhappy with Mexico's rule.

In 1836, Texans revolted against Mexican rule and won their independence. Then, in 1845, the United States annexed Texas. Since Mexico still claimed Texas, it viewed this annexation as an act of war.

War with Mexico Between May 1846 and February 1848, war raged between the two countries. Finally, Mexico surrendered. As part of the settlement of the Mexican-American War, Mexico ceded territory to the United States. The Mexican Cession included California and a huge area in the Southwest. In 1853, the Gadsden Purchase from Mexico brought the lower continental United States to its present boundaries.

Civil War Tests Democracy

America's westward expansion raised questions about what laws and customs should be followed in the West. Since the nation's early days, the northern and southern parts of the United States had followed different ways of life. Each section wanted to extend its own way of life to the new territories and states in the West.

North and South The North had a diversified economy, with both farms and industry. For both its factories and farms, the North depended on free workers. The South's economy, on the other hand, was based on just a few cash crops, mainly cotton. Southern planters relied on slave labor. **A**

The economic differences between the two regions led to a conflict over slavery. Many Northerners considered slavery morally wrong. They wanted to outlaw slavery in the new western states. Most white Southerners believed slavery was necessary for their economy. They wanted laws to protect slavery in the West so that they could continue to raise cotton on the fertile soil there.

The disagreement over slavery fueled a debate about the rights of the individual states against those of the federal government. Southern politicians argued that the states had freely joined the Union, and so they could freely leave. Most Northerners felt that the Constitution had established the Union once and for all.

Civil War Breaks Out Conflict between the North and South reached a climax in 1860, when **Abraham Lincoln** was elected president. Southerners fiercely



GEOGRAPHY SKILLBUILDER: Interpreting Maps

- 1. Movement** What was the first territory to be added to the United States after 1783?
- 2. Region** What present-day states were part of the Mexican Cession?

HISTORY

VIDEO

Independence for Texas: The Mexican-American War

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MAIN IDEA

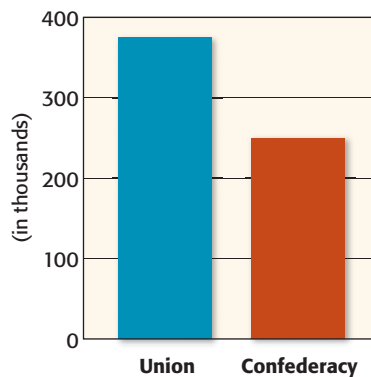
Contrasting

A What were the main economic differences between the Northern and Southern states?

Civil War in the United States, 1861–1865



Civil War Deaths



GEOGRAPHY SKILLBUILDER: Interpreting Maps

- 1. Movement** What can you tell about the strategy of the North to defeat the South?
- 2. Human-Environment Interaction** Which side do you think suffered the most devastation? Why?

opposed Lincoln, who had promised to stop the spread of slavery. One by one, Southern states began to **secede**, or withdraw, from the Union. These states came together as the Confederate States of America.

On April 12, 1861, Confederate forces fired on Fort Sumter, a federal fort in Charleston, South Carolina. Lincoln ordered the army to bring the rebel states back into the Union. The **U.S. Civil War** had begun. Four years of fighting followed, most of it in the South. Although the South had superior military leadership, the North had a larger population, better transportation, greater resources, and more factories. These advantages proved too much, and in April 1865, the South surrendered.

Abolition of Slavery Lincoln declared that the war was being fought to save the Union and not to end slavery. He eventually decided that ending slavery would help to save the Union. Early in 1863, he issued the **Emancipation Proclamation**, declaring that all slaves in the Confederate states were free. **B**

At first, the proclamation freed no slaves, because the Confederate states did not accept it as law. As Union armies advanced into the South, however, they freed slaves in the areas they conquered. The Emancipation Proclamation also showed European nations that the war was being fought against slavery. As a result, these nations did not send the money and supplies that the South had hoped they would.

In the aftermath of the war, the U.S. Congress passed the Thirteenth Amendment to the Constitution, which abolished slavery in the United States. The Fourteenth and Fifteenth Amendments extended the rights of citizenship to all Americans and guaranteed former slaves the right to vote.

Reconstruction From 1865 to 1877, Union troops occupied the South and enforced the constitutional protections. This period is called Reconstruction. After federal troops left the South, white Southerners passed laws that limited African

MAIN IDEA

Analyzing Issues


B Did the Emancipation Proclamation reflect a change in Lincoln's main goal for the war?

Americans' rights and made it difficult for them to vote. Such laws also encouraged **segregation**, or separation, of blacks and whites in the South. African Americans continued to face discrimination in the North as well.

The Postwar Economy

The need for mass production and distribution of goods during the Civil War speeded industrialization. After the war, the United States experienced industrial expansion unmatched in history. By 1914, it was a leading industrial power.


Immigration Industrialization could not have occurred so rapidly without immigrants. During the 1870s, immigrants arrived at a rate of nearly 2,000 a day. By 1914, more than 20 million people had moved to the United States from Europe and Asia. Many settled in the cities of the Northeast and Midwest. Others settled in the open spaces of the West.

The Railroads As settlers moved west, so did the nation's rail system. In 1862, Congress had authorized money to build a transcontinental railroad. For seven years, immigrants and other workers dug tunnels, built bridges, and laid track. When the railroad was completed in 1869, railroads linked California with the eastern United States. 

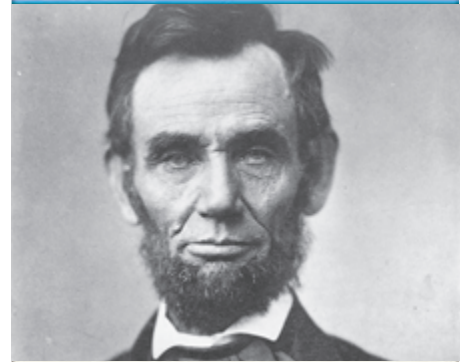
By 1900, nearly 200,000 miles of track crossed the nation. This system linked farm to city and boosted trade and industry. The railroads bought huge quantities of steel. Also, trains brought materials such as coal and iron ore to factories and moved the finished goods to market. They carried corn, wheat, and cattle from the Great Plains to processing plants in St. Louis, Chicago, and Minneapolis. These developments helped to make the United States a world leader.

MAIN IDEA

Recognizing Effects

 How did railroads affect the growth of the United States?

History Makers



Abraham Lincoln
1809–1865

Lincoln passionately believed in preserving the Union. His upbringing might help explain why. The son of rural, illiterate parents, he educated himself. After working as rail splitter, boatman, storekeeper, and surveyor, he taught himself to be a lawyer. This career path led eventually to the White House.

In Europe, people stayed at the level of society into which they had been born. Yet the United States had been founded on the belief that all men were created equal. Small wonder that Lincoln fought to preserve the democracy he described as the "last best hope of earth."

SECTION

3

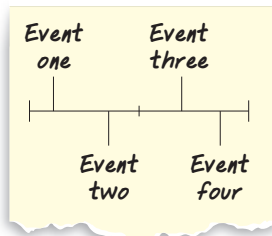
ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- manifest destiny
- Abraham Lincoln
- secede
- U.S. Civil War
- Emancipation Proclamation
- segregation

USING YOUR NOTES

2. Which events contributed to U.S. expansion?



MAIN IDEAS

3. What territory did the Mexican-American War open up to American settlers?
4. What were some of the economic differences between the North and the South before the Civil War?
5. How did the Civil War speed up America's industrialization?

CRITICAL THINKING & WRITING

6. **DISTINGUISHING FACT FROM OPINION** Reread the quotation from William Shorey Coodey on page 758. What facts are conveyed in his statement? What opinions does he express about the Trail of Tears?
7. **COMPARING** What were the relative resources of the North and South in the U.S. Civil War?
8. **MAKING INFERENCES** How might the Mexican Cession (see map, page 759) have consequences today?
9. **WRITING ACTIVITY** **POWER AND AUTHORITY** Imagine that you are making the westward journey by wagon train. Write a number of **journal entries** describing your experience.

CONNECT TO TODAY MAKING A TABLE

Find information on countries today that are experiencing civil wars or conflicts. Make a **table** that includes the name of each country, the continent it is located on, and the dates of the conflict.



Nineteenth-Century Progress

MAIN IDEA

SCIENCE AND TECHNOLOGY
Breakthroughs in science and technology transformed daily life and entertainment.

WHY IT MATTERS NOW

Electric lights, telephones, cars, and many other conveniences of modern life were invented during this period.

TERMS & NAMES

- assembly line
- Charles Darwin
- theory of evolution
- radioactivity
- psychology
- mass culture

SETTING THE STAGE The Industrial Revolution happened because of inventions such as the spinning jenny and the steam engine. By the late 1800s, advances in both industry and technology were occurring faster than ever before. In turn, the demands of growing industries spurred even greater advances in technology. A surge of scientific discovery pushed the frontiers of knowledge forward. At the same time, in industrialized countries, economic growth produced many social changes.

Inventions Make Life Easier



Use the graphic organizer online to take notes on inventors and the impact of their inventions.

In the early 1800s, coal and steam drove the machines of industry. By the late 1800s, new kinds of energy were coming into use. One was gasoline (made from oil), which powered the internal combustion engine. This engine would make the automobile possible. Another kind of energy was electricity. In the 1870s, the electric generator was developed, which produced a current that could power machines.

Edison the Inventor During his career, Thomas Edison patented more than 1,000 inventions, including the light bulb and the phonograph. Early in his career, Edison started a research laboratory in Menlo Park, New Jersey. Most of his important inventions were developed there, with help from the researchers he employed, such as Lewis H. Latimer, an African-American inventor. Indeed, the idea of a research laboratory may have been Edison's most important invention.

Bell and Marconi Revolutionize Communication Other inventors helped harness electricity to transmit sounds over great distances. Alexander Graham Bell was a teacher of deaf students who invented the telephone in his spare time. He displayed his device at the Philadelphia Centennial Exposition of 1876.

The Italian inventor Guglielmo Marconi used theoretical discoveries about electromagnetic waves to create the first radio in 1895. This device was important because it sent messages (using Morse Code) through the air, without the use of wires. Primitive radios soon became standard equipment for ships at sea.

Ford Sparks the Automobile Industry In the 1880s, German inventors used a gasoline engine to power a vehicle—the automobile. Automobile technology developed quickly, but since early cars were built by hand, they were expensive.

An American mechanic named Henry Ford decided to make cars that were affordable for most people. Ford used standardized, interchangeable parts. He




INTERACTIVE HISTORY

Explore New York City in the late 1800s.

Edison's Inventions

Thomas Alva Edison was one of the greatest inventors in history. He held thousands of patents for his inventions in over 30 countries. The United States Patent Office alone issued Edison 1,093 patents. Among his inventions was an electric light bulb, the phonograph, and motion pictures, all shown on this page.

Some scientists and historians, however, believe that Edison's greatest achievement was his development of the research laboratory. Edison (shown at right in his West Orange, New Jersey, laboratory in 1915) worked with a team of specialists to produce his creations. His precise manner is illustrated by his famous quote: "Genius is 1 percent inspiration and 99 percent perspiration."

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RESEARCH WEB LINKS Go online for more on Thomas Alva Edison.



H
HISTORY

VIDEO

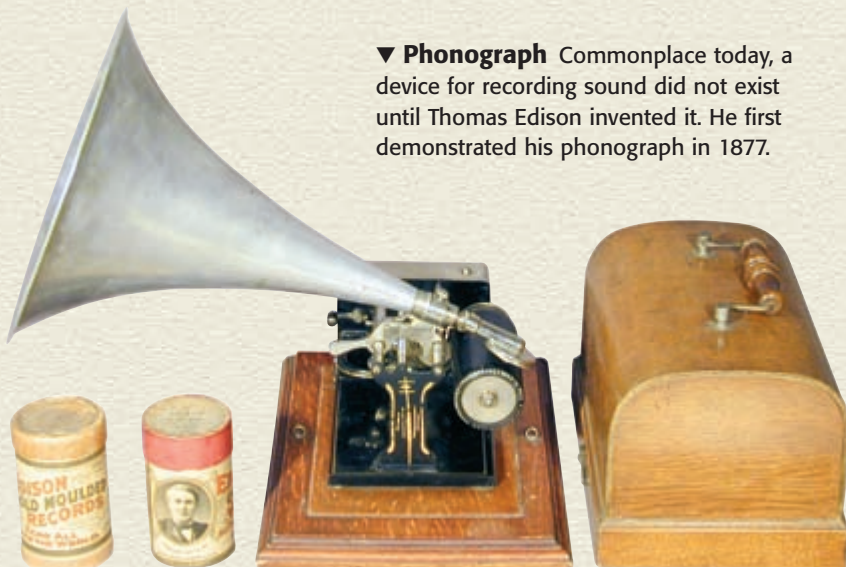
Thomas A. Edison: Father of Invention

 hmhsocialstudies.com

▼ **Motion pictures** The idea of "moving pictures" was not Edison's, but his "Kinetoscope," shown below, made movies practical.



▼ **Phonograph** Commonplace today, a device for recording sound did not exist until Thomas Edison invented it. He first demonstrated his phonograph in 1877.



▲ **Light bulb** Edison and his team are working on an electric light bulb in this painting. Edison's inventions often developed from existing technologies. Many people were working on an electric light bulb, but Edison made it practical.

Connect to Today

1. Clarifying What did Edison mean when he said, "Genius is 1 percent inspiration and 99 percent perspiration"?

 See Skillbuilder Handbook, page R4.

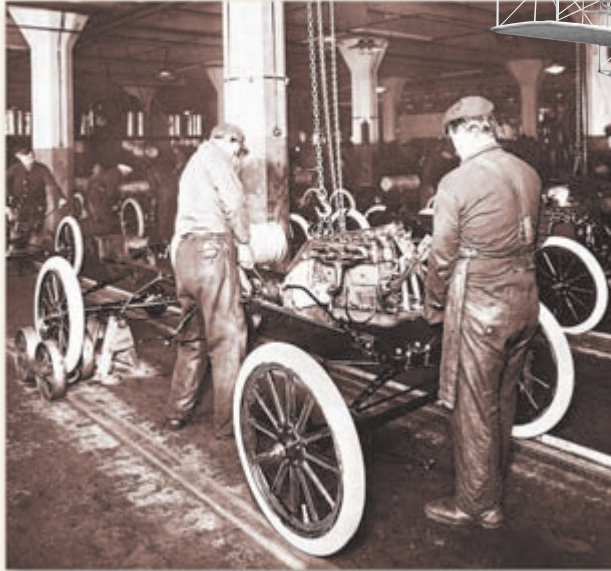
2. Forming and Supporting Opinions Which of Edison's inventions shown on this page do you think has had the most influence?

An Age of Inventions



▲ Telephone

Alexander Graham Bell demonstrated the first telephone in 1876. It quickly became an essential of modern life. By 1900, there were 1.4 million telephones in the United States. By 1912, there were 8.7 million.



▲ Airplane

Through trial and error, the Wright brothers designed wings that provided lift and balance in flight. Their design is based on principles that are still used in every aircraft.

◀ Automobile Assembly Line

Ford's major innovation was to improve efficiency in his factory. By introducing the assembly line, he reduced the time it took to build a car from 12.5 to 1.5 worker-hours.

also built them on an **assembly line**, a line of workers who each put a single piece on unfinished cars as they passed on a moving belt.

Assembly line workers could put together an entire Model T Ford in less than two hours. When Ford introduced this plain, black, reliable car in 1908, it sold for \$850. As his production costs fell, Ford lowered the price. Eventually it dropped to less than \$300. Other factories adopted Ford's ideas. By 1916, more than 3.5 million cars were traveling around on America's roads. **A**

The Wright Brothers Fly Two bicycle mechanics from Dayton, Ohio, named Wilbur and Orville Wright, solved the age-old riddle of flight. On December 17, 1903, they flew a gasoline-powered flying machine at Kitty Hawk, North Carolina. The longest flight lasted only 59 seconds, but it started the aircraft industry.

New Ideas in Medicine

As you learned in Chapter 22, earlier centuries had established the scientific method. Now this method brought new insights into nature as well as practical results.

The Germ Theory of Disease An important breakthrough in the history of medicine was the germ theory of disease. It was developed by French chemist Louis Pasteur in the mid-1800s. While examining the fermentation process of alcohol, Pasteur discovered that it was caused by microscopic organisms he called bacteria. He also learned that heat killed bacteria. This led him to develop the process of pasteurization to kill germs in liquids such as milk. Soon, it became clear to Pasteur and others that bacteria also caused diseases.

Joseph Lister, a British surgeon, read about Pasteur's work. He thought germs might explain why half of surgical patients died of infections. In 1865, he ordered that his surgical wards be kept spotlessly clean. He insisted that wounds be washed in antiseptics, or germ-killing liquids. As a result, 85 percent of Lister's patients survived. Other hospitals adopted Lister's methods.

Public officials, too, began to understand that cleanliness helped prevent the spread of disease. Cities built plumbing and sewer systems and took other steps to improve public health. Meanwhile, medical researchers developed vaccines or cures for such deadly diseases as typhus, typhoid fever, diphtheria, and yellow fever. These advances helped people live longer, healthier lives.

MAIN IDEA

Making Inferences

A Why do you think Ford reduced the price of the Model T?

New Ideas in Science

No scientific idea of modern times aroused more controversy than the work of English naturalist **Charles Darwin**. The cause of the controversy was Darwin's answer to the question that faced biologists: How can we explain the tremendous variety of plants and animals on earth? A widely accepted answer in the 1800s was the idea of special creation—every kind of plant and animal had been created by God at the beginning of the world and had remained the same since then.

Darwin's Theory of Evolution Darwin challenged the idea of special creation. Based on his research as a naturalist on the voyage of the *H.M.S. Beagle*, he developed a theory that all forms of life, including human beings, evolved from earlier living forms that had existed millions of years ago.

In 1859, Darwin published his thinking in a book titled *On the Origin of Species by Means of Natural Selection*. According to the idea of natural selection, populations tend to grow faster than the food supply and so must compete for food. The members of a species that survive are those that are fittest, or best adapted to their environment. These surviving members of a species produce offspring that share their advantages. Gradually, over many generations, the species may change. In this way, new species evolve. Darwin's idea of change through natural selection came to be called the **theory of evolution**. **B**

MAIN IDEA

Clarifying

B According to Darwin, how does natural selection affect evolution?

Mendel and Genetics Although Darwin said that living things passed on their variations from one generation to the next, he did not know how they did so. In the 1850s and 1860s, an Austrian monk named Gregor Mendel discovered that there is a pattern to the way that certain traits are inherited. Although his work was not widely known until 1900, Mendel's work began the science of genetics.

Advances in Chemistry and Physics In 1803, the British chemist John Dalton theorized that all matter is made of tiny particles called atoms. Dalton showed that elements contain only one kind of atom, which has a specific weight. Compounds, on the other hand, contain more than one kind of atom.

In 1869, Dmitri Mendeleev (MEHN•duh•LAY•uhf), a Russian chemist, organized a chart on which all the known elements were arranged in order of weight, from lightest to heaviest. He left gaps where he predicted that new elements would be discovered. Later, his predictions proved correct. Mendeleev's chart, the Periodic Table, is still used today.

A husband and wife team working in Paris, Marie and Pierre Curie, discovered two of the missing elements, which they named radium and polonium. The elements were found in a mineral called pitchblende that released a powerful form of energy. In 1898, Marie Curie gave this energy the name **radioactivity**. In 1903, the Curies shared the Nobel Prize for physics for their work on radioactivity. In 1911, Marie Curie won the Nobel Prize for chemistry for the discovery of radium and polonium.

Physicists around 1900 continued to unravel the secrets of the atom. Earlier scientists believed that the atom was the smallest particle that existed. A British physicist named

History Makers



Marie Curie
1867–1934

Marie Curie's original name was Marya Skłodowska. Born in Warsaw, Poland, she emigrated to Paris to study, where she changed her name to Marie.

She achieved a number of firsts in her career. She was the first woman to teach in the Sorbonne, a world-famous college that was part of the University of Paris. She was the first woman to win a Nobel Prize—two, in fact.

In 1911, she won the Nobel prize for chemistry. In 1921, she made a journey to the U.S. In 1934, she died from leukemia caused by the radiation she had been exposed to in her work.

 hmhsocialstudies.com

RESEARCH WEB LINKS Go online for more on Marie Curie.



Social Darwinism

Charles Darwin (above) was a naturalist, but a number of 19th-century thinkers tried to apply his ideas to economics and politics. The leader in this movement was Herbert Spencer, an English philosopher.

Free economic competition, Spencer argued, was natural selection in action. The best companies make profits, while inefficient ones go bankrupt. Spencer applied the same rules to individuals. Those who were fittest for survival enjoyed wealth and success, while the poor remained poor because they were unfit. This idea became known as Social Darwinism. It also provided a rationalization for imperialism and colonialism.



VIDEO

Charles Darwin:
Evolution's Voice

hmhsocialstudies.com


Ernest Rutherford suggested that atoms were made up of yet smaller particles. Each atom, he said, had a nucleus surrounded by one or more particles called electrons. Soon other physicists such as Max Planck, Neils Bohr, and Albert Einstein were studying the structure and energy of atoms.

Social Sciences Explore Behavior

The scientific theories of the 1800s prompted scholars to study human society and behavior in a scientific way. Interest in these fields grew enormously during that century, as global expeditions produced a flood of new discoveries about ancient civilizations and world cultures. This led to the development of modern social sciences such as archaeology, anthropology, and sociology.


An important new social science was **psychology**, the study of the human mind and behavior. The Russian physiologist Ivan Pavlov believed that human actions were often unconscious reactions to experiences and could be changed by training.


Another pioneer in psychology, the Austrian doctor Sigmund Freud, also believed that the unconscious mind drives how people think and act. In Freud's view, unconscious forces such as suppressed memories, desires, and impulses shape behavior. He founded a type of therapy called psychoanalysis to deal with psychological conflicts created by these forces.

Freud's theories became very influential. However, his idea that the mind was beyond conscious control also shocked many people. The theories of Freud and Pavlov challenged the fundamental idea of the Enlightenment—that reason was supreme. The new ideas about psychology began to shake the 19th-century faith that humans could perfect themselves and society through reason. 

MAIN IDEA

Clarifying

 Why was the work of Pavlov and Freud groundbreaking?

that reason was supreme. The new ideas about psychology began to shake the 19th-century faith that humans could perfect themselves and society through reason. 

The Rise of Mass Culture

In earlier periods, art, music, and theater were enjoyed by the wealthy. This group had the money, leisure time, and education to appreciate high culture. It was not until about 1900 that people could speak of **mass culture**—the appeal of art, writing, music, and other forms of entertainment to a larger audience.

Changes Produce Mass Culture There were several causes for the rise of mass culture. Their effects changed life in Europe and North America. Notice in the chart on the next page how working class people's lives were changed by mass culture. The demand for leisure activities resulted in a variety of new pursuits for people to enjoy. People went to music performances, movies, and sporting events.

Music Halls, Vaudeville, and Movies A popular leisure activity was a trip to the local music hall. On a typical evening, a music hall might offer a dozen or more different acts. It might feature singers, dancers, comedians, jugglers, magicians, and acrobats. In the United States, musical variety shows were called vaudeville. Vaudeville acts traveled from town to town, appearing at theaters.

During the 1880s, several inventors worked at trying to project moving images. One successful design came from France. Another came from Thomas Edison's laboratory. The earliest motion pictures were black and white and lasted less than a minute.

Rise of Mass Culture		
Cause	Effect/Cause	Effect
• Public education	• Increase in literacy	• Mass market for books and newspapers
• Improvement in communications	• Publications cheaper and more accessible	• Mass market for books and newspapers
• Invention of phonograph and records	• More music directly in people's homes	• Greater demand for musical entertainment
• Shorter workday—10 hours shorter workweek—5-1/2 days	• More leisure time	• Greater demand for mass entertainment activities

SKILLBUILDER: Interpreting Charts

- Analyzing Causes** *What was the immediate cause for the increased demand for mass entertainment activities?*
- Recognizing Effects** *What was the ultimate effect of public education and improved communications?*

By the early 1900s, filmmakers were producing the first feature films. Movies quickly became big business. By 1910, five million Americans attended some 10,000 theaters each day. The European movie industry experienced similar growth.

Sports Entertain Millions With time at their disposal, more people began to enjoy sports and outdoor activities. Spectator sports now became entertainment. In the United States, football and baseball soared in popularity. In Europe, the first professional soccer clubs formed and drew big crowds. Favorite English sports such as cricket spread to the British colonies of Australia, India, and South Africa.

As a result of the growing interest in sports, the International Olympic Games began in 1896. They revived the ancient Greek tradition of holding an athletic competition every four years. Fittingly, the first modern Olympics took place in Athens, Greece, the country where the games had originated.

SECTION

4

ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- assembly line
- Charles Darwin
- theory of evolution
- radioactivity
- psychology
- mass culture

USING YOUR NOTES

2. Which breakthrough helped people the most? Why?



MAIN IDEAS

3. What effect did the assembly line have on production costs?
4. How did Joseph Lister improve the survival rate of his patients?
5. What effect did the spread of public education have on culture?

CRITICAL THINKING & WRITING

6. **COMPARING AND CONTRASTING** How is the mass culture that rose at the end of the 19th century similar to mass culture today? How is it different? Explain your response.
7. **RECOGNIZING EFFECTS** How did the germ theory change living conditions in Europe and the United States?
8. **ANALYZING CAUSES** What changes led to the rise of mass culture around 1900?
9. **WRITING ACTIVITY** **SCIENCE AND TECHNOLOGY** Write a two-paragraph **expository essay** in which you discuss whether advances in science and technology have had a largely positive or negative impact on society.

CONNECT TO TODAY MAKING A POSTER

Find information on the current state of medicines such as antibiotics and problems with their use and overuse. Create a **poster** that shows examples of current antibiotics, their benefits, and their potential negative long-term impact.

Chapter 26 Assessment

TERMS & NAMES

For each term or name below, briefly explain its connection to the reforms, crises, or advances of Western nations from 1815 to 1914.

1. suffrage
2. anti-Semitism
3. dominion
4. home rule
5. manifest destiny
6. Emancipation Proclamation
7. assembly line
8. theory of evolution

MAIN IDEAS

Democratic Reform and Activism Section 1 (pages 747–750)

9. What political reforms expanded democracy for men in Britain?
10. Why did the woman suffrage movement in Great Britain become more militant?

Self-Rule for British Colonies Section 2 (pages 751–757)

11. What cultural conflict caused problems for Canada?
12. How did Australia's early history differ from that of other British colonies?
13. Why did the British pass a home rule bill for southern Ireland only?

War and Expansion in the United States

Section 3 (pages 758–761)

14. In what ways did the United States gain territory in the 1800s?
15. Why was the issue of slavery in the United States so divisive?

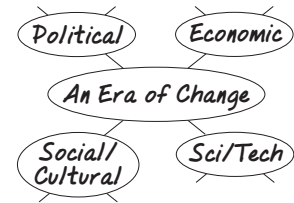
Nineteenth-Century Progress Section 4 (pages 762–767)

16. What was Darwin's principle of natural selection?
17. What prompted the growth of the social sciences?
18. What were some of the effects of increased leisure time?

CRITICAL THINKING

1. USING YOUR NOTES

Create a web diagram of the major political, economic, social and cultural, and scientific and technological changes of the 1800s and early 1900s.



2. RECOGNIZING EFFECTS

SCIENCE AND TECHNOLOGY For a worker, what might be the advantages and disadvantages of an assembly line?

3. ANALYZING MOTIVES

POWER AND AUTHORITY What effect did the call for home rule in British colonies have on Ireland's desire for independence?

4. HYPOTHESIZING

Imagine that circumstances had forced the North to surrender to the South in the Civil War, causing two countries to share the region now occupied by the United States. What economic effects might this have had on the North? the South? the region as a whole?

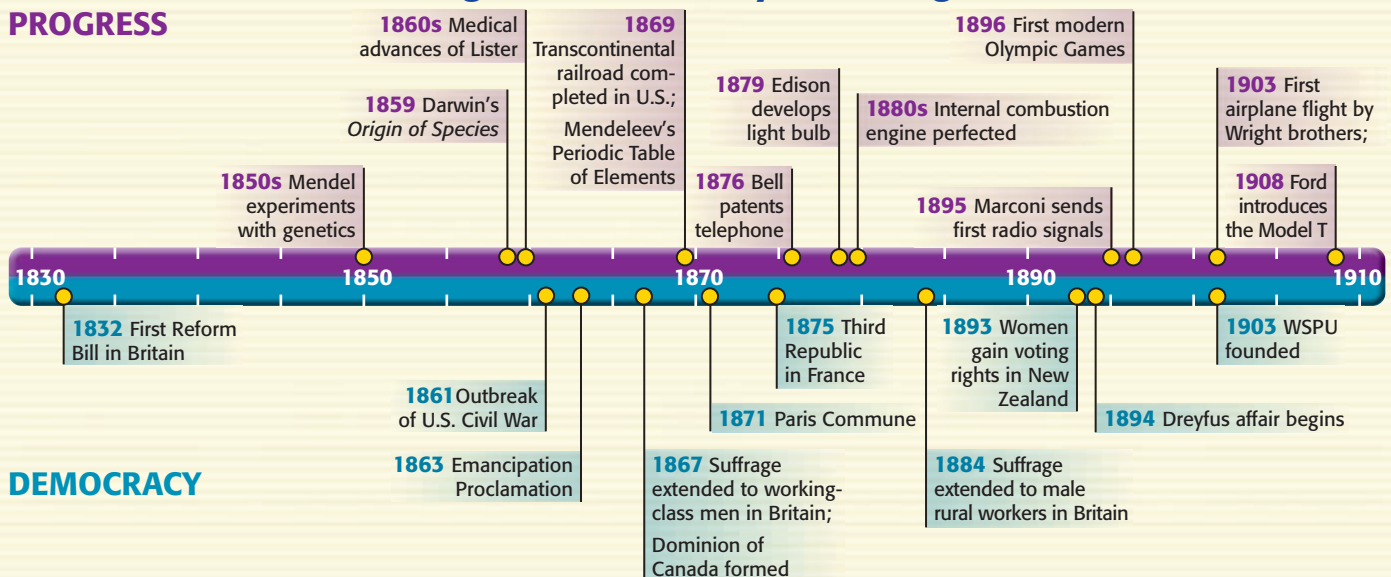
5. DRAWING CONCLUSIONS

How did manifest destiny help shape the U.S. government's policies of land acquisition?

VISUAL SUMMARY

An Age of Democracy and Progress

PROGRESS



DEMOCRACY

STANDARDS-BASED ASSESSMENT

Use the declaration from the Seneca Falls convention (held in New York) and your knowledge of world history to answer questions 1 and 2.

PRIMARY SOURCE

The history of mankind is a history of repeated injuries and usurpations on the part of man toward woman, having in direct object the establishment of an absolute tyranny over her. To prove this, let facts be submitted to a candid world.

He has never permitted her to exercise her inalienable right to the elective franchise.

He has compelled her to submit to laws, in the formation of which she had no voice.

THE SENECA FALLS CONVENTION, "Declaration of Sentiments"

1. The purpose of the Seneca Falls convention was to
 - A. call for an end to slavery.
 - B. call for the South to secede from the Union.
 - C. call for women's rights.
 - D. call for the release of Emmeline Pankhurst.
2. The style of this primary source is based on
 - A. the U.S. Constitution.
 - B. the U.S. Declaration of Independence.
 - C. the Reform Bill of 1832.
 - D. Émile Zola's *J'accuse!*



Use this cartoon (*A Court for King Cholera*) and your knowledge of world history to answer question 3.

3. Cholera is an infectious disease that has claimed many lives. What details does the artist show about what causes epidemic disease?
 - A. open windows and signs for travelers
 - B. children playing with a rat and a woman digging in trash
 - C. clothing hanging over the street
 - D. crowded street scene

 hmsocialstudies.com **TEST PRACTICE**

For additional test practice, go online for:

- Diagnostic tests
- Strategies
- Tutorials

Interact *with* History

On page 746, you considered what political ideals might be worth fighting and possibly even dying for. Now that you have read the chapter, reexamine your conclusions both in terms of the content of the chapter and your knowledge of events in the world today. Discuss your opinions with a small group. Consider:

- political ideals
- religious ideals
- family values

FOCUS ON WRITING

EMPIRE BUILDING Write an **editorial** that might have appeared in a newspaper in 19th-century New Zealand. In the editorial, address the issue of British settlers' taking land from the Maori, and the Maori response.

Consider the following:

- the original inhabitants of New Zealand
- means for negotiating land disputes
- balancing the rights of native peoples and new settlers

MULTIMEDIA ACTIVITY



NetExplorations: Mass Entertainment

Go to *NetExplorations* at hmsocialstudies.com to learn more about the rise of mass culture and mass entertainment. Then use the Internet and the material at *NetExplorations* to research and write a newspaper article about spectators at one of the new forms of mass entertainment. Include in your article quotes from fictional visitors and their reactions to actual events and spectacles. You may want to mention one or more of the following:

- the Boston Pilgrims' victory over the Pittsburgh Pirates in baseball's first World Series
- the "Luna" ride at Coney Island
- a late 19th-century European appearance of Barnum & Bailey's circus
- a visit to the Palace of Electricity at the 1904 World's Fair in St. Louis

Henry Ford

Henry Ford was a brilliant inventor and industrialist and founder of the Ford Motor Company. He helped bring about a time of rapid growth and progress that forever changed how people worked and lived. Henry Ford grew up on his family's farm near Dearborn, Michigan. As a child, he disliked life on the farm. He found the clicks and whirs of machinery much more exciting. When Ford

was 16, he went to nearby Detroit to work in a machine shop. From there, he turned his ideas for how to make affordable and well-built cars into one of the world's largest automobile companies.

Explore the amazing life and career of Henry Ford online. You can find a wealth of information, video clips, primary sources, activities, and more at hmsocialstudies.com.

"My 'gasoline buggy' was the first and for a long time the only automobile in Detroit. It was considered . . . a nuisance, for it made a racket and it scared horses."

— Henry Ford



My Life and Work

Read the document to learn more about Henry Ford's life and career in his own words.



CLICK THROUGH
INTER / ACTIVITIES

hmhsocialstudies.com



Big Plans

Watch the video to learn more about Henry Ford's early career.



Taking the Low Road

Watch the video to explore Henry Ford's vision for his car company.



The Assembly Line

Watch the video to see how Henry Ford used the assembly line to produce cars more efficiently and cheaply.

CHAPTER 27

The Age of Imperialism, 1850–1914

Essential Question

What changes resulted from European colonial expansion?



What You Will Learn

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

SECTION 1 The Scramble for Africa

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

SECTION 2 Case Study Imperialism: Nigeria

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

SECTION 3 Europeans Claim Muslim Lands

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

SECTION 4 British Imperialism in India

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

SECTION 5 Imperialism in Southeast Asia

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

Previewing Themes

EMPIRE BUILDING During the 19th and early 20th centuries, Western powers divided Africa and colonized large areas of Asia.

Geography Study the map and time line. How many countries colonized Africa? Which country controlled India? the Philippines?

POWER AND AUTHORITY At the Berlin Conference in 1884–1885, European nations established rules for the division of Africa with little concern about how their actions would affect the African people.

Geography Which two countries claimed most of Africa?

ECONOMICS Industrialization increased the need for raw materials and new markets. Western imperialists were driven by this need as they looked for colonies to acquire.

Geography Compare the size of the Western countries with the areas they colonized. Why were these Western powers interested in lands in Africa and Asia?

AFRICA
AND ASIA

1850

European trading with Africa becomes well established. (Asante brass sculpture) ▶



1869

Suez Canal opens.

1884–1885

Berlin Conference sets rules for African colonization.

1850

WORLD

1852

Napoleon III proclaims himself emperor of France. ▶



1875

1871

Bismarck completes unification of German Empire.



Colonial Claims, 1900



Dr. Livingstone, I Presume

hmsocialstudies.com VIDEO



1898
United States acquires Philippines, annexes Hawaii.

1899
Boer War begins in South Africa.



1914
Most of Africa is under European control.

1900

1925

1898
United States wins Spanish-American War.



1910
Mexican Revolution begins.

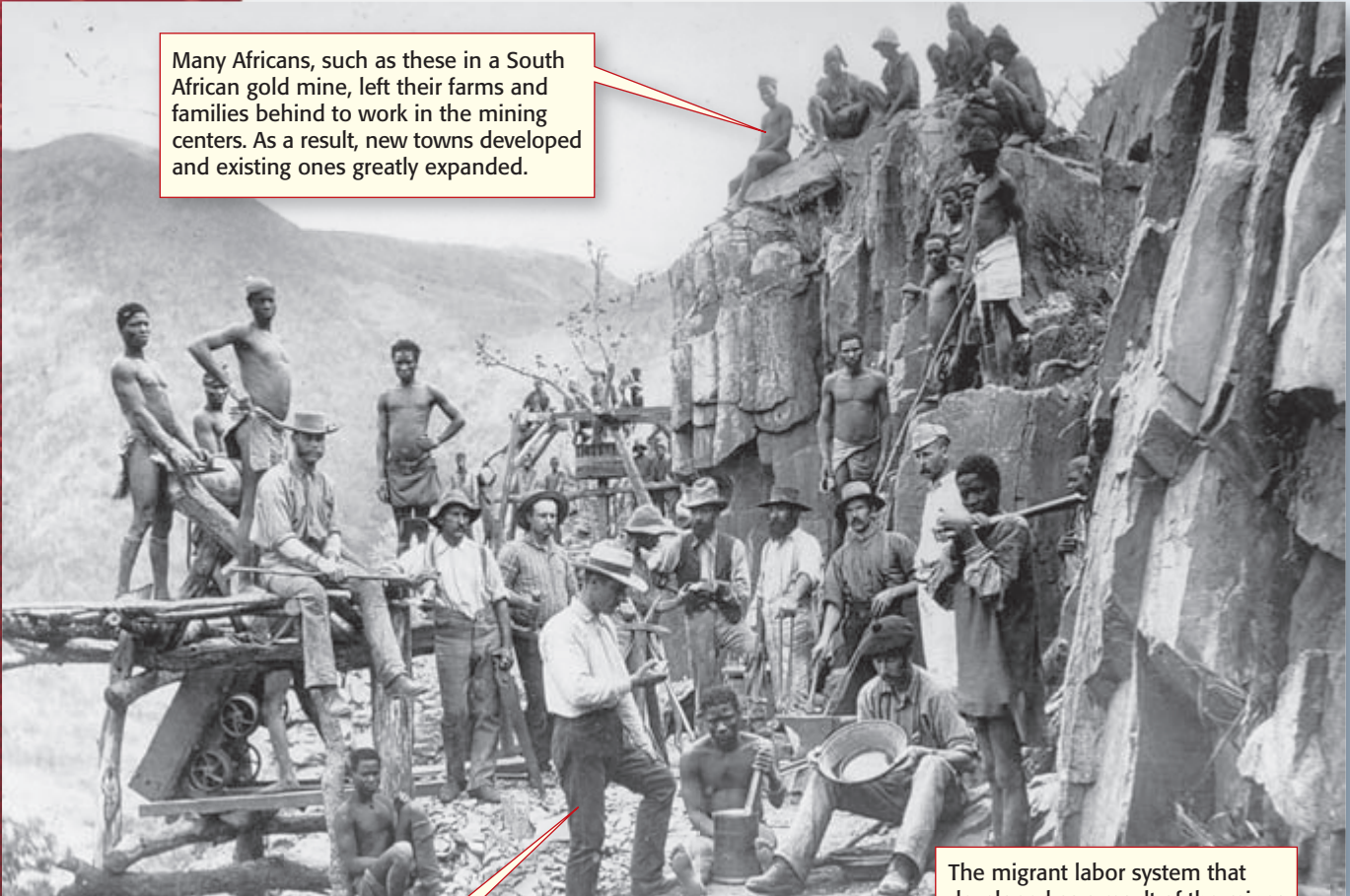
1914
World War I begins.

1918
World War I ends.

How would you react to the colonizers?

You are a young South African living in the 1880s. Gold and diamonds have recently been discovered in your country. The European colonizers need laborers to work the mines, such as the one shown below in an 1888 photograph. Along with thousands of other South Africans, you've left your farm and rural village to work for the colonizers. Separated from your family and living in a city for the first time, you don't know what to expect.

Many Africans, such as these in a South African gold mine, left their farms and families behind to work in the mining centers. As a result, new towns developed and existing ones greatly expanded.



The European owners built railways and roads to connect the mining centers, bridging the huge distances between villages and towns in South Africa.

The migrant labor system that developed as a result of the mines would have a great impact on South African society and culture.

EXAMINING *the* ISSUES

- **What advantages and disadvantages might colonizers bring?**
- **What does the photograph suggest about colonization?**

Discuss these questions with your classmates. In your discussion, remember what you have already learned about conquests and cultural interaction. As you read about imperialism in this chapter, look for its effects on both the colonizers and the colonized.

The Scramble for Africa

MAIN IDEA

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

WHY IT MATTERS NOW

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

TERMS & NAMES

- imperialism
- racism
- Social Darwinism
- Berlin Conference
- Shaka
- Boer
- Boer War

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

Africa Before European Domination

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

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

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

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

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



Use the graphic organizer online to take notes on the forces and events surrounding imperialism in Africa.



INTERACTIVE MAP

Follow the spread of European imperialism between 1850 and 1914.



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

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

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

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

Forces Driving Imperialism

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

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

Many Europeans believed that they were better than other peoples. The belief that one race is superior to others is called **racism**. The attitude was a reflection of **Social Darwinism**, a social theory of the time. In this theory, Charles Darwin's ideas about evolution and natural selection were applied to human society. Those who were fittest for survival enjoyed wealth and success and were considered superior to others. According to the theory, non-Europeans were considered to be on a lower scale of cultural and physical development because they had not made the scientific and technological progress that Europeans had. Europeans believed that they had the right and the duty to bring the results of their progress to other countries. Cecil Rhodes, a successful businessman and a major supporter of British expansion, clearly stated this position:

MAIN IDEA

Analyzing Primary Sources

A What attitude about the British does Rhodes's statement display?

PRIMARY SOURCE **A**

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

CECIL RHODES, *Confession of Faith*, 1877



▲ Rhodes's De Beers Consolidated Mines is the biggest diamond company in the world today.

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

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

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

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

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

The Division of Africa

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

Vocabulary

scramble: a frantic struggle to obtain something. The word is frequently used to describe the competition for African land.

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

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

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

MAIN IDEA

Clarifying

B What was the purpose of the Berlin Conference?

Three Groups Clash over South Africa

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

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

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

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

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





Imperialism in Africa, 1913

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INTERACTIVE MAP

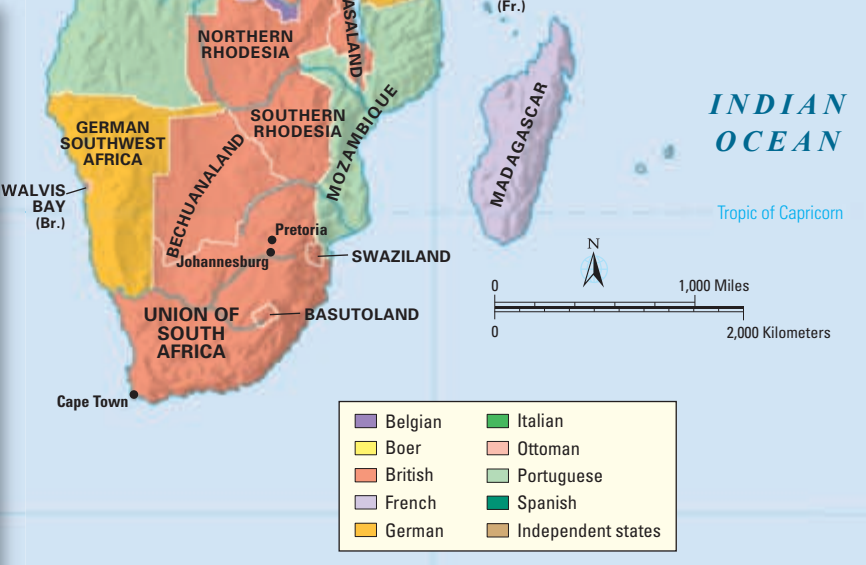
Traditional Ethnic Boundaries of Africa



ATLANTIC OCEAN

INDIAN OCEAN

Imperialism in Africa, 1878



GEOGRAPHY SKILLBUILDER: Interpreting Maps

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



Winston Churchill and the Boer War

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

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

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

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

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

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

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

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

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

MAIN IDEA

Contrasting

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

SECTION 1 ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- imperialism
- racism
- Social Darwinism
- Berlin Conference
- Shaka
- Boer
- Boer War

USING YOUR NOTES

2. How did Europeans use Social Darwinism to justify empire building?

The Scramble for Africa
 I. Africa Before European Domination
 A.
 B.
 II. Forces Driving Imperialism

MAIN IDEAS

3. Why did the Europeans control such a small portion of Africa in the 1800s?
4. What were some of the internal factors that contributed to imperialism in Africa?
5. Why did the Boers and the British fight over southern Africa?

CRITICAL THINKING & WRITING

6. **MAKING INFERENCES** What can you infer about the Europeans' attitude toward Africans from the Berlin Conference?
7. **FORMING OPINIONS** Why do you think Africans weren't interested in buying European products?
8. **DEVELOPING HISTORICAL PERSPECTIVE** What sort of problems might result from combining or splitting groups of people without regard for ethnic or linguistic traditions?
9. **WRITING ACTIVITY** **EMPIRE BUILDING** Write an **expository essay** explaining which European motive behind imperialism in Africa was the most powerful.

MULTIMEDIA ACTIVITY PREPARING AN ORAL REPORT



Use the Internet to find out about the population and status of Afrikaners, or Boers, in South Africa today. Present your findings in an **oral report**.

INTERNET KEYWORD
Afrikaners in South Africa

Imperialism

Case Study: Nigeria

MAIN IDEA

POWER AND AUTHORITY

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

WHY IT MATTERS NOW

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

TERMS & NAMES

- paternalism
- assimilation
- Menelik II

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

A New Period of Imperialism

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

Forms of Control Each European nation had certain policies and goals for establishing colonies. To establish control of an area, Europeans used different techniques. Over time, four forms of colonial control emerged: colony, protectorate, sphere of influence, and economic imperialism. These terms are defined and discussed in the chart on page 780. In practice, gaining control of an area might involve the use of several of these forms.

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

Indirect Control Indirect control relied on existing political rulers. In some areas, the British asked a local ruler to accept British authority to rule. These local officials handled much of the daily management of the colony. In addition,



Use the graphic organizer online to take notes on the forms and methods of European imperialism in Africa, the resistance it met with, and its impact.

Imperialism

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

Forms of Imperialism

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

Imperial Management Methods

Indirect Control	Direct Control
<ul style="list-style-type: none"> Local government officials used Limited self-rule Goal: to develop future leaders Government institutions are based on European styles but may have local rules. 	<ul style="list-style-type: none"> Foreign officials brought in to rule No self-rule Goal: assimilation Government institutions are based only on European styles.
<p>Examples:</p> <ul style="list-style-type: none"> British colonies such as Nigeria, India, Burma U.S. colonies on Pacific Islands 	<p>Examples:</p> <ul style="list-style-type: none"> French colonies such as Somaliland, Vietnam German colonies such as German East Africa Portuguese colonies such as Angola

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RESEARCH WEB LINKS Go online for more on imperialism.

> DATA FILE

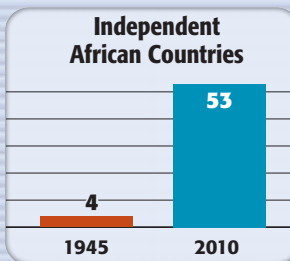
In 1905, the British Empire

- was the largest and most powerful in the world's history.
- covered about 11 million square miles.
- had about 400 million inhabitants.

Today, the United Kingdom has 13 small dependent territories and is the head of a voluntary association of 54 independent states.


African Colonization and Independence

- In 1884, Western leaders met to divide Africa into colonial holdings.
- By 1914, nearly all of Africa had been distributed among European powers.
- European imperial powers set national borders in Africa without regard for local ethnic or political divisions. This continues to be a problem for African nations today.



Connect to Today

1. Forming and Supporting Opinions Which form of managing imperial interests do you think would be most effective and why?

 See Skillbuilder Handbook, page R20.

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

each colony had a legislative council that included colonial officials as well as local merchants and professionals nominated by the colonial governor.

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

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

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

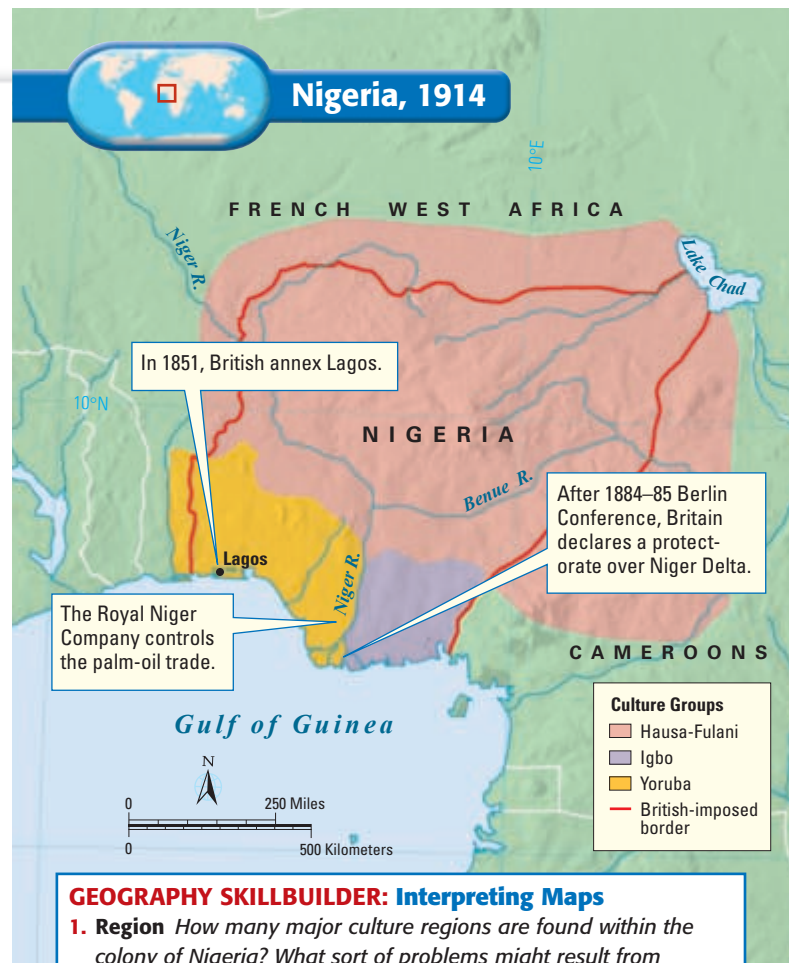
CASE STUDY: Nigeria

A British Colony

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

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

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



GEOGRAPHY SKILLBUILDER: Interpreting Maps

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

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

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

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

African Resistance

As in Nigeria, Africans across the continent resisted European attempts to colonize their lands. However, the contest between African states and European powers was never equal because of the Europeans' superior arms. Africans resisted the Europeans with whatever forces they could raise and often surprised the Europeans with their military ability. With the single exception of Ethiopia, though, all these attempts at resistance ultimately failed. Edward Morel, a British journalist who lived for a time in the Congo, made an observation about the Africans' dilemma:

History Makers

Samori Touré about 1830–1900

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

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

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

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INTERNET ACTIVITY Go online to research and draw a map showing the extent of the Mandingo Empire.

PRIMARY SOURCE

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

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

EDWARD MOREL, *The Black Man's Burden*

Unsuccessful Movements The unsuccessful resistance attempts included active military resistance and resistance through religious movements. Algeria's almost 50-year resistance to French rule was one outstanding example of active resistance. The resistance movement led by Samori Touré in West Africa against the French is another example. After modernizing his army, Touré fought the French for 16 years.

Africans in German East Africa put their faith in a spiritual defense. African villagers resisted the Germans' insistence that they plant cotton, a cash crop for export, rather than attend to their own food crops. In 1905, the belief suddenly arose that a magic water (*maji-maji*) sprinkled on

their bodies would turn the Germans' bullets into water. The uprising became known as the Maji Maji rebellion. Over 20 different ethnic groups united to fight for their freedom. The fighters believed that their war had been ordained by God and that their ancestors would return to life and assist their struggle.

MAIN IDEA

Summarizing

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

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

Ethiopia: A Successful Resistance Ethiopia was the only African nation that successfully resisted the Europeans. Its victory was due to one man—**Menelik II**. He became emperor of Ethiopia in 1889. He successfully played Italians, French, and British against each other, all of whom were striving to bring Ethiopia into their spheres of influence. In the meantime, he built up a large arsenal of modern weapons purchased from France and Russia. In 1889, shortly after Menelik had signed a treaty with Italy, he discovered differences between the wording of the treaty in the Ethiopian language and in Italian. Menelik believed he was giving up a tiny portion of Ethiopia. However, the Italians claimed all of Ethiopia as a protectorate. Meanwhile, Italian forces were advancing into northern Ethiopia. Menelik declared war. In 1896, in one of the greatest battles in the history of Africa—the Battle of Adowa—Ethiopian forces successfully defeated the Italians and kept their nation independent. After the battle, Menelik continued to stockpile rifles and other modern weapons in case another foreign power challenged Ethiopia’s liberty.

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



GEOGRAPHY SKILLBUILDER: Interpreting Maps

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

The Legacy of Colonial Rule

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

Negative Effects On the negative side, Africans lost control of their land and their independence. Many died of new diseases such as smallpox. They also lost thousands of their people in resisting the Europeans. Famines resulted from the change to cash crops in place of subsistence agriculture.

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

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

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

The patterns of behavior of imperialist powers were similar, no matter where their colonies were located. Dealing with local traditions and peoples continued to cause problems in other areas of the world dominated by Europeans. Resistance to the European imperialists also continued, as you will see in Section 3. **B**

MAIN IDEA

Drawing Conclusions

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

SECTION 2 ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- paternalism
- assimilation
- Menelik II

USING YOUR NOTES

2. Do you think the positive effects of imperialism outweighed the negative impact? Why or why not?



MAIN IDEAS

3. What idea is the policy of assimilation based on?
4. Why were African resistance movements usually unsuccessful?
5. How did colonial rule cause a breakdown in traditional African culture?

CRITICAL THINKING & WRITING

6. **FORMING OPINIONS** Do you think Europeans could have conquered Africa if the Industrial Revolution had never occurred? Explain your answer.
7. **COMPARING** How was the policy of paternalism like Social Darwinism?
8. **ANALYZING CAUSES** Why would the French and Russians sell arms to Ethiopia?
9. **WRITING ACTIVITY** **POWER AND AUTHORITY** Write a **speech** that you might deliver to colonial rulers, expressing your views on European imperialism in Africa.

CONNECT TO TODAY CREATING A POSTER

After gaining its independence from Portugal in 1975, Angola was plagued by civil war for 27 years. Research to learn what role the legacy of colonialism played in Angola's conflict. Summarize your findings on a **poster** using text, pictures, maps, and charts.

Views of Imperialism

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

A PRIMARY SOURCE

J. A. Hobson

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

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

B PRIMARY SOURCE

Dadabhai Naoroji

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

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

C PRIMARY SOURCE

Jules Ferry

The following is from a speech Ferry delivered before the French National Assembly on July 28, 1883.

Nations are great in our times only by means of the activities which they develop; it is not simply 'by the peaceful shining forth of institutions . . .' that they are great at this hour. . . . Something else is needed for France: . . . that she must also be a great country exercising all of her rightful influence over the destiny of Europe, that she ought to propagate this influence throughout the world and carry everywhere that she can her language, her customs, her flag, her arms, and her genius.

D PRIMARY SOURCE

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



Document-Based QUESTIONS

1. According to Hobson (Source A), what mistake did European imperialists make in Asia?
2. What position on imperialism does Jules Ferry take in Source C?
3. In Source D, what does the representation of England suggest about the cartoonist's view of British imperialism?
4. In what way does the view of imperialism in Source B contrast with that in Source D?

Europeans Claim Muslim Lands

MAIN IDEA

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

WHY IT MATTERS NOW

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

TERMS & NAMES

- geopolitics
- Crimean War
- Suez Canal

SETTING THE STAGE The European powers who carved up Africa also looked elsewhere for other lands to control. The Muslim lands that rimmed the Mediterranean had largely been claimed as a result of Arab and Ottoman conquests. As you learned in Chapter 18, the Ottoman Empire at its peak stretched from Hungary in the north, around the Black Sea, and across Egypt all the way west to the borders of Morocco. (See map opposite.) But during the empire's last 300 years, it had steadily declined in power. Europeans competed with each other to gain control of this strategically important area.

Ottoman Empire Loses Power

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

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

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

Europeans Grab Territory

Geopolitics, an interest in or taking of land for its strategic location or products, played an important role in the fate of the Ottoman Empire. World powers were attracted to its strategic location. The Ottomans controlled access to the Mediterranean and the Atlantic sea trade. Merchants in landlocked countries



Use the graphic organizer online to take notes on why Muslim states failed to keep European imperialists out of their lands.

that lay beyond the Black Sea had to go through Ottoman lands. Russia, for example, desperately wanted passage for its grain exports across the Black Sea and into the Mediterranean Sea. This desire strongly influenced Russia's relations with the Ottoman Empire. Russia attempted to win Ottoman favor, formed alliances with Ottoman enemies, and finally waged war against the Ottomans. Discovery of oil in Persia around 1900 and in the Arabian Peninsula after World War I focused even more attention on the area.

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

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

MAIN IDEA

Making Inferences

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



The Great Game For much of the 19th century, Great Britain and Russia engaged in yet another geopolitical struggle, this time over Muslim lands in Central Asia. Known as the “Great Game,” the war was waged over India, one of Britain’s most profitable colonies. Russia sought to extend its empire and gain access to India’s riches. Britain defended its colony and also attempted to spread its empire beyond India’s borders. Afghanistan, which lay between the Russian and British empires, became the center of their struggle. (See the map on page 771.)

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

Egypt Initiates Reforms

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

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

Military and Economic Reforms Modernization came to Egypt as a result of the interest in the area created by the French occupation. Egypt’s strategic location at the head of the Red Sea appeared valuable to France and Britain. After Napoleon failed to win Egypt, a new leader emerged: Muhammad Ali. The Ottomans sent him as part of an expeditionary force to govern Egypt, but he soon broke away

from Ottoman control. Beginning in 1831, he fought a series of battles in which he gained control of Syria and Arabia. Through the combined efforts of European powers, Muhammad Ali and his heirs were recognized as the hereditary rulers of Egypt.

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

The Suez Canal Muhammad Ali’s efforts to modernize Egypt were continued by his grandson, Isma’il. Isma’il supported the construction of the **Suez Canal**. The canal was a human-made waterway that cut

MAIN IDEA

Recognizing Effects

B What two effects did raising cotton have on Egyptian agriculture?



Suez Canal

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

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



GEOGRAPHY SKILLBUILDER:

Interpreting Maps

Place *Approximately how long is the Suez Canal?*



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

Persia Pressured to Change

Elsewhere in southwest Asia, Russia and Britain competed to exploit Persia commercially and to bring that country under their own spheres of influence. (See map on page 787.) Russia was especially interested in gaining access to the Persian Gulf and the Indian Ocean. Twice Persia gave up territories to Russia, after military defeats in 1813 and 1828. Britain was interested in using Afghanistan as a buffer between India and Russia. In 1857, Persia resisted British demands but was forced to give up all claims to Afghanistan. Britain's interest in Persia increased greatly after the discovery of oil there in 1908.

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



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

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

PRIMARY SOURCE

He has sold to the foes of our Faith the greater part of the Persian lands and the profits derived from them, for example . . . tobacco, with the chief centers of its cultivation, the lands on which it is grown and the warehouses, carriers, and sellers, wherever these are found. . . .

In short, this criminal has offered the provinces of Persia to auction among the Powers, and is selling the realms of Islam and the abodes of Muhammad and his household to foreigners.

JAMAL AL-DIN AL-AFGHANI, in a letter to Hasan Shirazi, April 1891

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

In the Muslim lands, many European imperialists gained control by using economic imperialism and creating spheres of influence. Although some governments made attempts to modernize their nations, in most cases it was too little too late. In other areas of the globe, imperialists provided the modernization. India, for example, became a colony that experienced enormous change as a result of the occupation of the imperialist British. You will learn about India in Section 4.

MAIN IDEA

Analyzing Primary Sources

Why did al-Afghani condemn the actions of the Persian ruler?

SECTION 3 ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- geopolitics
- Crimean War
- Suez Canal

USING YOUR NOTES

2. What imperialistic forms of control did the Europeans use to govern these lands?

Muslim states failed to keep European imperialists out of their lands.

detail detail detail

MAIN IDEAS

3. What is geopolitics?
4. Why did Great Britain want to control the Suez Canal?
5. Why did the Persian people oppose their ruler's policy of selling business concessions to Europeans?

CRITICAL THINKING & WRITING

6. **COMPARING AND CONTRASTING** How were the reactions of African and Muslim rulers to imperialism similar? How were they different?
7. **MAKING PREDICTIONS** What do you think happened as a result of Muhammad Ali's agriculture reform?
8. **ANALYZING BIAS** What does the quotation in the History in Depth on page 789 suggest about Joseph Chamberlain's view of British imperialism in Africa?
9. **WRITING ACTIVITY** **EMPIRE BUILDING** Write a **cause-and-effect paragraph** about reform efforts undertaken in Muslim lands.

CONNECT TO TODAY CREATING A TIME LINE

Iran (formerly Persia) has undergone many changes since the late 1800s. Create a **time line** of important events in Iran's modern history. Include photographs that illustrate the events.

British Imperialism in India

MAIN IDEA

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

WHY IT MATTERS NOW

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

TERMS & NAMES

- sepoy
- “jewel in the crown”
- Sepoy Mutiny
- Raj

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

British Expand Control over India

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

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

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

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

▼ A sepoy in uniform



Use the graphic organizer online to take notes on the effects of the Mughal Empire’s decline, colonial policies, and the Sepoy Mutiny.

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

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

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

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

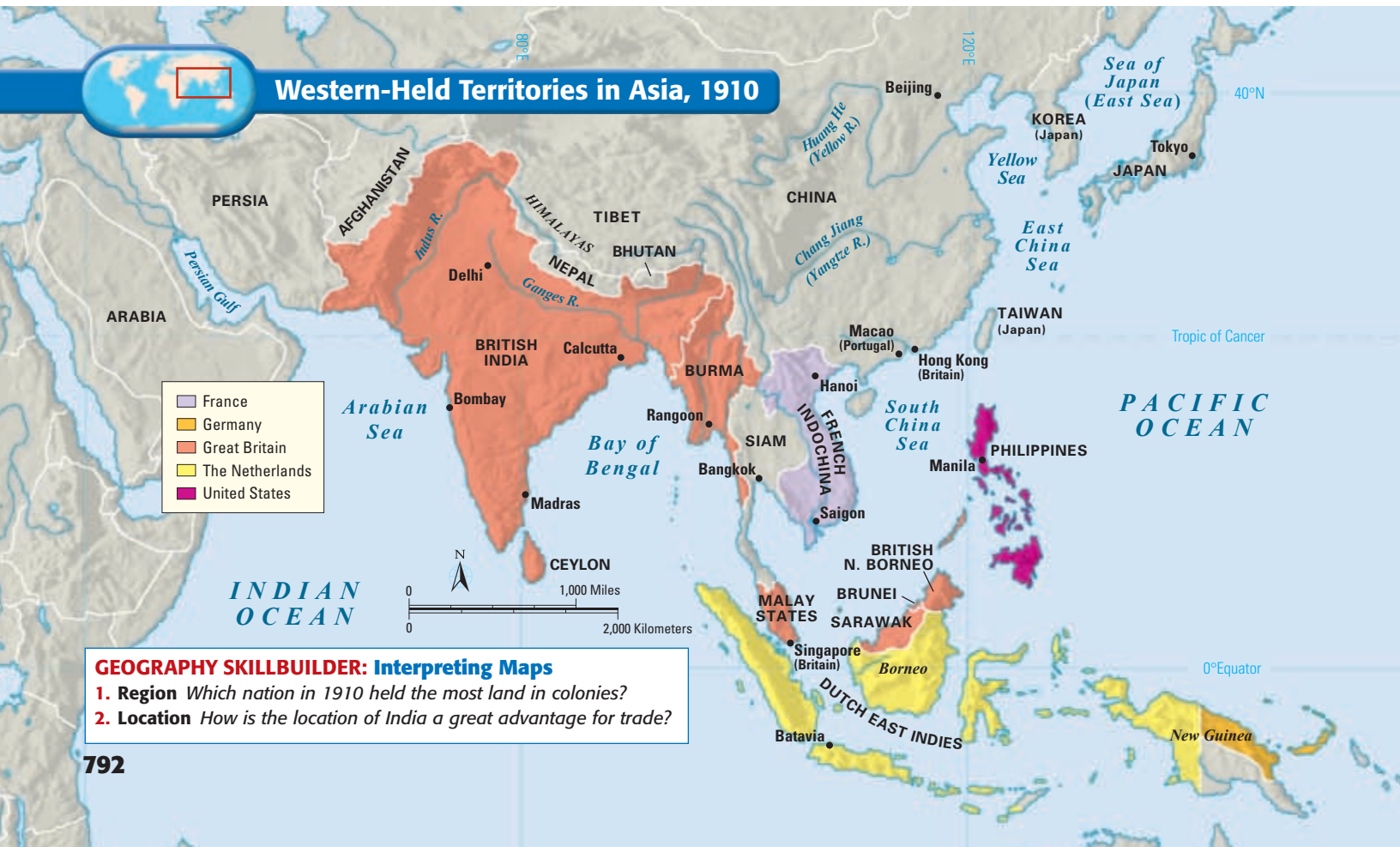
Vocabulary

jute: a fiber used for sacks and cord

MAIN IDEA

Summarizing

A On which continents were Indian goods being traded?



GEOGRAPHY SKILLBUILDER: Interpreting Maps

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

Social History

Social Class in India

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

British Army

Social class determined the way of life for the British Army in India. Upper-class men served as officers. Lower-class British served at lesser rank and did not advance past the rank of sergeant. Only men with the rank of sergeant and above were allowed to bring their wives to India.

Each English officer's wife attempted to re-create England in the home setting. Like a general, she directed an army of 20 to 30 servants.

Indian Servants

Caste determined Indian occupations. Castes were divided into four broad categories called varna. Indian civil servants were of the third varna. House and personal servants were of the fourth varna.

Even within the varna, jobs were strictly regulated, which is why such large servant staffs were required. For example, in the picture here, both servants were of the same varna. Although the two servants were from the same varna, they had different jobs.



The Sepoy Mutiny

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

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

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

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

The Indians could not unite against the British due to weak leadership and serious splits between Hindus and Muslims. Hindus did not want the Muslim Mughal Empire restored. Indeed, many Hindus preferred British rule to Muslim rule. Most of the princes and maharajahs who had made alliances with the East India

MAIN IDEA

Recognizing Effects

B Look back at Elphinstone's comment on page 791. Did the Sepoy Mutiny prove him correct?

Company did not take part in the rebellion. The Sikhs, a religious group that had been hostile to the Mughals, also remained loyal to the British. Indeed, from then on, the bearded and turbaned Sikhs became the mainstay of Britain's army in India.

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

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

The Sepoy Mutiny fueled the racist attitudes of the British. The British attitude is illustrated in the following quote by Lord Kitchener, British commander in chief of the army in India:

PRIMARY SOURCE

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

LORD KITCHENER, quoted in K. M. Panikkar, *Asia and Western Dominance*

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

MAIN IDEA

Recognizing Effects

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

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



Nationalism Surfaces in India

In the early 1800s, some Indians began demanding more modernization and a greater role in governing themselves. Ram Mohun Roy, a modern-thinking, well-educated Indian, began a campaign to move India away from traditional practices and ideas. Ram Mohun Roy saw arranged child marriages and the rigid caste separation as parts of Indian life that needed to be changed. He believed that if the practices were not changed, India would continue to be controlled by outsiders. Roy's writings inspired other Indian reformers to call for adoption of Western ways. Roy also founded a social reform movement that worked for change in India.

Besides modernization and Westernization, nationalist feelings started to surface in India. Indians hated a system that made them second-class citizens in their own country. They were barred from top posts in the Indian Civil Service. Those who managed to get middle-level jobs were paid less than Europeans. A British engineer on the East India Railway, for example, made nearly 20 times as much money as an Indian engineer.

Nationalist Groups Form This growing nationalism led to the founding of two nationalist groups, the Indian National Congress in 1885 and the Muslim League in 1906. At first, such groups concentrated on specific concerns for Indians. By the early 1900s, however, they were calling for self-government.

The nationalists were further inflamed in 1905 by the partition of Bengal. The province was too large for administrative purposes, so the British divided it into a Hindu section and a Muslim section. Keeping the two religious groups apart made it difficult for them to unite in calling for independence. In 1911, the British took back the order and divided the province in a different way. **D**

Conflict over the control of India continued to develop between the Indians and the British in the following years. Elsewhere in Southeast Asia, the same struggles for control of land took place between local groups and the major European powers that dominated them. You will learn about them in Section 5.

MAIN IDEA

Analyzing Motives

D Why would the British think that dividing the Hindus and Muslims into separate sections would be good?

SECTION

4

ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- sepoy
- "jewel in the crown"
- Sepoy Mutiny
- Raj

USING YOUR NOTES

2. Which of the effects you listed later became causes?

Cause	Effect
1. Decline of the Mughal Empire	
2. Colonial policies	
3. Sepoy Mutiny	

MAIN IDEAS

3. Why did Britain consider India its "jewel in the crown"?
4. Why didn't Indians unite against the British in the Sepoy Mutiny?
5. What form did British rule take under the Raj?

CRITICAL THINKING & WRITING

6. **MAKING INFERENCES** How did economic imperialism lead to India's becoming a British colony?
7. **EVALUATING DECISIONS** What might the decision to grease the sepoys' cartridges with beef and pork fat reveal about the British attitude toward Indians?
8. **SYNTHESIZING** How did imperialism contribute to unity and to the growth of nationalism in India?
9. **WRITING ACTIVITY** **EMPIRE BUILDING** Write an **editorial** to an underground Indian newspaper, detailing grievances against the British and calling for self-government.

CONNECT TO TODAY CREATING A POLITICAL CARTOON

In 1947, India was divided into two countries: mostly Hindu India and mostly Muslim Pakistan. However, the two countries maintain a tense relationship today. Research to learn about the cause of this tension and illustrate it in a **political cartoon**.

Imperialism in Southeast Asia

MAIN IDEA

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

WHY IT MATTERS NOW

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

TERMS & NAMES

- Pacific Rim
- King Mongkut
- Emilio Aguinaldo
- annexation
- Queen Liliuokalani

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

European Powers Invade the Pacific Rim

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

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

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

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



Use the graphic organizer online to take notes on one of the Western powers discussed in this section and the areas it controlled.

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

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

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

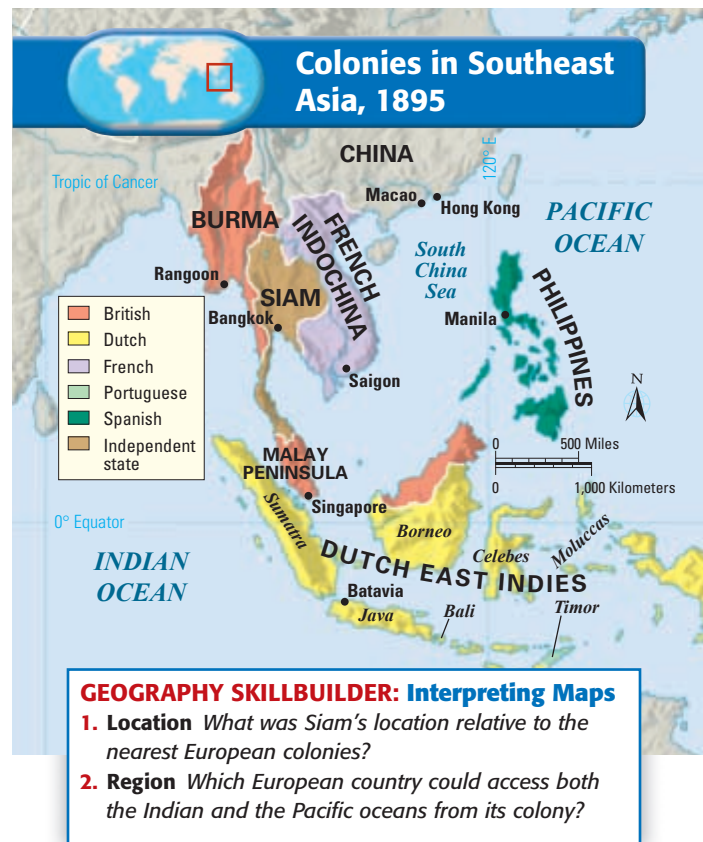
Using direct colonial management, the French themselves filled all important positions in the government bureaucracy. They did not encourage local industry. Four times as much land was devoted to rice production. However, the peasants' consumption of rice decreased because much of the rice was exported.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

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

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

Siam Remains Independent

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



MAIN IDEA

Analyzing Motives

A Why do you think so many Chinese moved to Malaysia?

GEOGRAPHY SKILLBUILDER: Interpreting Maps

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

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

PRIMARY SOURCE

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

KING CHULALONGKORN, "Royal Proclamation in Education"

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

U.S. Imperialism in the Pacific Islands

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

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

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

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

Hawaii Becomes a Republic U.S. interest in Hawaii began around the 1790s when Hawaii was a port on the way to China and East India. Beginning about the 1820s, sugar trade began to change the Hawaiian economy. Americans established sugar-cane plantations and became highly successful. By the mid-19th century, American sugar plantations accounted for 75 percent of Hawaii's wealth. At the same time, American sugar planters also gained great political power in Hawaii.

▼ This photograph shows American soldiers fighting the Filipino nationalists in the early years of the war.



Vocabulary

Filipino: an inhabitant of the Philippine Islands

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

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

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

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



VIDEO

Conquest of Hawaii

[hmhsocialstudies.com](https://www.hmhsocialstudies.com)

History Makers



Queen Liliuokalani 1838–1917

Liliuokalani was Hawaii's only queen and the last monarch of Hawaii. She bitterly regretted her brother's loss of power to American planters and worked to regain power for the Hawaiian monarchy. As queen, she refused to renew a treaty signed

by her brother that would have given commercial privileges to foreign businessmen. It was a decision that would cost her the crown.

[hmhsocialstudies.com](https://www.hmhsocialstudies.com)

RESEARCH WEB LINKS Go online for more on Queen Liliuokalani.

SECTION

5

ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- Pacific Rim
- King Mongkut
- Emilio Aguinaldo
- annexation
- Queen Liliuokalani

USING YOUR NOTES

2. Which Western power do you think had the most negative impact on its colonies?



MAIN IDEAS

3. How were the Dutch East India Trading Company and the British East India Company similar?
4. What changes took place in Southeast Asia as a result of colonial control?
5. Why did some groups believe that the United States should colonize like the Europeans?

CRITICAL THINKING & WRITING

6. **DRAWING CONCLUSIONS** How did the reforms of the Siamese kings help Siam remain independent?
7. **ANALYZING BIAS** What does President McKinley's desire to "uplift and Christianize" the Filipinos suggest about his perception of the people?
8. **ANALYZING MOTIVES** Why do you think Sanford Dole wanted the United States to annex Hawaii?
9. **WRITING ACTIVITY** **ECONOMICS** Compose a **letter to the editor** expressing a Hawaiian's view on the U.S. businessmen who pushed for the annexation of Hawaii for economic gain.

CONNECT TO TODAY **DRAWING A BAR GRAPH**

Research to find out about the economic situation of Southeast Asian countries today. Rank the economies and present your findings in a **bar graph**.

Chapter 27 Assessment

TERMS & NAMES

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

1. imperialism
2. racism
3. Berlin Conference
4. Menelik II
5. geopolitics
6. Suez Canal
7. Raj
8. Queen Liliuokalani

MAIN IDEAS

The Scramble for Africa Section 1 (pages 773–778)

9. What motivated the nations of Europe to engage in imperialist activities?
10. What effect did the Boer War have on Africans?

Case Study: Imperialism Section 2 (pages 779–785)

11. What are the forms of imperial rule?
12. How did Ethiopia successfully resist European rule?

Europeans Claim Muslim Lands Section 3 (pages 786–790)

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

British Imperialism in India Section 4 (pages 791–795)

15. How was the economy of India transformed by the British?
16. What caused the Sepoy Mutiny?

Imperialism in Southeast Asia Section 5 (pages 796–799)

17. How did Siam manage to remain independent while other countries in the area were being colonized?
18. Describe American attitudes toward colonizing other lands.

CRITICAL THINKING

1. USING YOUR NOTES

In a chart, tell how the local people resisted the demands of the Europeans.

Africa	Muslim lands	India	Southeast Asia

2. RECOGNIZING EFFECTS

ECONOMICS What effects did imperialism have on the economic life of the lands and people colonized by the European imperialists?

3. DRAWING CONCLUSIONS

Why do you think the British viewed the Suez Canal as the lifeline of their empire?

4. SYNTHESIZING

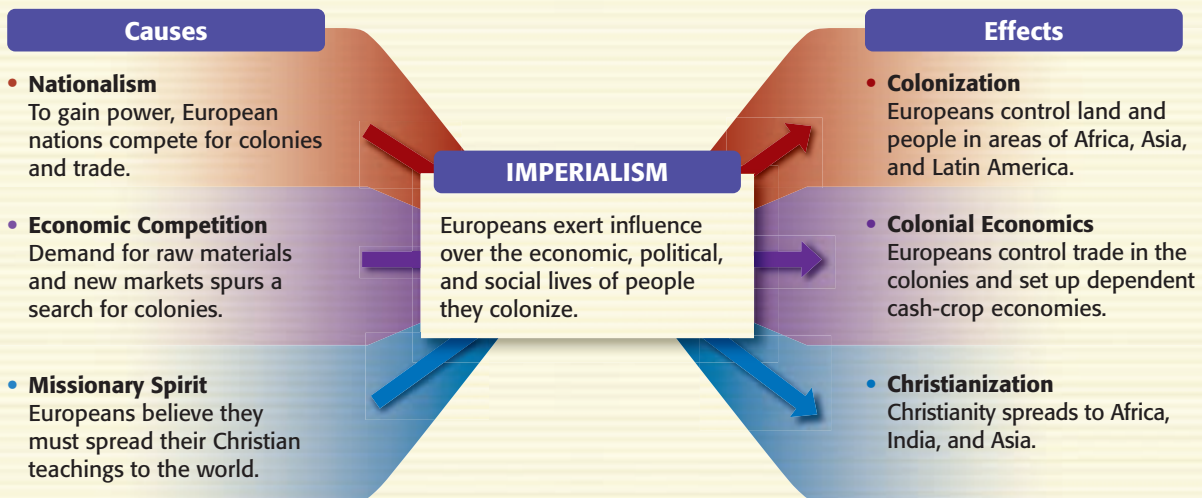
What positive and negative impact did inventions such as the railroad and the steamship have on the land and people conquered by the imperialists?

5. DEVELOPING HISTORICAL PERSPECTIVE

EMPIRE BUILDING What economic, political, and social conditions encouraged the growth of imperialism in Africa and Asia?

VISUAL SUMMARY

The New Imperialism, 1850–1914



STANDARDS-BASED ASSESSMENT

Use the quotation from the king of the Asante people and your knowledge of world history to answer questions 1 and 2.

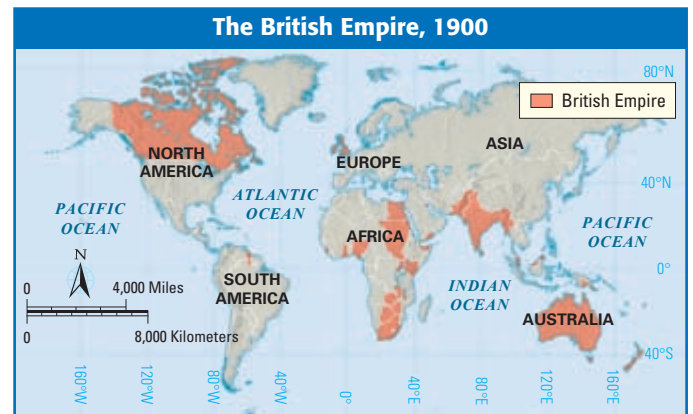
PRIMARY SOURCE

The suggestion that Ashanti [Asante] in its present state should come and enjoy the protection of Her Majesty the Queen and Empress of India, I may say this is a matter of serious consideration, and which I am happy to say we have arrived at the conclusion, that my kingdom of Ashanti will never commit itself to any such conclusion, that Ashanti must remain independent as of old, at the same time to remain friendly with all white men. I do not write this with a boastful spirit, but in the clear sense of its meaning. Ashanti is an independent kingdom.

KWAKU DUA III to Frederic M. Hodgson, December 27, 1889

1. What is Kwaku Dua III's answer to the queen?
 - A. He would enjoy the protection of the queen.
 - B. He cannot commit himself at this time.
 - C. He is offended by her offer.
 - D. He refuses her offer.
2. Why do you think Kwaku Dua III responded that he wanted to remain friendly to white men?
 - A. He wanted his country to be placed under the protection of white men.
 - B. He was trying to be diplomatic.
 - C. He wanted to adopt white men's culture.
 - D. He wanted the assistance of white men.

Use the map of the British Empire and your knowledge of world history to answer question 3.



3. "The sun never sets on the British Empire" was a saying about the British Empire at the peak of its power. What do you think this saying meant?
 - A. The British Empire had colonies in every part of the world.
 - B. The British felt that the sun revolved around them.
 - C. The British Empire represented sunlight and hope to the rest of the world.
 - D. The British were hard working and never slept.

hmhsocialstudies.com **TEST PRACTICE**

For additional test practice, go online for:

- Diagnostic tests
- Strategies
- Tutorials

Interact *with* History

On page 772, you considered the advantages and disadvantages of colonialism. Now, make a chart showing the advantages and disadvantages to a local person living in a place that became a European colony. Next, make a similar chart for a European living in a foreign place. How do they compare? Discuss with members of your class a way to decide whether the advantages outweigh the disadvantages for each group.

FOCUS ON WRITING

POWER AND AUTHORITY Write a **news article** about the effects of colonization. Be sure to address the following points:

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

MULTIMEDIA ACTIVITY



Creating an Interactive Time Line

Use the Internet and your textbook to create a time line of the events covered in Chapter 27. The time line on pages 770–771 can serve as a guide. Use graphics software to add maps and pictures that illustrate the events. Be sure to include the following on your time line:

- important events in the colonization of Africa and Asia
- efforts on the part of the colonies to resist the imperialist powers
- people who played important roles in the events
- places where key events occurred
- visuals that illustrate the events

Transformations Around the Globe, 1800–1914

Essential Question

What impact did imperialism, economic instability, and revolution have on developing nations?



What You Will Learn

In this chapter you will learn how China and Japan responded to the European powers. You will also learn about U.S. influence on Latin America and the Mexican Revolution.

SECTION 1 China Resists Outside Influence

Main Idea Western economic pressure forced China to open to foreign trade and influence.

SECTION 2 Modernization in Japan

Main Idea Japan followed the model of Western powers by industrializing and expanding its foreign influence.

SECTION 3 U.S. Economic Imperialism

Main Idea The United States put increasing economic and political pressure on Latin America during the 19th century.

SECTION 4 Turmoil and Change in Mexico

Main Idea Political, economic, and social inequalities in Mexico triggered a period of revolution and reform.

Previewing Themes

EMPIRE BUILDING During the 19th and early 20th centuries, Great Britain, other European nations, the United States, and Japan sought political and economic influence over other countries.

Geography *What foreign powers were involved in China in the late 1800s?*

CULTURAL INTERACTION Imperialism brought new religions, philosophies, and technological innovations to East Asia and Latin America. People in these areas resisted some Western ideas and adopted or adapted others.

Geography *What geographic factors might explain why certain parts of China were under Japanese, Russian, and French influence?*

REVOLUTION Both China and Japan struggled to deal with foreign influence and to modernize. Mexico underwent a revolution that brought political and economic reforms.

Geography *Japan built up its navy as a step toward modernization. Why do you think Japan wanted a strong navy?*

EAST ASIA AND LATIN AMERICA

WORLD

1800

1815
Congress of Vienna
creates a new balance
of power in Europe.

1823
Monroe Doctrine
reflects special U.S.
interest in Americas.

1825

1839
China and
Britain clash in
Opium War.



1853
Commodore
Perry enters
Tokyo harbor.

1850

1858
Great Britain
establishes direct
control of India.



Colonial Powers Carve Up China, 1850 – 1910

hmhsocialstudies.com INTERACTIVE MAP



HISTORY

China: Boxer Uprising

hmhsocialstudies.com VIDEO

1869 Suez Canal opens.

1875

1898 United States wins Spanish-American War. (Teddy Roosevelt)

1901 Australia becomes an independent nation. (British flag showing countries of the Empire)

1905 Russian soldiers open fire on protesting workers in St. Petersburg.

1910 Mexican Revolution begins.

1914 Panama Canal opens.

1925

Why might you seek out or resist foreign influence?

You are a local government official in 19th-century China. You are proud of your country, which produces everything that its people need. Like other Chinese officials, you discourage contact with foreigners. Nevertheless, people from the West are eager to trade with China.

Most foreign products are inferior to Chinese goods. However, a few foreign products are not available in China. You are curious about these items. At the same time, you wonder why foreigners are so eager to trade with China and what they hope to gain.



▲ Finely made lanterns were among the Chinese goods favored by Western merchants.

EXAMINING *the* ISSUES

- **How might foreign products affect the quality of life in China both positively and negatively?**
- **What demands might foreigners make on countries they trade with?**

As a class, discuss these questions. Recall what happened in other parts of the world when different cultures came into contact for the first time. As you read this chapter, compare the decisions various governments made about foreign trade and the reasons they made those decisions.

China Resists Outside Influence

MAIN IDEA

CULTURAL INTERACTION
Western economic pressure forced China to open to foreign trade and influence.

WHY IT MATTERS NOW

China has become an increasingly important member of the global community.

TERMS & NAMES

- Opium War
- extraterritorial rights
- Taiping Rebellion
- sphere of influence
- Open Door Policy
- Boxer Rebellion

SETTING THE STAGE Out of pride in their ancient culture, the Chinese looked down on all foreigners. In 1793, however, the Qing emperor agreed to receive an ambassador from England. The Englishman brought gifts of the West’s most advanced technology—clocks, globes, musical instruments, and even a hot-air balloon. The emperor was not impressed. In a letter to England’s King George III, he stated that the Chinese already had everything they needed. They were not interested in the “strange objects” and gadgets that the West was offering them.

China and the West

China was able to reject these offers from the West because it was largely self-sufficient. The basis of this self-sufficiency was China’s healthy agricultural economy. During the 11th century, China had acquired a quick-growing strain of rice from Southeast Asia. By the time of the Qing Dynasty, the rice was being grown throughout the southern part of the country. Around the same time, the 17th and 18th centuries, Spanish and Portuguese traders brought maize, sweet potatoes, and peanuts from the Americas. These crops helped China increase the productivity of its land and more effectively feed its huge population.

China also had extensive mining and manufacturing industries. Rich salt, tin, silver, and iron mines produced great quantities of ore. The mines provided work for tens of thousands of people. The Chinese also produced beautiful silks, high-quality cottons, and fine porcelain.

The Tea-Opium Connection Because of their self-sufficiency, the Chinese had little interest in trading with the West. For decades, the only place they would allow foreigners to do business was at the southern port of Guangzhou (gwahnng•joh). And the balance of trade at Guangzhou was clearly in China’s favor. This means that China earned much more for its exports than it spent on imports.

European merchants were determined to find a product the Chinese would buy in large quantities. Eventually they found one—opium. Opium is a habit-forming narcotic made from the poppy plant. Chinese doctors had been using it to relieve pain for hundreds of years. In the late 18th century, however, British merchants smuggled opium into China for nonmedical use. It took a few decades for opium smoking to catch on, but by 1835, as many as 12 million Chinese people were addicted to the drug.



Use the graphic organizer online to take notes on the internal and external problems faced by China in the 1800s and early 1900s.

War Breaks Out This growing supply of opium caused great problems for China. The Qing emperor was angry about the situation. In 1839, one of his highest advisers wrote a letter to England’s Queen Victoria about the problem:

PRIMARY SOURCE

By what right do they [British merchants] . . . use the poisonous drug to injure the Chinese people? . . . I have heard that the smoking of opium is very strictly forbidden by your country; that is because the harm caused by opium is clearly understood. Since it is not permitted to do harm to your own country, then even less should you let it be passed on to the harm of other countries.

LIN ZEXU, quoted in *China’s Response to the West*

The pleas went unanswered, and Britain refused to stop trading opium. The result was an open clash between the British and the Chinese—the **Opium War** of 1839. The battles took place mostly at sea. China’s outdated ships were no match for Britain’s steam-powered gunboats. As a result, the Chinese suffered a humiliating defeat. In 1842, they signed a peace treaty, the Treaty of Nanjing. **A**

This treaty gave Britain the island of Hong Kong. After signing another treaty in 1844, U.S. and other foreign citizens also gained **extraterritorial rights**. Under these rights, foreigners were not subject to Chinese law at Guangzhou and four other Chinese ports. Many Chinese greatly resented the foreigners and the bustling trade in opium they conducted.

MAIN IDEA

Analyzing Issues

A What conflicting British and Chinese positions led to the Opium War?

Growing Internal Problems

Foreigners were not the greatest of China’s problems in the mid-19th century, however. The country’s own population provided an overwhelming challenge. The number of Chinese grew to 430 million by 1850, a 30 percent gain in only 60 years. Yet, in the same period of time, food production barely increased. As a result, hunger was widespread, even in good years. Many people became discouraged, and opium addiction rose steadily. As their problems mounted, the Chinese began to rebel against the Qing Dynasty.

Connect to Today

Special Economic Zones

Today, as in the late 1800s, the Chinese government limits foreign economic activity to particular areas of the country. Most of these areas, called special economic zones (SEZs), are located on the coast and waterways of southeastern China. First established in the late 1970s, the SEZs are designed to attract, but also control, foreign investment.

One of the most successful SEZs is Shanghai (pictured at right). By 2006, dozens of foreign companies—including IBM of the United States, Hitachi of Japan, Siemens of Germany, and Unilever of Great Britain—had invested over \$73 billion in the building and operating of factories, stores, and other businesses. This investment had a huge impact. Shanghai’s per capita GDP grew from around \$1200 in 1990 to over \$6000 in 2006.



The Taiping Rebellion During the late 1830s, Hong Xiuquan (hung shee•oo•choo•ahn), a young man from Guangdong province in southern China, began recruiting followers to help him build a “Heavenly Kingdom of Great Peace.” In this kingdom, all Chinese people would share China’s vast wealth and no one would live in poverty. Hong’s movement was called the **Taiping Rebellion**, from the Chinese word *taiping*, meaning “great peace.”

By the 1850s, Hong had organized a massive peasant army of some one million people. Over time, the Taiping army took control of large areas of southeastern China. Then, in 1853, Hong captured the city of Nanjing and declared it his capital. Hong soon withdrew from everyday life and left family members and his trusted lieutenants in charge of the government of his kingdom.

The leaders of the Taiping government, however, constantly feuded among themselves. Also, Qing imperial troops and British and French forces all launched attacks against the Taiping. By 1864, this combination of internal fighting and outside assaults had brought down the Taiping government. But China paid a terrible price. At least 20 million—and possibly twice that many—people died in the rebellion. **B**



▲ A Taiping force surrounds and destroys an enemy village.

MAIN IDEA

Recognizing Effects

B What were the results of the Taiping Rebellion?

Foreign Influence Grows

The Taiping Rebellion and several other smaller uprisings put tremendous internal pressure on the Chinese government. And, despite the Treaty of Nanjing, external pressure from foreign powers was increasing. At the Qing court, stormy debates raged about how best to deal with these issues. Some government leaders called for reforms patterned on Western ways. Others, however, clung to traditional ways and accepted change very reluctantly.

Resistance to Change During the last half of the 19th century, one person was in command at the Qing imperial palace. The Dowager Empress Cixi (tsoo•shee) held the reins of power in China from 1862 until 1908 with only one brief gap. Although she was committed to traditional values, the Dowager Empress did support certain reforms. In the 1860s, for example, she backed the self-strengthening movement. This program aimed to update China’s educational system, diplomatic service, and military. Under this program, China set up factories to manufacture steam-powered gunboats, rifles, and ammunition. The self-strengthening movement had mixed results, however.

Other Nations Step In Other countries were well aware of China’s continuing problems. Throughout the late 19th century, many foreign nations took advantage of the situation and attacked China. Treaty negotiations after each conflict gave these nations increasing control over China’s economy. Many of Europe’s major powers and Japan gained a strong foothold in China. This foothold, or **sphere of influence**, was an area in which the foreign nation controlled trade and investment. (See the map on page 808.)

The United States was a long-time trading partner with China. Americans worried that other nations would soon divide China into formal colonies and shut out American traders. To prevent this occurrence, in 1899 the United States declared

Vocabulary

A *dowager* is a widow who holds a title or property from her deceased husband.

China: Spheres of Influence and Treaty Ports, c. 1900



GEOGRAPHY SKILLBUILDER: Interpreting Maps

- 1. Human-Environment Interaction** Which countries had spheres of influence in China?
- 2. Location** What foreign power shown on the map had access to inland China? What geographic feature made this possible?

the **Open Door Policy**. This proposed that China’s “doors” be open to merchants of all nations. Britain and the other European nations agreed. The policy thus protected both U.S. trading rights in China, and China’s freedom from colonization. But the country was still at the mercy of foreign powers.

An Upsurge in Chinese Nationalism

Humiliated by their loss of power, many Chinese pressed for strong reforms. Among those demanding change was China’s young emperor, Guangxu (gwahng•shoo). In June 1898, Guangxu introduced measures to modernize China. These measures called for reorganizing China’s educational system, strengthening the economy, modernizing the military, and streamlining the government.

Most Qing officials saw these innovations as threats to their power. They reacted with alarm, calling the Dowager Empress back to the imperial court. On her return, she acted with great speed. She placed Guangxu under arrest and took control of the government. She then reversed his reforms. Guangxu’s efforts brought about no change whatsoever. The Chinese people’s frustration with their situation continued to grow.

The Boxer Rebellion This widespread frustration finally erupted into violence. Poor peasants and workers resented the special privileges granted to foreigners. They also resented Chinese Christians, who had adopted a foreign faith. To demonstrate their discontent, they formed a secret organization called the Society of Righteous and Harmonious Fists. They soon came to be known as the Boxers. Their campaign against the Dowager Empress’s rule and foreigner privilege was called the **Boxer Rebellion**.



HISTORY

VIDEO

China:
Boxer Uprising

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In the spring of 1900, the Boxers descended on Beijing. Shouting “Death to the foreign devils,” the Boxers surrounded the European section of the city. They kept it under siege for several months. The Dowager Empress expressed support for the Boxers but did not back her words with military aid. In August, a multinational force of 19,000 troops marched on Beijing and quickly defeated the Boxers. **C**



▲ A gang of Boxers attacks Chinese Christians.

MAIN IDEA

Analyzing Causes

C Why did the Boxer Rebellion fail?

Despite the failure of the Boxer Rebellion, a strong sense of nationalism had emerged in China. The Chinese people realized that their country must resist more foreign intervention. Even more important, they felt that the government must become responsive to their needs.

The Beginnings of Reform At this point, even the Qing court realized that China needed to make profound changes to survive. In 1905, the Dowager Empress sent a select group of Chinese officials on a world tour to study the operation of different governments. The group traveled to Japan, the United States, Britain, France, Germany, Russia, and Italy. On their return in the spring of 1906, the officials recommended that China restructure its government. They based their suggestions on the constitutional monarchy of Japan. The empress accepted this recommendation and began making reforms. Although she convened a national assembly within a year, change was slow. In 1908, the court announced that it would establish a full constitutional government by 1917.

However, the turmoil in China did not end with these progressive steps. China experienced unrest for the next four decades as it continued to face internal and external threats. China’s neighbor Japan also faced pressure from the West during this time. But it responded to this influence in a much different way.

SECTION

1

ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- Opium War
- extraterritorial rights
- Taiping Rebellion
- sphere of influence
- Open Door Policy
- Boxer Rebellion

USING YOUR NOTES

2. Which created the most trouble for China, internal problems or external problems? Why?

China's Problems	
Internal	External

MAIN IDEAS

3. Why did the Chinese have little interest in trading with the West?
4. What internal problems did China face prior to the Taiping Rebellion?
5. Why did Emperor Guangxu’s efforts at reform and modernization fail?

CRITICAL THINKING & WRITING

6. **ANALYZING MOTIVES** Why do you think European powers established spheres of influence in China rather than colonies, as they did in Africa and other parts of Asia?
7. **MAKING INFERENCES** What importance did spheres of influence have for China?
8. **COMPARING AND CONTRASTING** What were the similarities and differences between the Taiping Rebellion and the Boxer Rebellion?
9. **WRITING ACTIVITY** **CULTURAL INTERACTION** Write a **dialogue** between two of Dowager Empress Cixi’s advisers—one arguing for continued isolation, the other for openness to foreign influence and trade.

MULTIMEDIA ACTIVITY **CREATING AN ANNOTATED MAP**



Use the Internet to find information on special economic zones in China. Use your findings to create an **annotated map** showing the location of these zones.

INTERNET KEYWORDS
special economic zones,
SEZs



Modernization in Japan

MAIN IDEA

CULTURAL INTERACTION Japan followed the model of Western powers by industrializing and expanding its foreign influence.

WHY IT MATTERS NOW

Japan's continued development of its own way of life has made it a leading world power.

TERMS & NAMES

- Treaty of Kanagawa
- Meiji era
- Russo-Japanese War
- annexation

SETTING THE STAGE In the early 17th century, Japan had shut itself off from almost all contact with other nations. Under the rule of the Tokugawa shoguns, Japanese society was very tightly ordered. The shogun parceled out land to the daimyo, or lords. The peasants worked for and lived under the protection of their daimyo and his small army of samurai, or warriors. This rigid feudal system managed to keep the country free of civil war. Peace and relative prosperity reigned in Japan for two centuries.

Japan Ends Its Isolation



Use the graphic organizer online to take notes on the steps that Japan took toward modernization and the events that contributed to its growth as an imperialistic power.

The Japanese had almost no contact with the industrialized world during this time of isolation. They continued, however, to trade with China and with Dutch merchants from Indonesia. They also had diplomatic contact with Korea. However, trade was growing in importance, both inside and outside Japan.

The Demand for Foreign Trade Beginning in the early 19th century, Westerners tried to convince the Japanese to open their ports to trade. British, French, Russian, and American officials occasionally anchored off the Japanese coast. Like China, however, Japan repeatedly refused to receive them. Then, in 1853, U.S. Commodore Matthew Perry took four ships into what is now Tokyo Harbor. These massive black wooden ships powered by steam astounded the Japanese. The ships' cannons also shocked them. The Tokugawa shogun realized he had no choice but to receive Perry and the letter Perry had brought from U.S. president Millard Fillmore.

Fillmore's letter politely asked the shogun to allow free trade between the United States and Japan. Perry delivered it with a threat, however. He would come back with a larger fleet in a year to receive Japan's reply. That reply was the **Treaty of Kanagawa** of 1854. Under its terms, Japan opened two ports at which U.S. ships could take on supplies. After the United States had pushed open the door, other Western powers soon followed. By 1860, Japan, like China, had granted foreigners permission to trade at several treaty ports. It had also extended extraterritorial rights to many foreign nations.

Meiji Reform and Modernization The Japanese were angry that the shogun had given in to the foreigners' demands. They turned to Japan's young emperor, Mutsuhito (moot•soo•HEE•toh), who seemed to symbolize the country's sense of

pride and nationalism. In 1867, the Tokugawa shogun stepped down, ending the military dictatorships that had lasted since the 12th century. Mutsuhito took control of the government. He chose the name *Meiji* for his reign, which means “enlightened rule.” Mutsuhito’s reign, which lasted 45 years, is known as the **Meiji era**.

The Meiji emperor realized that the best way to counter Western influence was to modernize. He sent diplomats to Europe and North America to study Western ways. The Japanese then chose what they believed to be the best that Western civilization had to offer and adapted it to their own country. They admired Germany’s strong centralized government, for example. And they used its constitution as a model for their own. The Japanese also admired the discipline of the German army and the skill of the British navy. They attempted to imitate these European powers as they modernized their military. Japan adopted the American system of universal public education and required that all Japanese children attend school. Their teachers often included foreign experts. Students could go abroad to study as well.

The emperor also energetically supported following the Western path of industrialization. By the early 20th century, the Japanese economy had become as modern as any in the world. The country built its first railroad line in 1872. The track connected Tokyo, the nation’s capital, with the port of Yokohama, 20 miles to the south. By 1914, Japan had more than 7,000 miles of railroad. Coal production grew from half a million tons in 1875 to more than 21 million tons in 1913. Meanwhile, large, state-supported companies built thousands of factories. Traditional Japanese industries, such as tea processing and silk production, expanded to give the country unique products to trade. Developing modern industries, such as shipbuilding, made Japan competitive with the West.

Imperial Japan

Japan’s race to modernize paid off. By 1890, the country had several dozen warships and 500,000 well-trained, well-armed soldiers. It had become the strongest military power in Asia.

Japan had gained military, political, and economic strength. It then sought to eliminate the extraterritorial rights of foreigners. The Japanese foreign minister assured foreigners that they could rely on fair treatment in Japan. This was because its constitution and legal codes were similar to those of European nations, he explained. His reasoning was convincing, and in 1894, foreign powers accepted the

China and Japan Confront the West



China

- Remains committed to traditional values
- Loses numerous territorial conflicts
- Grants other nations-spheres of influence within China
- Finally accepts necessity for reform

Both

- Have well-established traditional values
- Initially resist change
- Oppose Western imperialism

Japan

- Considers modernization to be necessary
- Borrows and adapts Western ways
- Strengthens its economic and military power
- Becomes an empire builder



▲ The Dowager Empress Cixi (1862–1908)

SKILLBUILDER: Interpreting Charts

1. **Contrasting** According to the diagram, in what ways did China and Japan deal differently with Western influence?
2. **Comparing** What similar responses did each country share despite the different paths they followed?

▲ The Meiji Emperor Mutsuhito (1867–1912)

abolition of extraterritorial rights for their citizens living in Japan. Japan's feeling of strength and equality with the Western nations rose.

As Japan's sense of power grew, the nation also became more imperialistic. As in Europe, national pride played a large part in Japan's imperial plans. The Japanese were determined to show the world that they were a powerful nation. **A**

Japan Attacks China The Japanese first turned their sights to their neighbor, Korea. In 1876, Japan forced Korea to open three ports to Japanese trade. But China also considered Korea to be important both as a trading partner and a military outpost. Recognizing their similar interests in Korea, Japan and China signed a hands-off agreement. In 1885, both countries pledged that they would not send their armies into Korea.

In June 1894, however, China broke that agreement. Rebellions had broken out against Korea's king. He asked China for military help in putting them down. Chinese troops marched into Korea. Japan protested and sent its troops to Korea to fight the Chinese. This Sino-Japanese War lasted just a few months. In that time, Japan drove the Chinese out of Korea, destroyed the Chinese navy, and gained a foothold in Manchuria. In 1895, China and Japan signed a peace treaty. This treaty gave Japan its first colonies, Taiwan and the neighboring Pescadores Islands. (See the map on page 803.)

Russo-Japanese War Japan's victory over China changed the world's balance of power. Russia and Japan emerged as the major powers—and enemies—in East Asia. The two countries soon went to war over Manchuria. In 1903, Japan offered to recognize Russia's rights in Manchuria if the Russians would agree to stay out of Korea. But the Russians refused.

In February 1904, Japan launched a surprise attack on Russian ships anchored off the coast of Manchuria. In the resulting **Russo-Japanese War**, Japan drove

MAIN IDEA

Making Inferences

A Why did Japan become imperialistic?

Vocabulary

Sino: a prefix meaning "Chinese"

> Analyzing Political Cartoons

Warlike Japan

Cartoonists often use symbols to identify the countries, individuals, or even ideas featured in their cartoons. Russia has long been symbolized as a bear by cartoonists. Here, the cartoonist uses a polar bear.

Prior to the Meiji era, cartoonists usually pictured Japan as a fierce samurai. Later, however, Japan often was symbolized by a caricature of Emperor Mutsuhito. Here, the cartoonist has exaggerated the emperor's physical features to make him look like a bird of prey.

SKILLBUILDER: Interpreting Political Cartoons

- 1. Clarifying** How does the cartoonist signify that Japan is warlike?
- 2. Making Inferences** In their fight, Russia and Japan appear to be crushing someone. Who do you think this might be?



Western Views of the East

The Japanese victory over the Russians in 1905 exploded a strong Western myth. Many Westerners believed that white people were a superior race. The overwhelming success of European colonialism and imperialism in the Americas, Africa, and Asia had reinforced this belief. But the Japanese had shown Europeans that people of other races were their equals in modern warfare.

Unfortunately, Japan's military victory led to a different form of Western racism. Influenced by the ideas of Germany's Emperor Wilhelm II, the West imagined the Japanese uniting with the Chinese and conquering Europe. The resulting racist Western fear of what was called the *yellow peril* influenced world politics for many decades.

Russian troops out of Korea and captured most of Russia's Pacific fleet. It also destroyed Russia's Baltic fleet, which had sailed all the way around Africa to participate in the war.

In 1905, Japan and Russia began peace negotiations. U.S. president Theodore Roosevelt helped draft the treaty, which the two nations signed on a ship off Portsmouth, New Hampshire. This agreement, the Treaty of Portsmouth, gave Japan the captured territories. It also forced Russia to withdraw from Manchuria and to stay out of Korea.

Japanese Occupation of Korea After defeating Russia, Japan attacked Korea with a vengeance. In 1905, it made Korea a protectorate. Japan sent in "advisers," who grabbed more and more power from the Korean government. The Korean king was unable to rally international support for his regime. In 1907, he gave up control of the country. Within two years the Korean Imperial Army was disbanded. In 1910, Japan officially imposed **annexation** on Korea, or brought that country under Japan's control.

The Japanese were harsh rulers. They shut down Korean newspapers and took over Korean schools. There they replaced the study of Korean language and history with Japanese subjects. They took land away from Korean farmers and gave it to Japanese settlers. They encouraged Japanese businessmen to start industries in Korea, but forbade Koreans from going into business. Resentment of Japan's repressive rule grew, helping to create a strong Korean nationalist movement. **B**

The rest of the world clearly saw the brutal results of Japan's imperialism. Nevertheless, the United States and other European countries largely ignored what was happening in Korea. They were too busy with their own imperialistic aims, as you will learn in Section 3.

Vocabulary

protectorate: a country under the partial control and protection of another nation

MAIN IDEA

Clarifying

B How did Japan treat the Koreans after it annexed the country?

SECTION 2 ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- Treaty of Kanagawa
- Meiji era
- Russo-Japanese War
- annexation

USING YOUR NOTES

2. Do you think that Japan could have become an imperialistic power if it had not modernized? Why or why not?

Modernization
Imperialism

MAIN IDEAS

3. How was the Treaty of Kanagawa similar to the treaties that China signed with various European powers?
4. What steps did the Meiji emperor take to modernize Japan?
5. How did Japan begin its quest to build an empire?

CRITICAL THINKING & WRITING

6. **ANALYZING CAUSES** What influences do you think were most important in motivating Japan to build its empire?
7. **FORMING AND SUPPORTING OPINIONS** In your view, was Japan's aggressive imperialism justified? Support your answer with information from the text.
8. **ANALYZING BIAS** How did Japan's victory in the Russo-Japanese War both explode and create stereotypes?
9. **WRITING ACTIVITY** **EMPIRE BUILDING** In the role of a Japanese official, write a **letter** to the government of a Western power explaining why you think it is necessary for your country to build an empire.


CONNECT TO TODAY CREATING A SYMBOL

Conduct research to discover the name that Akihito, the present emperor of Japan, chose for his reign. Then create a **symbol** that expresses the meaning of this name.

Japanese Woodblock Printing

Woodblock printing in Japan evolved from black-and-white prints created by Buddhists in the 700s. By the late 1700s, artists learned how to create multicolor prints.

Woodblock prints could be produced quickly and in large quantities, so they were cheaper than paintings. In the mid-1800s, a Japanese person could buy a woodblock print for about the same price as a bowl of noodles. As a result, woodblock prints like those shown here became a widespread art form. The most popular subjects included actors, beautiful women, urban life, and landscapes.

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RESEARCH WEB LINKS Go online for more on Japanese woodblock printing.



▲ Naniwaya Okita

The artist Kitagawa Utamaro created many prints of attractive women. This print shows Naniwaya Okita, a famous beauty of the late 1700s. Her long face, elaborate hairstyle, and many-colored robes were all considered part of her beauty.



▲ Carving the Block

These photographs show a modern artist carving a block for the black ink. (The artist must carve a separate block for each color that will be in the final print.)

Carving the raised image requires precision and patience. For example, David Bull, the artist in the photographs, makes five cuts to create each strand of hair. One slip of the knife, and the block will be ruined.



▲ Under the Wave off Kanagawa

Katsushika Hokusai was one of the most famous of all Japanese printmakers. This scene is taken from his well-known series *Thirty-Six Views of Mount Fuji*. Mount Fuji, which many Japanese considered sacred, is the small peak in the background of this scene.



▲ Printing

After the carved block is inked, the artist presses paper on it, printing a partial image. He or she repeats this stage for each new color. The artist must ensure that every color ends up in exactly the right place, so that no blocks of color extend beyond the outlines or fall short of them.

Connect to Today

1. Making Inferences What personal qualities and skills would an artist need to be good at making woodblock prints?

See Skillbuilder Handbook, page R10.

2. Forming and Supporting Opinions Hokusai's print of the wave, shown above, remains very popular today. Why do you think this image appeals to modern people?



U.S. Economic Imperialism

MAIN IDEA

EMPIRE BUILDING The United States put increasing economic and political pressure on Latin America during the 19th century.

WHY IT MATTERS NOW

This policy set the stage for 20th-century relations between Latin America and the United States.

TERMS & NAMES

- caudillo
- Monroe Doctrine
- José Martí
- Spanish-American War
- Panama Canal
- Roosevelt Corollary

SETTING THE STAGE Latin America’s long struggle to gain independence from colonial domination between the late 18th and the mid-19th centuries left the new nations in shambles. Farm fields had been neglected and were overrun with weeds. Buildings in many cities bore the scars of battle. Some cities had been left in ruins. The new nations of Latin America faced a struggle for economic and political recovery that was every bit as difficult as their struggle for independence had been.

Latin America After Independence

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

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

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

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

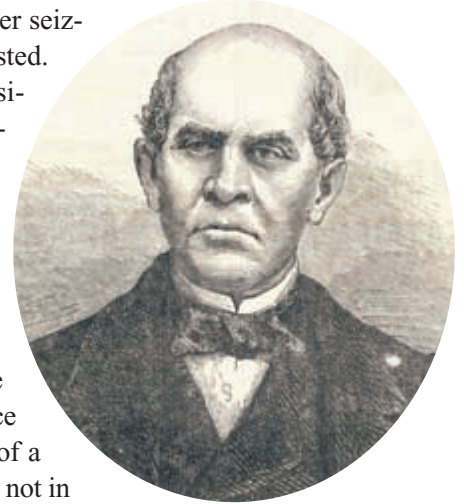


Use the graphic organizer online to take notes on the major events in U.S. involvement in Latin America.

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

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

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



▲ Argentine reformer Domingo Sarmiento

MAIN IDEA

Identifying Problems

A What difficulties did lower-class Latin Americans continue to face after independence?

Economies Grow Under Foreign Influence

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

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

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

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



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

History Makers



José Martí
1853–1895

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

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

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RESEARCH WEB LINKS Go online for more on José Martí.

A Latin American Empire

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

The Monroe Doctrine Most Latin American colonies had gained their independence by the early 1800s. But their position was not secure. Many Latin Americans feared that European countries would try to reconquer the new republics. The United States, a young nation itself, feared this too. So, in 1823, President James Monroe issued what came to be called the **Monroe Doctrine**. This document stated that "the American continents . . . are henceforth not to be considered as subjects for future colonization by any European powers." Until 1898, though, the United States did little to enforce the Monroe Doctrine. Cuba provided a real testing ground.

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

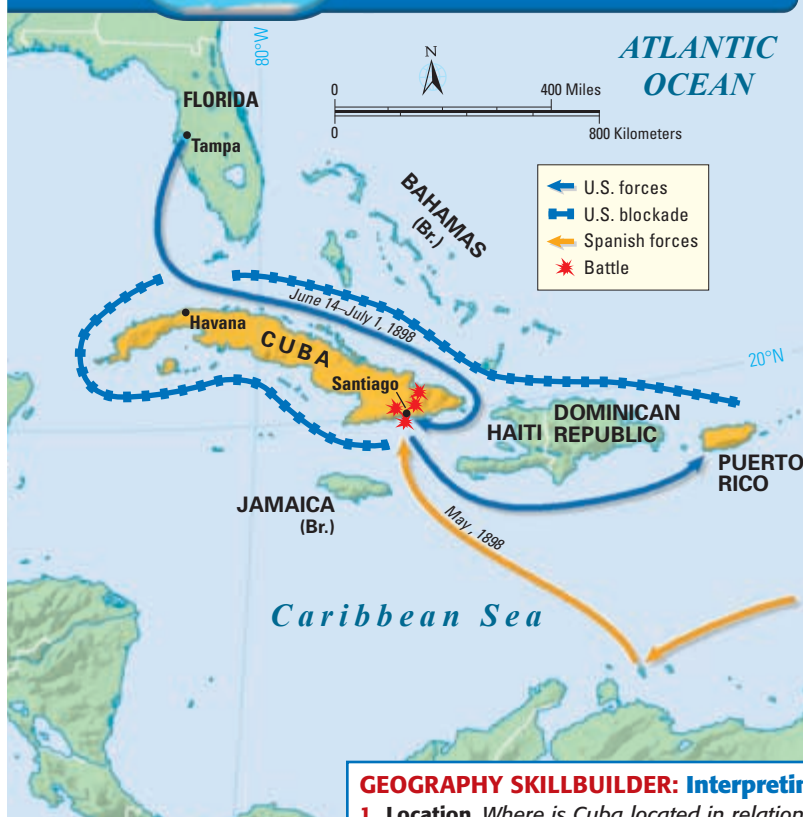
By the mid-1890s, the United States had developed substantial business holdings in Cuba. Therefore it had an economic stake in the fate of the country. In addition, the Spanish had forced many Cuban civilians into concentration camps. Americans objected to the Spanish brutality. In 1898, the United States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

MAIN IDEA

Analyzing Motives

B Why did the United States join the Cuban war for independence?

The Spanish-American War, 1898: the Caribbean



The Spanish-American War, 1898: the Philippines



GEOGRAPHY SKILLBUILDER: Interpreting Maps

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

In 1901, Cuba became an independent nation, at least in name. However, the United States installed a military government and continued to exert control over Cuban affairs. This caused tremendous resentment among many Cubans, who had assumed that the United States' aim in intervening was to help Cuba become truly independent. The split that developed between the United States and Cuba at this time continues to keep these close neighbors miles apart more than a century later.

After its defeat in the Spanish-American War, Spain turned over the last of its colonies. Puerto Rico, Guam, and the Philippines became U.S. territories. Having become the dominant imperial power in Latin America, the United States next set its sights on Panama.

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

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

Vocabulary

A colossus is a huge statue that towers over the surrounding area.

Panama Canal

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

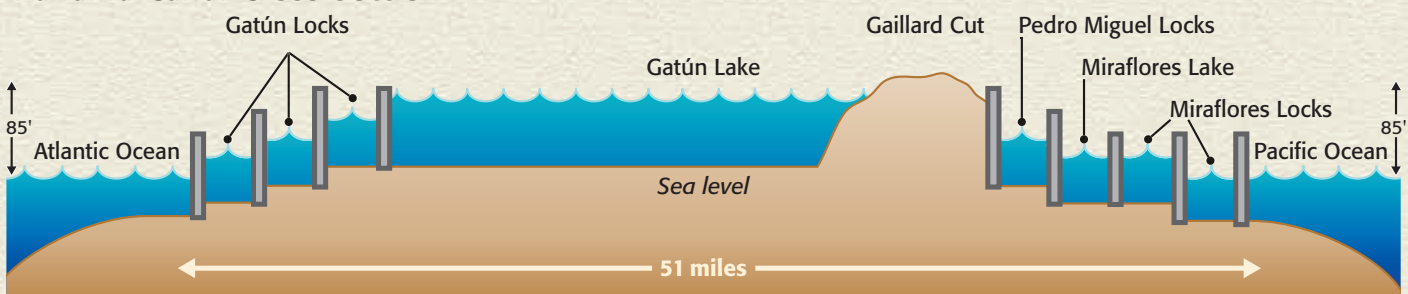
The canal also had a lasting effect on other technologies. Since the early 1900s, ships have been built to dimensions that will allow them to pass through the canal's locks.



H
HISTORY VIDEO
Panama Canal
hmhsocialstudies.com

▲ Ships passing through the Pedro Miguel Locks

Panama Canal Cross-section



Canal Facts

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

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

Connect to Today

- 1. Identifying Problems** What difficulties did workers face in constructing the canal?
See Skillbuilder Handbook, page-R5.
- 2. Evaluating Decisions** In the more than 90 years since it was built, do you think that the benefits of the Panama Canal to world trade have outweighed the costs in time, money, and human life? Explain your answer.

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

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

The Roosevelt Corollary The building of the Panama Canal was only one way that the United States expanded its influence in Latin America in the early 20th century. Its presence in Cuba and its large investments in many Central and South American countries strengthened its foothold. To protect those economic interests, in 1904, President Roosevelt issued a corollary, or extension, to the Monroe Doctrine. The **Roosevelt Corollary** gave the United States the right to be “an international police power” in the Western Hemisphere.

The United States used the Roosevelt Corollary many times in the following years to justify U.S. intervention in Latin America. U.S. troops occupied some countries for decades. Many Latin Americans protested this intervention, but they were powerless to stop their giant neighbor to the north. The U.S. government simply turned a deaf ear to their protests. It could not ignore the rumblings of revolution just over its border with Mexico, however. You will learn about this revolution in Section 4.

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



MAIN IDEA

Analyzing Motives

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

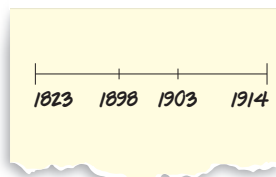
SECTION 3 ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- caudillo
- Monroe Doctrine
- José Martí
- Spanish-American War
- Panama Canal
- Roosevelt Corollary

USING YOUR NOTES

2. Which event do you think was most beneficial to Latin America? Why?



MAIN IDEAS

3. Why did the gap between rich and poor in Latin America grow after independence?
4. What economic gains and setbacks did Latin American countries experience after independence?
5. Why was the United States so interested in the security of Latin America?

CRITICAL THINKING & WRITING

6. **ANALYZING MOTIVES** Why do you think upper-class Latin Americans favored governments run by caudillos?
7. **FORMING OPINIONS** Do you think that U.S. imperialism was more beneficial or harmful to Latin American people? Explain.
8. **CONTRASTING** How was the principle of the Roosevelt Corollary different from that of the Monroe Doctrine?
9. **WRITING ACTIVITY** **REVOLUTION** Assume the role of a Cuban fighting for independence from Spain. Design a political **poster** that shows your feelings about the United States joining the struggle for independence.

CONNECT TO TODAY CREATING A DATAFILE

Conduct research to find statistics on the ships and cargo that travel through the Panama Canal. Use your findings to create a **datafile** for usage of the canal in a recent year.



Turmoil and Change in Mexico

MAIN IDEA

REVOLUTION Political, economic, and social inequalities in Mexico triggered a period of revolution and reform.

WHY IT MATTERS NOW

Mexico has moved toward political democracy and is a strong economic force in the Americas.

TERMS & NAMES

- Antonio López de Santa Anna
- Benito Juárez
- *La Reforma*
- Porfirio Díaz
- Francisco Madero
- “Pancho” Villa
- Emiliano Zapata

SETTING THE STAGE The legacy of Spanish colonialism and long-term political instability that plagued the newly emerging South American nations caused problems for Mexico as well. Mexico, however, had a further issue to contend with—a shared border with the United States. The “Colossus of the North,” as the United States was known in Latin America, wanted to extend its territory all the way west to the Pacific Ocean. But most of the lands in the American Southwest belonged to Mexico.

Santa Anna and the Mexican War

During the early 19th century, no one dominated Mexican political life more than **Antonio López de Santa Anna**. Santa Anna played a leading role in Mexico’s fight for independence from Spain in 1821. In 1829, he fought against Spain again as the European power tried to regain control of Mexico. Then, in 1833, Santa Anna became Mexico’s president.

One of Latin America’s most powerful caudillos, Santa Anna was a clever politician. He would support a measure one year and oppose it the next if he thought that would keep him in power. His policy seemed to work. Between 1833 and 1855, Santa Anna was Mexico’s president four times. He gave up the presidency twice, however, to serve Mexico in a more urgent cause—leading the Mexican army in an effort to retain the territory of Texas.

The Texas Revolt In the 1820s, Mexico encouraged American citizens to move to the Mexican territory of Texas to help populate the country. Thousands of English-speaking colonists, or Anglos, answered the call. In return for inexpensive land, they pledged to follow the laws of Mexico. As the Anglo population grew, though, tensions developed between the colonists and Mexico over several issues, including slavery and religion. As a result, many Texas colonists wanted greater self-government. But when Mexico refused to grant this, Stephen Austin, a leading Anglo, encouraged a revolt against Mexico in 1835.



▼ Mexican leader Santa Anna



Use the graphic organizer online to take notes on the major accomplishments of the Mexican leaders discussed in this section.



◀ Santa Anna's army met with strong resistance from the defenders of the Alamo.

Santa Anna led Mexican forces north to try to hold on to the rebellious territory. He won a few early battles, including a bitter fight at the Alamo, a mission in San Antonio. However, his fortunes changed at the Battle of San Jacinto. His troops were defeated and he was captured. Texan leader Sam Houston released Santa Anna after he promised to respect the independence of Texas. When Santa Anna returned to Mexico in 1836, he was quickly ousted from power.

War and the Fall of Santa Anna Santa Anna regained power, though, and fought against the United States again. In 1845, the United States annexed Texas. Outraged Mexicans considered this an act of aggression. In a dispute over the border, the United States invaded Mexico. Santa Anna's army fought valiantly, but U.S. troops defeated them after two years of war. In 1848, the two nations signed the Treaty of Guadalupe Hidalgo. The United States received the northern third of what was then Mexico, including California and the American Southwest. Santa Anna went into exile. He returned as dictator one final time, however, in 1853. After his final fall, in 1855, he remained in exile for almost 20 years. When he returned to Mexico in 1874, he was poor, blind, powerless, and essentially forgotten.

Juárez and *La Reforma*

During the mid-19th century, as Santa Anna's power rose and fell, a liberal reformer, **Benito Juárez** (HWAHR•ehz), strongly influenced the politics of Mexico. Juárez was Santa Anna's complete opposite in background as well as in goals. Santa Anna came from a well-off Creole family. Juárez was a poor Zapotec Indian who was orphaned at the age of three. While Santa Anna put his own personal power first, Juárez worked primarily to serve his country. **A**

Juárez Rises to Power Ancestry and racial background were important elements of political power and economic success in 19th-century Mexico. For that reason, the rise of Benito Juárez was clearly due to his personal leadership qualities. Juárez was raised on a small farm in the Mexican state of Oaxaca. When he was 12, he moved to the city of Oaxaca. He started going to school at age 15, and in 1829, he entered a newly opened state-run university. He received a law degree in 1831.

MAIN IDEA

Contrasting

A In what ways did Benito Juárez differ from Santa Anna?

Juárez: Symbol of Mexican Independence

In 1948, more than 75 years after Benito Juárez's death, Mexican mural painter José Clemente Orozco celebrated him in the fresco *Juárez, the Church and the Imperialists*. A portrait of Juárez, which accentuates his Indian features, dominates the work. The supporters of Emperor Maximilian, carrying his body, are shown below Juárez. To either side of Juárez, the soldiers of Mexican independence prepare to attack these representatives of imperialism. By constructing the fresco in this way, Orozco seemed to suggest that Juárez was both a symbol of hope and a rallying cry for Mexican independence.

SKILLBUILDER: Interpreting Visual Sources

- 1. Contrasting** How is Orozco's portrayal of the imperialists different from his portrayal of the forces of independence?
- 2. Drawing Conclusions** Based on this fresco, how do you think Orozco felt about Benito Juárez?



He then returned to the city of Oaxaca, where he opened a law office. Most of his clients were poor people who could not otherwise have afforded legal assistance. Juárez gained a reputation for honesty, integrity, hard work, and good judgment. He was elected to the city legislature and then rose steadily in power. Beginning in 1847, he served as governor of the state of Oaxaca.

Juárez Works for Reform Throughout the late 1840s and early 1850s, Juárez worked to start a liberal reform movement. He called this movement *La Reforma*. Its major goals were redistribution of land, separation of church and state, and increased educational opportunities for the poor. In 1853, however, Santa Anna sent Juárez and other leaders of *La Reforma* into exile.

Just two years later, a rebellion against Santa Anna brought down his government. Juárez and other exiled liberal leaders returned to Mexico to deal with their country's tremendous problems. As in other Latin American nations, rich landowners kept most other Mexicans in a cycle of debt and poverty. Liberal leader Ponciano Arriaga described how these circumstances led to great problems for both poor farmers and the government:

PRIMARY SOURCE **B**

There are Mexican landowners who occupy . . . an extent of land greater than the areas of some of our sovereign states, greater even than that of one of several European states. In this vast area, much of which lies idle, deserted, abandoned . . . live four or five million Mexicans who know no other industry than agriculture, yet are without land or the means to work it, and who cannot emigrate in the hope of bettering their fortunes. . . . How can a hungry, naked, miserable people practice popular government? How can we proclaim the equal rights of men and leave the majority of the nation in [this condition]?

PONCIANO ARRIAGA, speech to the Constitutional Convention, 1856–1857

Not surprisingly, Arriaga's ideas and those of the other liberals in government threatened most conservative upper-class Mexicans. Many conservatives responded

MAIN IDEA

Analyzing Primary Sources

B What does Ponciano Arriaga think is Mexico's greatest problem?

by launching a rebellion against the liberal government in 1858. They enjoyed some early successes in battle and seized control of Mexico City. The liberals kept up the fight from their headquarters in the city of Veracruz. Eventually the liberals gained the upper hand and, after three years of bitter civil war, they defeated the rebels. Juárez became president of the reunited country after his election in 1861.

The French Invade Mexico The end of the civil war did not bring an end to Mexico's troubles, though. Exiled conservatives plotted with some Europeans to reconquer Mexico. In 1862, French ruler Napoleon III responded by sending a large army to Mexico. Within 18 months, France had taken over the country. Napoleon appointed Austrian Archduke Maximilian to rule Mexico as emperor. Juárez and other Mexicans fought against French rule. After five years under siege, the French decided that the struggle was too costly. In 1867, Napoleon ordered the army to withdraw from Mexico. Maximilian was captured and executed.

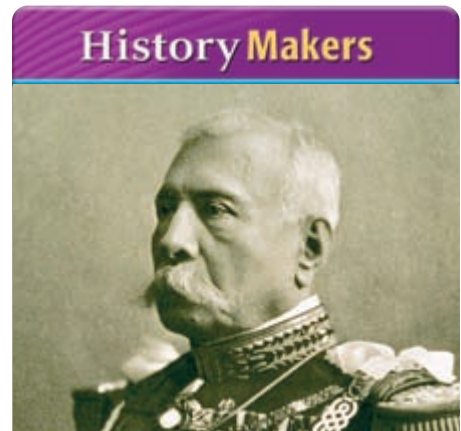
Juárez was reelected president of Mexico in 1867. He returned to the reforms he had proposed more than ten years earlier. He began rebuilding the country, which had been shattered during years of war. He promoted trade with foreign countries, the opening of new roads, the building of railroads, and the establishment of a telegraph service. He set up a national education system separate from that run by the Catholic Church. In 1872, Juárez died of a heart attack. But after half a century of civil strife and chaos, he left his country a legacy of relative peace, progress, and reform.

Porfirio Díaz and "Order and Progress"

Juárez's era of reform did not last long, however. In the mid-1870s, a new caudillo, **Porfirio Díaz**, came to power. Like Juárez, Díaz was an Indian from Oaxaca. He rose through the army and became a noted general in the civil war and the fight against the French. Díaz expected to be rewarded with a government position for the part he played in the French defeat. Juárez refused his request, however. After this, Díaz opposed Juárez. In 1876, Díaz took control of Mexico by ousting the president. He had the support of the military, whose power had been reduced during and after the Juárez years. Indians and small landholders also supported him, because they thought he would work for more radical land reform.

During the Díaz years, elections became meaningless. Díaz offered land, power, or political favors to anyone who supported him. He terrorized many who refused to support him, ordering them to be beaten or put in jail. Using such strong-arm methods, Díaz managed to remain in power until 1911. Over the years, Díaz used a political slogan adapted from a rallying cry of the Juárez era. Juárez had called for "Liberty, Order, and Progress." Díaz, however, wanted merely "Order and Progress."

Díaz's use of dictatorial powers ensured that there was order in Mexico. But the country saw progress under Díaz too. Railroads expanded, banks were built, the currency stabilized, and foreign investment grew. Mexico seemed to be a stable, prospering country. Appearances were deceiving,



Porfirio Díaz
1830–1915

To control all the various groups in Mexican society, Porfirio Díaz adopted an approach called *pan o palo*—"bread or the club." The "bread" he provided took many forms. To potential political opponents, he offered positions in his government. To business leaders, he gave huge subsidies or the chance to operate as monopolies in Mexico. And he won the support of the Church and wealthy landowners simply by promising not to meddle in their affairs. Those who turned down the offer of bread and continued to oppose Díaz soon felt the blow of the club. Thousands were killed, beaten, or thrown into jail.

His use of the club, Díaz admitted, was harsh and cruel—but also necessary if Mexico was to have peace. That peace, Díaz argued, enabled the country to progress economically. "If there was cruelty," he said, "results have justified it."

Recognizing Effects

C What effects did Díaz's rule have on Mexico?

however. The wealthy acquired more and more land, which they did not put to good use. As a result, food costs rose steadily. Most Mexicans remained poor farmers and workers, and they continued to grow poorer. **C**

Revolution and Civil War

In the early 1900s, Mexicans from many walks of life began to protest Díaz's harsh rule. Idealistic liberals hungered for liberty. Farm laborers hungered for land. Workers hungered for fairer wages and better working conditions. Even some of Díaz's handpicked political allies spoke out for reform. A variety of political parties opposed to Díaz began to form. Among the most powerful was a party led by Francisco Madero.

Madero Begins the Revolution Born into one of Mexico's ten richest families, **Francisco Madero** was educated in the United States and France. He believed in democracy and wanted to strengthen its hold in Mexico. Madero announced his candidacy for president of Mexico early in 1910. Soon afterward, Díaz had him arrested. From exile in the United States, Madero called for an armed revolution against Díaz.

The Mexican Revolution began slowly. Leaders arose in different parts of Mexico and gathered their own armies. In the north, Francisco **"Pancho" Villa** became immensely popular. He had a bold Robin Hood policy of taking money from the rich and giving it to the poor. South of Mexico City, another strong, popular leader, **Emiliano Zapata**, raised a powerful revolutionary army. Like Villa, Zapata came from a poor family. He was determined to see that land was returned to peasants and small farmers. He wanted the laws reformed to protect their rights. *"Tierra y Libertad"* ("Land and Liberty") was his battle cry. Villa, Zapata, and other armed revolutionaries won important victories against Díaz's army. By the spring of 1911, Díaz agreed to step down. He called for new elections.

Mexican Leaders Struggle for Power Madero was elected president in November 1911. However, his policies were seen as too liberal by some and not revolutionary enough by others. Some of those who had supported Madero, including Villa and Zapata, took up arms against him. In 1913, realizing that he could not hold on to power, Madero resigned. The military leader General Victoriano Huerta then took over the presidency. Shortly after, Madero was assassinated, probably on Huerta's orders.

Huerta was unpopular with many people, including Villa and Zapata. These revolutionary leaders allied themselves with Venustiano Carranza, another politician who wanted to overthrow Huerta. Their three armies advanced, seizing the Mexican countryside from Huerta's forces and approaching the capital, Mexico City. They overthrew Huerta only 15 months after he took power.

Carranza took control of the government and then turned his army on his former revolutionary allies. Both Villa and Zapata continued to fight. In 1919, however, Carranza lured

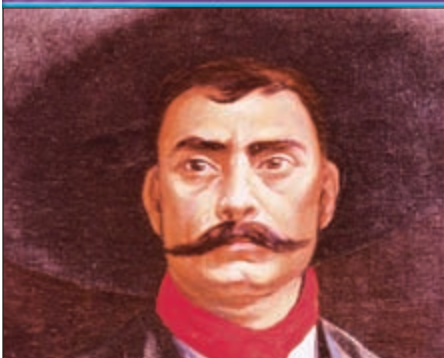


VIDEO

The Peasant Revolution

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History Makers



Emiliano Zapata 1879–1919

Shortly after Francisco Madero took office, he met with Emiliano Zapata, one of his leading supporters. Madero's reluctance to quickly enact real land reform angered Zapata. He left the meeting convinced that Madero was not the man to carry through the Mexican Revolution.

A few days later, Zapata issued the Plan of Ayala. This called for the removal of Madero and the appointment of a new president. The plan also demanded that the large landowners give up a third of their land for redistribution to the peasants. Zapata's rallying cry, "Land and Liberty," grew out of the Plan of Ayala.

When Venustiano Carranza ordered Zapata's assassination, he expected Zapata's revolutionary ideas on land reform to die with him. However, they lived on and were enacted by Alvaro Obregón, a follower of Zapata, who seized power from Carranza in 1920.

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INTERNET ACTIVITY Go online to create a short biographical dictionary of the leaders of the Mexican Revolution.

Reforms of Mexican Constitution of 1917

Land	Religion	Labor	Social Issues
<ul style="list-style-type: none"> • Breakup of large estates • Restrictions on foreign ownership of land • Government control of resources (oil) 	<ul style="list-style-type: none"> • State takeover of land owned by the Church 	<ul style="list-style-type: none"> • Minimum wage for workers • Right to strike • Institution of labor unions 	<ul style="list-style-type: none"> • Equal pay for equal work • Limited legal rights for women (spending money and bringing lawsuits)

SKILLBUILDER: Interpreting Charts

- 1. Making Inferences** Which reforms do you think landowners resented?
- 2. Recognizing Effects** Which reforms benefited workers?

Zapata into a trap and murdered him. With Zapata's death, the civil war also came to an end. More than a million Mexicans had lost their lives.

The New Mexican Constitution Carranza began a revision of Mexico's constitution. It was adopted in 1917. A revolutionary document, that constitution is still in effect today. As shown in the chart above, it promoted education, land reforms, and workers' rights. Carranza did not support the final version of the constitution, however, and in 1920, he was overthrown by one of his generals, Alvaro Obregón.

Although Obregón seized power violently, he did not remain a dictator. Instead, he supported the reforms the constitution called for, particularly land reform. He also promoted public education. Mexican public schools taught a common language—Spanish—and stressed nationalism. In this way, his policies helped unite the various regions and peoples of the country. Nevertheless, Obregón was assassinated in 1928. **D**

The next year, a new political party, the Institutional Revolutionary Party (PRI), arose. Although the PRI did not tolerate opposition, it initiated an ongoing period of peace and political stability in Mexico. While Mexico was struggling toward peace, however, the rest of the world was on the brink of war.

MAIN IDEA

Summarizing

D What were Obregón's accomplishments?

SECTION

4

ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

- Antonio López de Santa Anna • Benito Juárez • *La Reforma* • Porfirio Díaz • Francisco Madero • "Pancho" Villa • Emiliano Zapata

USING YOUR NOTES

2. Which leader do you think benefited Mexico most? Why?

Leader	Major Accomplishment

MAIN IDEAS

3. In what ways was Santa Anna a typical caudillo?
4. How did Porfirio Díaz change the direction of government in Mexico?
5. How were "Pancho" Villa and Emiliano Zapata different from other Mexican revolutionary leaders?

CRITICAL THINKING & WRITING

6. **MAKING INFERENCES** Why might Benito Juárez's rise to power be considered surprising?
7. **ANALYZING CAUSES** Why did Villa and Zapata turn against Madero?
8. **SUPPORTING OPINIONS** The revision of Mexico's constitution is considered revolutionary. Do you agree with this characterization? Why or why not?
9. **WRITING ACTIVITY** **REVOLUTION** Juárez's motto was "Liberty, Order, and Progress." Díaz's slogan was "Order and Progress." Write an **expository essay** explaining what this difference in goals meant for the people of Mexico.

CONNECT TO TODAY DESIGNING A CAMPAIGN POSTER

Conduct research on the Institutional Revolutionary Party (PRI) today, particularly its political platform. Use your findings to design a **campaign poster** for the PRI in an upcoming election.

Chapter 28 Assessment

TERMS & NAMES

For each term or name below, briefly explain its connection to the changes in global power between 1800 and 1914.

1. Opium War
2. Boxer Rebellion
3. Meiji era
4. Russo-Japanese War
5. Monroe Doctrine
6. Spanish-American War
7. Benito Juárez
8. Porfirio Díaz

MAIN IDEAS

China Resists Outside Influence Section 1 (pages 805–809)

9. Why was China traditionally not interested in trading with the West?
10. Although Guangxu's effort at reform failed, what changes did it finally set in motion?

Modernization in Japan Section 2 (pages 810–815)

11. What events caused Japan to end its isolation and begin to westernize?
12. What were the results of Japan's growing imperialism at the end of the 19th century?

U.S. Economic Imperialism Section 3 (pages 816–821)

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

Turmoil and Change in Mexico Section 4 (pages 822–827)

15. What were the major causes of tension between the Mexicans and the American colonists who settled in Texas?
16. What roles did Francisco "Pancho" Villa and Emiliano Zapata play in the Mexican Revolution?

CRITICAL THINKING

1. USING YOUR NOTES

On a time line, indicate the major events of Santa Anna's military and political career in Mexico. Why do you think he was able to remain in power for so long?



2. MAKING INFERENCES

Do you think that Emperor Guangxu would have been able to put his reforms into practice if the Dowager Empress Cixi had not intervened? Why or why not?

3. COMPARING

CULTURAL INTERACTION How do Japan's efforts at westernization in the late 1800s compare with Japan's cultural borrowing of earlier times?

4. EVALUATING COURSES OF ACTION

REVOLUTION Consider what you have learned in this and other chapters about Latin American colonial history and about how countries undergo change. What are the pros and cons of using both military strategies and peaceful political means to improve a country's economic, social, and political conditions?

VISUAL SUMMARY

Transformations Around the Globe

FOREIGN INFLUENCE

China

- Fails to prevent Britain from pursuing illegal opium trade
- Deals with internal unrest during almost two decades of Taiping Rebellion
- Attempts to build self-sufficiency during 1860s in self-strengthening movement
- Violently opposes foreigners in 1900 Boxer Rebellion
- Begins to establish constitutional government in 1908

Japan

- Signs 1854 Treaty of Kanagawa, opening Japanese ports to foreign trade
- Modernizes based on Western models during Meiji era (1867–1912)
- Fights 1894 Sino-Japanese War to control Korea
- Wages 1904 Russo-Japanese War to control Manchuria
- Annexes Korea in 1910

Latin America

- Depends on exports to fuel economy
- Receives much foreign investment
- Gains U.S. military support in 1898 Spanish-American War
- Becomes crossroads of world trade when U.S. completes Panama Canal in 1914

Mexico

- Fights to hold Texas territory from U.S. colonialism (1835–1845)
- Tries to establish a national identity in the early 1850s under Benito Juárez's *La Reforma*
- Overcomes French occupation in 1867
- Stages the Mexican Revolution in 1910

STANDARDS-BASED ASSESSMENT

Use the excerpt—which deals with changes made during the Meiji era in Japan—and your knowledge of world history to answer questions 1 and 2.

PRIMARY SOURCE

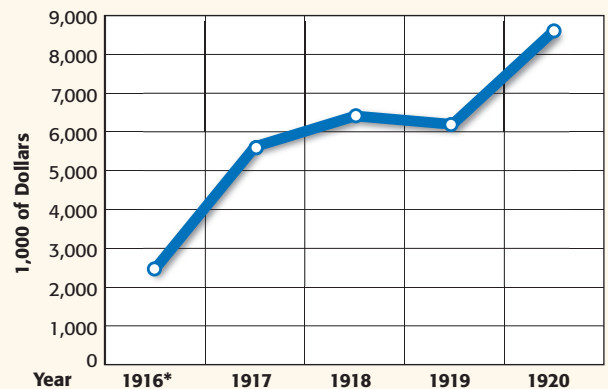
In the second and third years of Meiji, the demand for foreign goods remarkably increased. Those who formerly looked upon them with contempt changed their minds and even dressed in foreign clothes. Our males adopted the European style. They put on fine tall hats instead of wearing large [queues] on their heads, and took to carrying sticks after discarding their swords. They dressed in coats of the English fashion and trousers of the American. They would only eat from tables and nothing would satisfy them but French cookery.

Tokyo Times, 1877

1. According to the excerpt, what happened in the second and third years of Meiji?
 - A. The Japanese ate only French food.
 - B. The Japanese wore only European clothes.
 - C. The demand for foreign goods increased.
 - D. The demand for Japanese goods decreased.
2. Which statement best sums up the way the writer feels about the Japanese adoption of foreign ways?
 - A. The writer expresses no opinion of the matter.
 - B. The writer chooses to reserve judgment until a later date.
 - C. The writer feels that it is a good thing for Japan.
 - D. The writer feels that it is a bad thing for Japan.

Use the graph and your knowledge of world history to answer question 3.

Tolls Collected on the Panama Canal, 1916–1920



*Canal closed for about seven months because of rock slides.

Source: *Historical Statistics of the United States*

Tolls Collected

3. In which year did tolls collected on the Panama Canal first exceed \$6 million?
 - A. 1917
 - B. 1918
 - C. 1919
 - D. 1920

hmhsocialstudies.com TEST PRACTICE

For additional test practice, go online for:

- Diagnostic tests
- Tutorials
- Strategies

Interact *with* History

On page 804, you considered whether you would seek out or resist foreign influence. Now that you have learned how several countries dealt with foreign influence and what the results were, would you change your recommendation? Discuss your ideas in a small group.

FOCUS ON WRITING

EMPIRE BUILDING Write a **dialogue** that might have taken place between a conservative member of the Dowager Empress Cixi's court and an official in Emperor Mutsuhito's Meiji government. In the dialogue, have the characters discuss

- the kinds of foreign intervention their countries faced
- the actions their leaders took to deal with this foreign intervention

MULTIMEDIA ACTIVITY



Planning a Television News Special

On May 5, 1862, badly outnumbered Mexican forces defeated the French at the Battle of Puebla. Mexicans still celebrate their country's triumph on the holiday Cinco de Mayo. Working in a group with two other students, plan a television news special on how Cinco de Mayo is celebrated by Mexicans today. Focus on celebrations in Mexico or in Mexican communities in cities in the United States. Consider including

- information on the Battle of Puebla.
- an explanation of how and why Cinco de Mayo became a national holiday.
- images of any special activities or traditions that have become part of the celebration.
- interviews with participants discussing how they feel about Cinco de Mayo.



Mexico

Teotihuacán, established around 200 B.C., was the first great civilization of ancient Mexico.

At its height around the middle of the first millennium A.D., the “City of the Gods” was one of the largest cities in the world. It covered 12 square miles and was home to some 200,000 people. The Pyramid of the Sun, above, was the largest building in Teotihuacán.

For centuries after the fall of Teotihuacán, present-day Mexico was home to a number of great

empires, including the highly sophisticated Aztec civilization. The arrival of the Spanish in the early 1500s forever changed life for Mexico’s ancient peoples, and Mexican culture today is dominated by a blend of indigenous and Spanish cultures.

Explore the history of Mexico from ancient to modern times online. You can find a wealth of information, video clips, primary sources, activities, and more at hmhsocialstudies.com.



CLICK THROUGH
INTER / ACTIVITIES

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Mexico's Ancient Civilizations

Watch the video to learn about the great civilizations that arose in ancient Mexico.



The Arrival of the Spanish

Watch the video to learn how the arrival of the conquistadors led to the fall of the Aztec Empire.



Miguel Hidalgo's Call to Arms

Watch the video to learn about Miguel Hidalgo's path from priest to revolutionary leader.

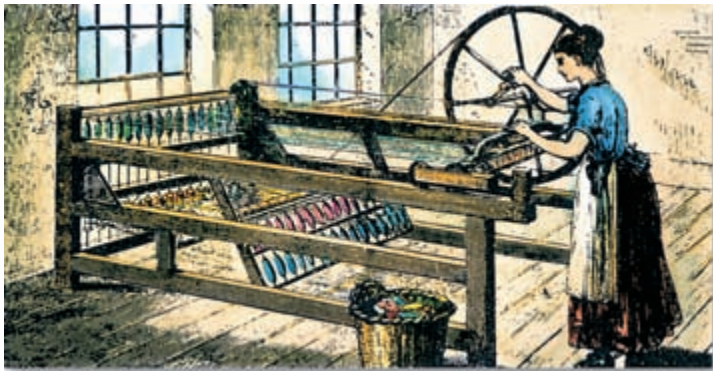


Mexico in the Modern Era

Watch the video to learn about the role of oil in the industrialization of Mexico's economy.

A Period of Change

The period from 1700 to 1914 was a time of tremendous scientific and technological change. The great number of discoveries and inventions in Europe and the United States promoted economic, social, and cultural changes. Use the information on these six pages to study the impact of scientific and technological changes.



▲ Spinning Jenny

Using James Hargreaves's invention, a spinner could turn several spindles with one wheel and produce many threads. Machine-made thread was weak, so it was used only for the horizontal threads of fabric.

Theory of Atoms

John Dalton theorized that atoms are the basic parts of elements and that each type of atom has a specific weight. He was one of the founders of atomic chemistry.

▲ Steamboat

Robert Fulton held the first commercially successful steamboat run. One advantage of a steamboat was that it could travel against a river's current. These boats soon began to travel rivers around the world.



▼ Flying Shuttle

A shuttle is a holder that carries horizontal threads back and forth between the vertical threads in weaving. John Kay's mechanical flying shuttle enabled one weaver to do the work of two.

Power Loom

Edmund Cartwright created the first water-powered loom. Others later improved on the speed and efficiency of looms and the quality of the fabrics.

▼ Steam Locomotive

In 1830, the first steam locomotive was put into operation in the United States. Besides passengers, locomotives could rapidly transport tons of raw materials from mines to factories, and manufactured goods from factories to consumers and ports.





Panama Canal

The Panama Canal shortened trips between the Atlantic and Pacific oceans by thousands of miles since ships no longer had to go around South America.

◀ Radioactivity

Marie Curie won the Nobel prize in chemistry for her (and her late husband's) discovery of the elements polonium and radium. Their work paved the way for later discoveries in nuclear physics and chemistry.

Antiseptics

Joseph Lister pioneered the use of carbolic acid to kill bacteria in operating rooms and later directly in wounds. The rate of death by infection after surgery dropped from about 50 to 15 percent.

Guglielmo Marconi's radio sent Morse code messages by electromagnetic waves that traveled through the air. It enabled rapid communication between distant places.

Radio

1865 1876 1879 1895 1903 1908 1911 1914

▼ Telephone

Alexander Graham Bell produced the first instrument that successfully carried the sounds of speech over electric wires. The telephone's design underwent a number of changes in its early years.

Airplane

The Wright brothers built the first machine-powered aircraft, which burned gasoline. The edge of the wing was adjusted during flight to steer.

Model T Ford

By using a moving assembly line, Henry Ford produced an automobile that working people could afford to buy.

Light Bulb

The light bulb that Thomas A. Edison and his staff made was first used in businesses and public buildings that installed small lighting plants. Cities slowly built the electrical systems needed to power lights.



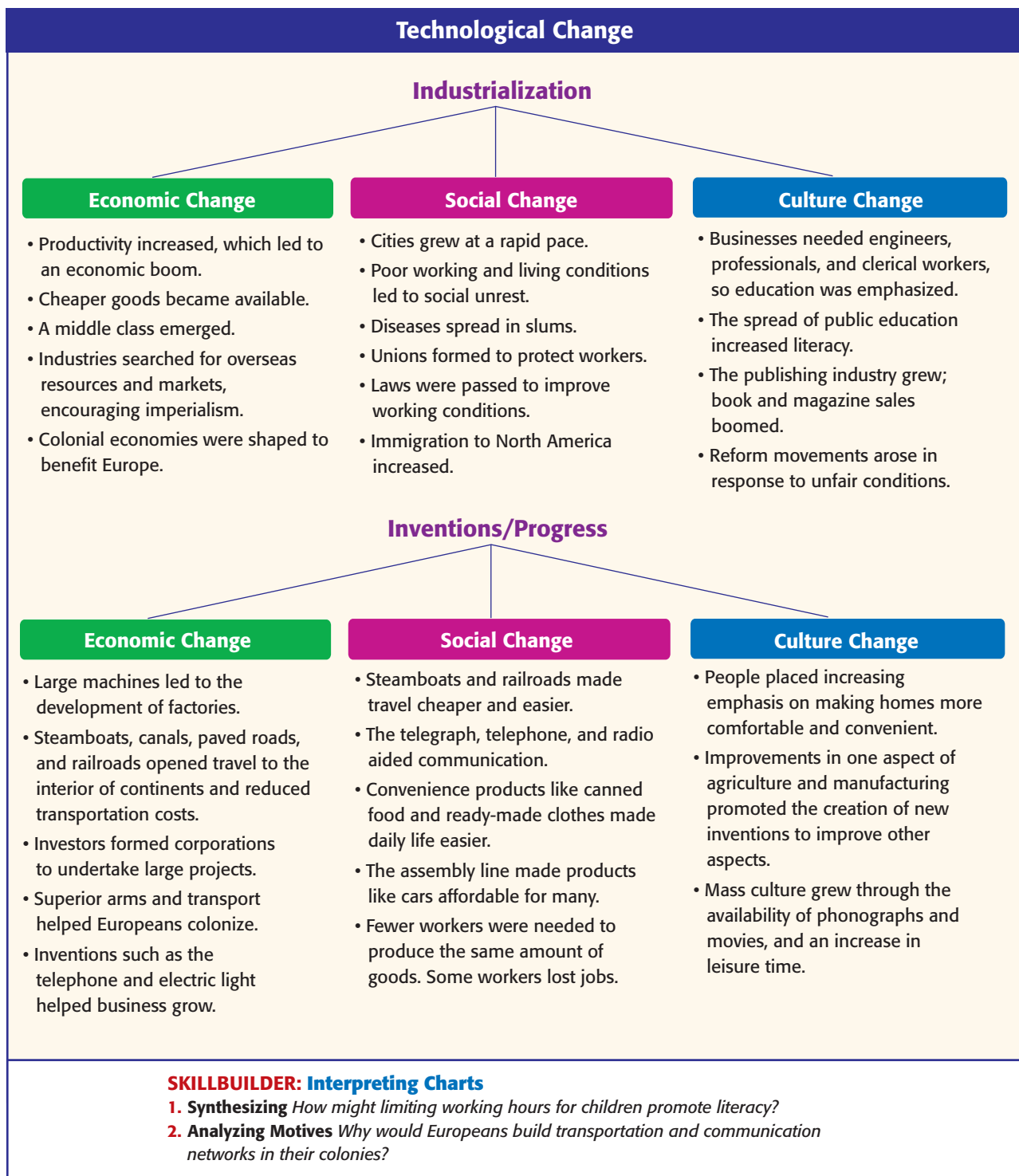
Comparing & Contrasting

1. How were the steamboat and the locomotive similar in their impact?
2. How did the scientific theory of John Dalton differ from Joseph Lister's discovery in terms of its impact on daily life?



Impact of Technological Change

Use the charts below, and the documents and photograph on the next page, to learn about some of the great changes technology produced.



Go online to listen to selected audio excerpts.

PRIMARY SOURCE

Child Workers in Textile Factory

Many jobs did not require skilled workers, so children were hired to do them because they could be paid lower wages than adults. Some industries also hired children because their small fingers could fit between the machinery or handle fine parts more easily than adult fingers could.



DOCUMENT-BASED QUESTION

Judging by the children's appearance, how generous were the wages they received? Explain your answer.

PRIMARY SOURCE

Impact of the Telephone

In this excerpt from "Thirty Years of the Telephone," published in September 1906, John Vaughn discussed how Bell's invention affected life in the United States.

Various industries, unknown thirty years ago, but now sources of employment to many thousands of workers, depend entirely on the telephone for support. . . . The Bell Companies employ over 87,000 persons, and it may be added, pay them well. . . . These figures may be supplemented by the number of telephones in use (5,698,000), by the number of miles of wire (6,043,000) in the Bell lines, and by the number of conversations (4,479,500,000) electrically conveyed in 1905. The network of wire connects more than 33,000 cities, towns, villages, and hamlets.

DOCUMENT-BASED QUESTION

What were some of the effects of the invention of the telephone?

SECONDARY SOURCE

How Technology Aided Imperialism

In this excerpt from the book *Guns, Germs, and Steel*, Jared Diamond related an incident to show how technology helped Europeans conquer other lands.

In 1808 a British sailor named Charlie Savage equipped with muskets and excellent aim arrived in the Fiji Islands. [He] proceeded single-handedly to upset Fiji's balance of power. Among his many exploits, he paddled his canoe up a river to the Fijian village of Kasavu, halted less than a pistol shot's length from the village fence, and fired away at the undefended inhabitants. His victims were so numerous that . . . the stream beside the village was red with blood. Such examples of the power of guns against native peoples lacking guns could be multiplied indefinitely.

DOCUMENT-BASED QUESTION

How did guns give Europeans an advantage over native peoples?

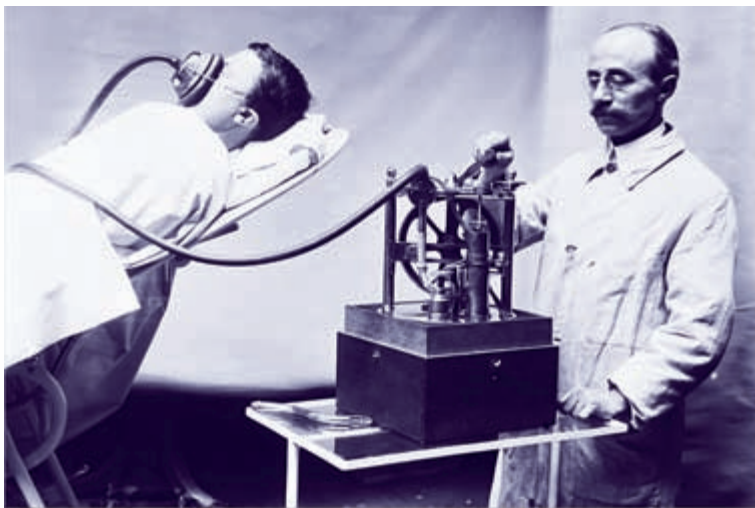
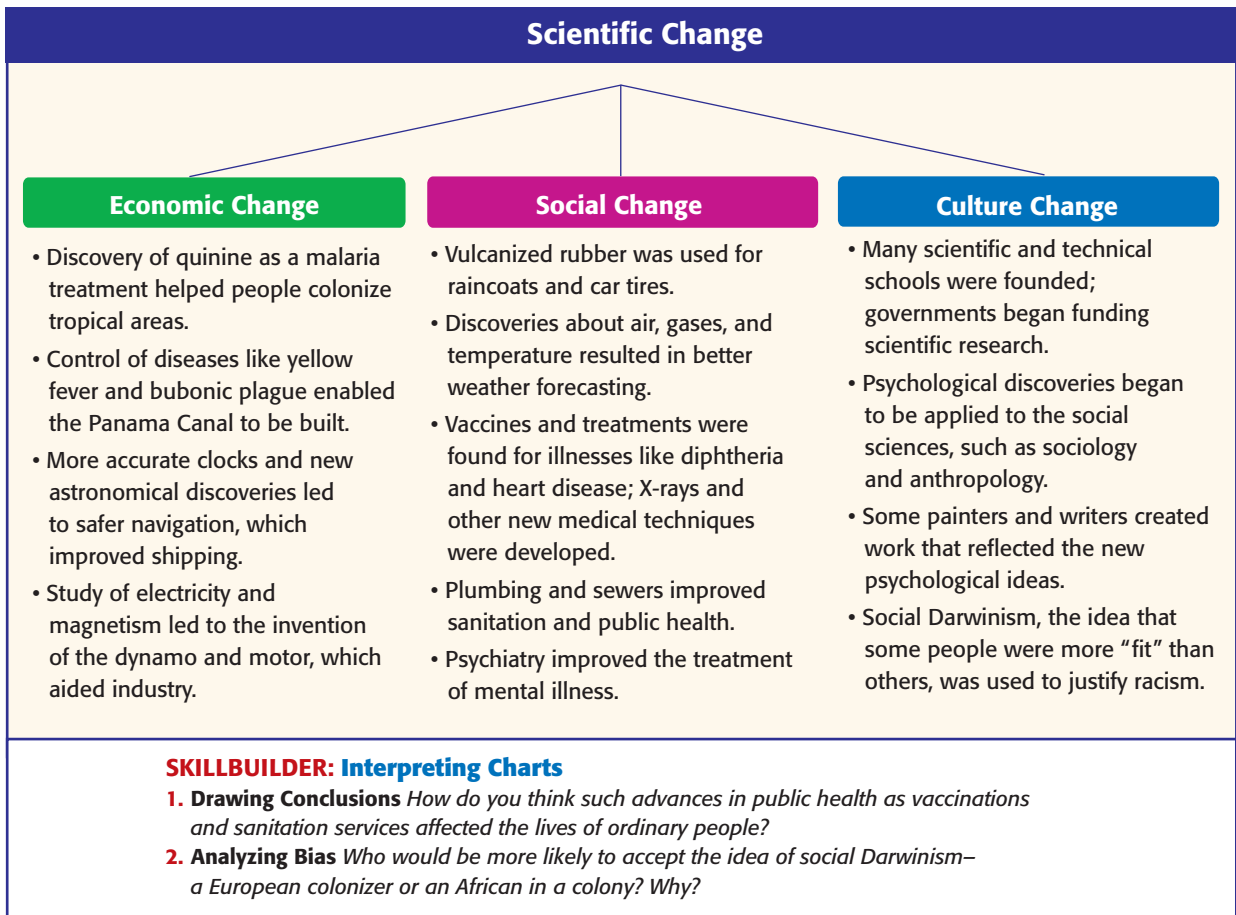
Comparing & Contrasting

- 1. Reread the passage by John Vaughn and then compare it with the information on the chart. What could you add to the chart based on this passage?
2. Does the photograph of factory workers confirm or contradict the information on the chart? Explain.



Impact of Scientific Change

Many scientific discoveries resulted in practical applications that affected daily life. Other discoveries increased our understanding of the way the universe works. Use the information on these two pages to explore the impact of scientific change.



PRIMARY SOURCE

Chloroform Machine

The person with the mask is receiving the anesthetic chloroform. By removing pain, anesthetics enabled doctors to perform procedures—such as surgery—that would have been difficult for the patient to endure.

DOCUMENT-BASED QUESTION

How did practical inventions, like the chloroform machine, contribute to medicine and other sciences?

Go online to listen to selected audio excerpts.

PRIMARY SOURCE

Smallpox Vaccination

This newspaper engraving shows a Board of Health doctor administering the smallpox vaccine to poor people at a police station in New York City.

DOCUMENT-BASED QUESTION

Why would public health officials especially want to carry out vaccination programs in poor neighborhoods?



SECONDARY SOURCE

Impact of Scientific Research

This passage from *The Birth of the Modern* by Paul Johnson discusses the far-reaching results of Michael Faraday's experiments with electromagnetism in the 1820s.

[By 1831, Faraday] had not only the first electric motor, but, in essence, the first dynamo: He could generate power. . . . What was remarkable about his work between 1820 and 1831 was that by showing exactly how mechanical could be transformed into electrical power, he made the jump between theoretical research and its practical application a comparatively narrow one. The electrical industry was the direct result of his work, and its first product, the electric telegraph, was soon in use. The idea of cause and effect was of great importance, for both industry and governments now began to appreciate the value of fundamental research and to finance it.

DOCUMENT-BASED QUESTION

How did Faraday's work affect society in the long term?

Comparing & Contrasting

1. In your opinion, was there more economic progress or social progress during the period 1700 to 1914? Use information from the charts on pages 832 and 834 to support your answer.
2. Consider the impact of medical advances and the idea of Social Darwinism on imperialism. How were their impacts alike?

EXTENSION ACTIVITY

Research a more recent scientific or technological change, such as the development of computer chips, plastics, the Internet, or space travel. Make a chart like the one shown on page 834 listing the economic, social, and cultural changes that have resulted.