READING 2

Candice Goucher, Charles LeGuin, Linda Walton, *In the Balance: Themes in Global History* (Boston: McGraw-Hill, 1998), selections from chapter 17, "The Tentacles of Empire: The New Imperialism and New Nationalism in Asia, Africa, and the Americas."

Abstract: This essay explores the later stages of imperialism from Africa to Asia and the Americas.

The New Imperialism in Africa

Expansion fueled by capitalist industrialism and nationalism brought previously unsubjugated lands under European control during the nineteenth century. At its height the British Empire alone consisted of over a quarter of the world's land mass and people. By 1914 Europe together with its colonial possessions occupied more than 80 percent of the globe. The conquest of Africa provided perhaps the clearest example of what is sometimes called the "new imperialism," an era roughly beginning in Africa in the 1880s and continuing into the twentieth century.

European Imperialism and the Berlin Conference

Africa, which Europeans called the "dark continent" because its interior was still virtually unknown to them, was colonized by conquest from one end of the continent to the other. The British spread southward from Egypt, where they had established themselves by 1875 and assumed a protectorate (controlling authority) by 1882, while they moved northward from Cape Colony in South Africa, which they had held since 1815. A column of British-claimed territories that stretched up the entire east coast of Africa was interrupted by German acquisition of East African territory in 1885.

The trans-Atlantic slave trade had been central to capitalist development and growth in West and Central Africa. Even after the abolition of slavery by European powers beginning about 1807, African societies continued and, in some instances, even deepened their dependence on slave labor. The slave trade era was followed by the era of "legitimate commerce," a period between about 1800 and 1870 during which African-European economic enterprises were forced to find other products to replace illegal human cargoes. In almost all instances the products sold to international markets were agricultural or forest products grown or collected for export to Europe. They included timber, rubber, palm oil, minerals, and ivory. Even when slaves were no longer exported, slavery and other forms of coerced labor remained essential to the production and transport of commodities. The era has also been termed a period of informal empire, suggesting that the

economic relations characteristic of the subsequent formal empires of the colonial era were well underway by the end of the nineteenth century.

The Berlin Conference

At the Berlin Conference in 1884–1885, European powers and the United States met to protect their "spheres of influence" (areas of special economic and political interests) and to establish mechanisms for making new territorial claims. The scramble for African territory was underway. An earlier catalyst for the scramble for territories came from King Leopold II of Belgium (r. 1865–1909). Motivated by greed and ambition to expand the wealth and territory of his small European kingdom, Leopold undertook what he called a crusade to acquire the Congo Free State (later, Zaire). The relatively swift imposition of European colonial rule in Africa following the Berlin Conference also needs to be understood against the backdrop of several centuries of the Atlantic slave trade, the rise of an African merchant class, and the penetration of merchant capital prior to 1900. These forces undermined the earlier systems of authority on the continent and prevented African societies from dealing with the European presence in any unified way.

European Territorial Claims in Africa

The distribution of European-dominated territory on the West and Central African coast was more scattered than other regions, and European trade competition, especially between Britain, France, Germany, and Belgium was more fierce. Before the outbreak of World War I (see Chapter 18), the lower Niger valley had become Nigeria, a British protectorate, as had Sierra Leone and the Gold Coast, but German imperialist activity checked British interest in the coast above Cape Colony. A German protectorate, established over Southwest Africa in 1884, was a sharp blow to British designs. Despite such frustrations, Great Britain had staked out claims to a great share of African territory.

French territorial acquisitions in Africa were equally staggering. From about 1830, the French began to re-create the empire they had lost in 1763 (when they surrendered Canada and India to Britain) with a campaign to conquer Algeria. Using piracy as an excuse, the French began their African expansion with an expedition of troops to Algeria in 1830, leading to a lengthy and violent assault (termed a "pacification" by the French) that resulted in its mid-century integration as three departments of metropolitan France. France, in claiming lands and peoples previously unclaimed by Europeans, was setting the pattern for a general European imperialist race that resumed after 1870. The annexation of Algeria was an inaugural step toward realizing a French dominance of Africa north of the equator. The next step was the annexation of Tunisia (1881). In 1904 an agreement with

Great Britain provided English support for rounding out French holdings in northwest Africa by establishing a protectorate over Morocco (1912), despite German opposition.

In equatorial Africa the French established themselves on the Kongo, and in West Africa in Senegal. As early as 1885 these colonies were linked across the Sahara to French North African territories, thus consolidating the vast African territory north of the equator and west of Egypt and the Sudan. With French acquisition of the island of Madagascar in 1896, their African territories exceeded those of Great Britain, though the colonies most strategic to the French lay along the Mediterranean shore of North Africa, closest to France itself.

What the British and French left unclaimed in Africa was taken by the Germans, Italians, Belgians, Portuguese, and Spanish. Taken together, these holdings meant that only two areas of Africa remained unclaimed by Europeans by the time of the outbreak of World War I: Liberia, a territory that was partly settled by repatriated African and African-American slaves from the Americas and virtually a dependency, however unacknowledged and ignored, of the United States; and Ethiopia, which retained independence only by defeating the 1896 Italian effort at conquest. This comprehensive European hegemony over Africa, once completed, proved to be surprisingly short-lived, though no one would have supposed so before World War I.

The Economic Advantages

In some important ways the era of colonial rule was fundamentally different from what had preceded it. Before colonial rule Africans were independent, if not always equal, trading partners. After colonial rule, this African economy became a European-dominated economy. Under post–Berlin Conference colonial rule, African political economies controlled by colonial powers — such as Great Britain, France, or Germany — were rapidly establishing Western-based capitalism that would inevitably reduce the power and economic opportunity of the African participants. While production remained largely in Africa hands, Europeans controlled colonial credit and trade tariffs. Few Africans prospered during this era; colonial controls hampered the development of free enterprise, and European governments offset the high costs of extracting raw materials and transporting them to European-based manufacturing centers by providing price supports.

European economic and political hegemony depended on the development of the colonial system. African colonies supported many European industries that otherwise could not have been profitable. For example, the textile industry of France depended on the cheap cotton supplied by French West African colonies to remain competitive with technologically more advanced manufacturing in Great Britain and the United States. The other side of the

colonial relationship was of course the development of markets in Africa. African markets continued to support the patterns of Western industrial growth as Africans became dependent consumers of European textiles, iron pots, agricultural implements, soap, and even foodstuffs.

Political Conquest

There was another way in which the industrial achievements of the colonizers wrought a hefty price from the colonized: political independence was lost as one territory after another was conquered. Although post–Berlin Conference colonial rule followed decades and even centuries of involvement, its imposition was swift. The use of military force as necessary everywhere to establish and maintain European control of African territories. The European tools of empire, from quinine (to treat malaria) to the steamboat, railway, and machine gun, all enabled the penetration and conquest to be complete. In some places, such as the Benin kingdom of Nigeria in 1897, Europeans forcibly removed the local rulers (the *oba* and his chiefs) from power and sent them into exile. Cultural treasures that expressed power and recorded the Benin kingship's historically sanctioned legitimization were stolen and taken to Europe, where they were auctioned to offset the costs of the expedition. Accordingly, the Benin bronzes and ivories are found today in world museums, from Berlin to London and New York.

The Colonial System

The colonial systems differed in strategy and form under British, French, Belgian, German, and Portuguese rule. The British policies were termed "indirect rule," and they required British district officers to be supported by local chiefs and puppet administrators drawn from local circles. French rule was termed "direct rule" and utilized the French themselves as colonial officials in the field; under French assimilationist policy, Africans who adopted the culture (language, dress, and lifestyle) of French nationals were allowed to become French citizens. The repercussions of such distinctions had a lasting impact on the relations between the former colonial power and its colonized peoples.

The purpose of the colonial system, regardless of the type of rule, was exploitative, seeking to harness the resources of land and people for the benefit of the metropole (the European capitals). Profits from the unequal and often brutally enforced economic relations were returned to Europe while African markets were created to consume European manufactured goods. Colonial laws, imposed by force, invaded peoples lives, from their rights to work and live in certain places and travel freely to their rights to read or speak their own languages or practice their traditional religions.

Although many Europeans complained bitterly about the costs of the colonial enterprise (the British author Rudyard Kipling called this the "white man's burden"), some segments of European and other industrialized societies were enriched by their colonial ties. For example, some French industries were absolutely dependent on the cheap raw materials, labor, and consuming markets of their colonial partners. Large multinational concerns eventually emerged from the colonial enterprises, including Lever Brothers, Lloyds of London, and many other companies that began as commercial organizations during the slave trade and the subsequent era of legitimate commerce.

African Resistance to the New Imperialism

Conquest and exploitation through the use of force brought about immediate resistance in all parts of the colonized continent. In 1890 in southern Tanganyika, the main opponents were the German commander Hermann von Wissman and Macemba, ruling chief of the Yao people. When Wissman demanded subordination by Macemba, the African ruler replied by way of a letter written in Kiswahili:

> I have listened to your words but can find no reason why I should obey you—I would rather die first… I look for some reason why I should obey you and find not the smallest. If it should be friendship that you desire, then I am ready for it, today and always; but not to be your subject, that I cannot be. If it should be war you desire, then I am ready, but never to be your subject. I do not fall at your feet, for you are God's creature just as I am. I am sultan here in my land. You are sultan there in yours. Yet listen, I do not say to you that you should obey me; for I know that you are a free man. As for me, I will not come to you, and if you are strong enough, then come and fetch me.

Macemba's reply was characteristic of a great many African responses. Some resistance also amounted to revolts of despair over the dispossession of lands or European brutalities.

For example, the Maji Maji rebellion covered a large area of central and southern Tanganyika in 1906, where labor coercion by German colonizers was particularly intense. The movement was an attempt to overcome the superior military technology of the Germans. Resisters sprinkled their bodies with protective magic water known as *maji-maji* and believed to turn the enemy's bullets into water. The use of spiritual beliefs helped foster African unity, and although thousands were killed by machine gun fire, the Germans ultimately reduced their use of violence in order not to provoke another mass uprising.

Other kinds of resistance were more successful, long-term strategies that undermined colonial rule and sometimes targeted the collaborating African elites. About the same time that German East Africa was threatened by the Maji Maji, the British were facing uprisings in Nigeria. Using the traditional

jihad or holy war waged against nonbelievers from Islamic regions, peasants challenged British colonial authority.

With no technological match for advanced European weaponry, the failure of African resistance was endemic, until well into the twentieth century, when the educated elite and masses eventually found common political and sometimes even nationalist grounds. The one exception to the pattern of extracting raw materials without furthering local African processes of industrialization occurred in South Africa, the southern-most territory of European settlement on the continent and the site of persistent African resistance. Even in South Africa, colonial development had uneven benefits for the colonizer and the colonized.

Imperialism and Resistance in South Africa

In South Africa, European settlers claimed African territories that they eventually considered as their own homelands. There were European settlers in other parts of the continent, the Kenyan highlands, for example, but only in South Africa had the European presence taken root as early permanent settlement and in such a peculiar way. Isolated from their European roots and marginalized by shifting global relations, these "white" settlers—the Afrikaners—found themselves competing with Africans and European empires for control over territory and resources. They were descendants of early Dutch settlers who began arriving only in the seventeenth century; by the nineteenth century they displayed a language and culture born of centuries of interaction with African populations and began to develop a cultural nationalism that would eventually turn political.

Excluded from the same political process, Black South Africans created separate nationalist movements, which shared some tactics and visions with the anticolonial revolutions in neighboring African territories. The Black South African nationalist leader, Anton Lembede, once repeated a quote that he attributed to Paul Kruger, the father of the white Afrikaner state. Lembede said: "One who wants to create the future must not forget the past." It is interesting, but not surprising, given the role of history in shaping the unique landscape of people and power, that the two leading figures in parallel nationalist movements in the same land should have both invoked a reverence for the historical past. However, Lembede and Kruger probably would have disagreed on the meaning of that past.

Competing Histories

For the Afrikaner the history of South Africa began in 1652, the year of the first permanent settlement in the Cape. From that century onwards, their history took on mythic proportions. With motives they considered of divine origin and therefore pure (the claiming of lands by God's chosen people) and

with their God's protection, the descendants of these early European settlers found themselves pitted against two traditional sets of enemies: the British, who acquired control over Cape Colony in 1815, and the Africans. In the Afrikaner view of history, the central saga is the so-called Great Trek, the era of the Afrikaner migration northward out of the Cape when both sets of enemies opposed the expansion of the Afrikaner state.

From the African point of view, the central theme of recent history—merely the last several hundred years out of many millennia—was white conquest and the expropriation of African lands. The quarrels between the British and the Afrikaner Boers were of little concern. What both African and Afrikaner historical traditions might agree upon is the critical importance of the century between about 1790 and 1890. This was a period of devastating transformations in African and European societies coexisting in the southern-most part of the African continent.

By the end of the eighteenth century, the players in the historical drama that was about to unfold were in place or, as in the case of the expanding farmers of Dutch descent (*trekboers*), moving into place. The geography of southern Africa had determined to a large extent the nature of population movements and the ultimate distribution of pastoralists, mainly Boers moving north and eastward from the Cape Colony, who were blocked by mountains and attracted by pasturelands for their cattle. To the west expanding populations of Sotho speakers spread across the plateau in search of pasture lands, from the Limpopo to the Orange rivers. The Tsawa were pushed by the farmers against the fringes of the Kalahari Desert in the west.

Zulu Imperialism

The ecological balance that most Africans had attained through stockkeeping and mixed farming, including the cultivation of grains, was a delicate, if successful one. In Zululand, an area well-suited to its cattle-keeping cultivators, a system of exploitation of native grasses had developed, whereby the configuration of grass types available in different seasons and at different elevations affected the development of political and economic units. Territorial expansion took place to acquire seasonal pasturelands.

Nguni Militarization and Resistance

The Nguni were one of a number of Bantu-speaking peoples whose ancestors had originated thousands of years earlier in the region of the Nigerian-Cameroon border of West Africa. Arriving in southern Africa during the Early Iron Age (by about 500 c.e.), these farmers with cattle had become the dominant group. Their expansion, often at the expense of herders, hunters, and gatherers, had resulted in the growth of villages and towns and the increasingly stratified society of the 1700s.

The traditional methods for dealing with ecological constraints—population movements in response to cycles of environmental degradation, concentrated grazing, overpopulation, shortages of resources and land—depended on the availability of pastures over the next hill. Famine and drought, if combined with overpopulation, could result in a crisis. Such was the time of *Madlathule*, a famine that devastated Zululand from the 1790s until about 1810.

Shaka and the Zulu Kingdom

The first half of the nineteenth century saw the rise and consolidation of the great Zulu kingdom. That the centralization of authority and increased expansionary efforts occurred following the great famine is not coincidental. During the famine larger villages were needed to defend grain storage from the attacks of marauders. The control of cattle over a larger area was also necessary to compensate for the decrease in palatable grasses. One great revolutionary leader known as Shaka (r. 1818–1828) exploited the crisis. Of enormous importance was Shaka's control over three factors of production: cattle, women, and marriage.

Some of the tremendous changes of Shaka's time were inevitable. Revolutions in military tactics (the use of a new weapon, the short stabbing spear, and a new formation, the cow-horn formation) included the conversion of the traditional age-grade system into a military organization. The system was an association of similar-aged males, who from boyhood to manhood created regiments in a unitary, nationalized army. Social changes also made the chief more powerful.

Through his control over marriage (and thus population and production), Shaka was able to revolutionize Zulu social relations. Marriage practices had potentially important economic and political consequences. As social and political transactions, marriages transferred wealth and created strategic alliances between families. Shaka, by delaying the marriage of his young soldiers, was able to control the movement of a significant proportion of the kingdom's power and production. With marriages delayed and warfare increased, Shaka was able to resolve the population pressures that the Madlathule had induced. To his enemies Shaka became a beastly and harsh ruler. He became a legend in almost every version of southern African history.

The Impact of the *Mfecane*

The era after the famine came to be called the *Mfecane*, the "time of the crushing." The forces and peoples of the *Mfecane* transformed the region, and societies that could not resist Shaka's armies became starving, landless refugees. Survivors were highly militarized. Small political units were no longer viable; populations were dramatically redistributed across southern

Africa. The Great Trek era (1836–1854) of Afrikaner history was the collision of Boer expansion with these forces.

The mid-nineteenth century presents a momentary balance of power: the independent states of the Zulu and other Africans, independent Boer "republics" (not much more than lumps of settlements), and British control over two southern African colonies, Cape and Natal. The *Mfecane* had left large unpopulated areas vulnerable to European imperialists. This was the eve of the country's mineral revolution: the European discovery of diamonds and gold in 1868 and 1886 dramatically altered the role of land and capital.

Gold, Diamonds, and the Mining Industry

Mining spurred significant economic changes as southern Africa, unlike the rest of the sub-Saharan Africa, underwent the early stages of an industrial revolution. South African capitalist development intensified with the recognition of extensive mineral resources. British capitalists, backed by foreign finance and technology, succeeded in gaining the mining territories. The sudden influx of people and capital transformed the areas of the Transvaal and Orange Free State where the mining settlements were attracting a large number of immigrants and investments and creating urban crises. The land on which the gold and diamonds were situated had been easily expropriated from Africans. More complicated was the problem of attracting labor to the mines while industrializing the operations.

Eventually, the economy developed a dependence on cheap and temporary unskilled labor to work in the mines. Legislative initiatives in the colony and the ravages of the Anglo-Boer conflicts at the end of the century speeded up the process by which Africans and their labor were brought under control. Initially both African and Afrikaner were attracted by the opportunities for employment. The wide disparity between the earnings of skilled and unskilled laborers in the mining sector came to be entrenched along racial lines, as discrimination and color prejudice were used to give white workers advantages. Between 1913 and 1922, the government imposed a series of discriminatory legislation. For example, the Natives Land Act (1913) prevented Africans from acquiring certain lands and this restriction and later laws helped create an unsettled migrant labor pool. Thus industrialization set the standard for racial discrimination and for the racist presumptions that white, rural competitors (Afrikaners) brought to the new urban setting of the mines.

The Anglo-Boer War

Conflicts over land and ideology erupted between farmers and capitalist interests. Known as the Anglo-Boer War (1899–1902), this period of conflict witnessed the birth of Afrikaner nationalism, which was based on a sense of shared religion and historical experience of the Boers. The civil religion and

sacred history that came to fruition in the twentieth century was first expounded by Paul Kruger, an Afrikaner leader in the Anglo-Boer conflict. Kruger was a Voortrekker, one who had been a part of the expansion from the Cape, and he was president of the South African Republic between 1881 and 1900. His thinking was influenced by the theology of John Calvin, whose emphasis on collective individualism, encouraging individual action on behalf of the collective good of the group, was useful in Kruger's development of nationalist sentiment among Afrikaner settlers. Afrikaner nationalism became the struggle among the white people of South Africa for political control.

In contrast to the Afrikaner "whites," who were a diverse and widely differentiated population of landowners, rich commercial farmers, professionals, and impoverished, unskilled workers, the Africans for the most part remained peasants and pastoralists for whom wage labor was occasional. After the 1880s and under the influence of capitalist economic forces, rural and urban whites sought and received privileged status. Parallel to this movement were the expropriation of African land and the incorporation of African labor into the South African process of industrialization.

The Anglo-Boer War was basically about who should dominate South Africa: the British, who controlled mining, or the Boers, who controlled politics. The conflict temporarily halted mining and capitalist development. When Africans resumed mining in post-war South Africa, the unity of whites resulted in black political exclusion. The blacks of South Africa began to feel the contradictions of white domination and their own increased economic participation. African political movements seized the opportunities provided by the forces of urbanization, industrialization, and the very tools of the European empire: western-style education and Christianity. In the end the tools would be turned against the imperialists here as elsewhere in Africa, where broad nationalism transcended both individual and ethnic differences.

Imperialism and Colonialism in Southeast Asia

The upheavals of the French Revolution and Napoleonic eras brought change to such distant parts of the globe as Southeast Asia, where the Dutch had dominated the East Indies while indigenous monarchies retained control on the Southeast Asian mainland. Conflicts between the British and Dutch erupted in the wake of the Napoleonic wars, resulting in a division of control between the two European powers in the East Indies. In 1819 the British Sir Thomas Stamford Raffles founded the free trade port of Singapore at the southern tip of the Malay peninsula, thus breaking the Dutch trading monopoly on the Straits of Malacca. In the 1840s the British James Brooke became the Rajah of Sarawak on the island of Borneo, ruling much as a native monarch.

French and British Colonies

In the late nineteenth century, France claimed colonial possessions on the mainland of Southeast Asia, known as French Indo-China. French interest in Southeast Asia dated from the beginning of the century when volunteers from the French navy helped put down a Vietnamese rebellion. French Catholic missionaries had gained enough converts that the Vietnamese emperor Minh-Mang's (r. 1820–1841) pursuit of anti-Catholic policies along with French commercial interests led to French intervention in Vietnam. In 1858 the French occupied Saigon, which they intended to use as a port to compete with the British ports of Hong Kong and Singapore. French territorial claims throughout mainland Southeast Asia continued into the late nineteenth century. Britain acquired control of Burma (1886) in connection with its colonial domination of India and Ceylon.

Thai Independence

Only Thailand retained its independence, though at the cost of much territory. The British and Thai governments signed a commercial treaty in 1826, after which British influence increased. On his deathbed the Thai king Rama III warned his successor that "there will be no more wars with Vietnam and Burma. We will have them only with the West." According to Rama III, the British defeat of China in the Opium War signaled the end of an era and the beginning of a new international order.

Ruling as Rama IV, the former Buddhist monk King Mongkut (r. 1851–68) followed the advice of his predecessor and signed treaties with Britain and France. He also brought European advisers to his court to assist in carrying out legal, financial, and military reforms to modernize the country. The era of Mongkut's Western-style reforms was immortalized and romanticized in the musical *The King and I*, based on the account of an Englishwoman brought to tutor the king's children. Mongkut's son, Chulalongkorn (Rama V), continued the reforms of his father, especially encouraging Western education.

In 1893, though Thailand remained independent, the threat of European imperialism encouraged further political reforms. Disputes with France, whose colonial possessions bordered Thai territory, ended in the French takeover of Thai-controlled Cambodia and a portion of Laos. In 1904 and 1907 more Thai territory was ceded to the French, and in 1909 the British took over two Thai-controlled states on the Malay peninsula.

Imperialism and Nationalism in East Asia

European imperialism played a major role in the transformation of East Asia from the late nineteenth through the early twentieth century. European expansion into East Asia was fueled by economic and commercial growth that drew the attention of European merchants to the potential trading wealth

of China and, to a much lesser extent, Japan. Japan alone retained both political and economic independence from Western powers, although the forces of Western imperialism precipitated change there as well. Unlike other parts of the world, however, neither China nor Japan were directly colonized by Western powers, although China was subject to substantial economic exploitation and political domination through the "spheres of influence," territories where individual European powers exercised commercial rights and political influence during the late nineteenth century.

China and the West: The Opium Wars and the Taiping Rebellion

From the creation of the Canton system (1757), which restricted European traders to the port of Canton in order to limit and control their activities, until the 1830s, the balance of trade was in China's favor. British merchants plied their trade in tea, supplying the growing national market at home in Britain and paying for this and other goods, such as silks and spices, with silver. Silver was the basis of the Chinese monetary system and thus desirable as payment for Chinese goods. With the loss of access to sources of silver in the Americas, when the Atlantic seaboard colonies revolted against British rule in the late eighteenth century, British merchants had trouble paying in silver for the products they wanted. By the 1830s they turned to the illegal importation of opium produced in Bengal in British India to support their China trade.

The opium trade had a devastating impact on Chinese society and the Manchu Qing (1644–1911) government sought to control it. In 1838 the imperially appointed Commissioner Lin Zexu (1785–1850) was dispatched to Canton to deal with the opium problem. The British refused to control the opium traffic, and in 1839 China and Britain engaged in armed conflict in the first Opium War (1839–1842). The humiliating defeat of China was documented in the Treaty of Nanjing (1842), which opened five treaty ports along the southeast coast, ceded the island of Hong Kong to the British, and established the concept of extraterritoriality, exempting foreign residents in the treaty ports from the rule of Chinese law. By the middle of the nineteenth century, missionaries, largely though not exclusively Protestant, had become active in the treaty-port cities; and with the conclusion of the second Opium War (1860), they began to establish missions in the Chinese hinterland as well as in coastal areas. Thus China was forcibly "opened" to Western trade and influence by the outcome of the Opium Wars.

The Taiping Rebellion

The Qing government's problems were not only with foreigners. China's population exploded dramatically in the nineteenth century, nearly tripling from approximately 150 million in 1500 to 430 million in the mid-nineteenth

century. Population pressures led to social and economic disruption and rebellions inspired by religious or ethnic disaffection coupled with socioeconomic crisis. The most significant of these was the Taiping Rebellion (1851–1864), which reflected not only the socio-economic strains connected to the Opium Wars, but also the influence of Western ideas, particularly Christianity, resulting from missionary activity.

The Taiping leader Hong Xiuquan (1811–1864) was influenced by Old Testament ideas in a Christian missionary pamphlet given to him in Canton, where he had gone to take the civil service examination. After failing the examination for the third time, Hong had hallucinatory visions that he was the younger brother of Jesus Christ and was destined to lead the Chinese people back to the true God. Gaining support from other disaffected and alienated groups in Chinese society whose livelihoods had been disrupted by the Opium Wars, Hong led his rebel followers to capture the former imperial capital of Nanjing in 1853, where they attempted to establish the Heavenly Kingdom of Great Peace, a utopian social and political order that reflected their ideology of communalism and egalitarianism. Their radical vision of the ideal society presented such a profound challenge to the prevailing Confucian social order that the Chinese elite rose up in defense of the Manchu government. The Taipings were finally defeated by imperial troops in 1864, and little of their vision was ever accomplished.

Despite their eventual suppression, the impact of the Taiping and other mid-nineteenth century rebellions was enormous; historians estimate that 20 million people lost their lives in connection with the Taiping Rebellion alone. In other ways, too, mid-century rebellions brought about important changes with long-term impact. The most immediate of these changes was the militarization of local society, the result of people arming themselves and creating militias to protect their lives and property from the ravages of rebellion, and the rise of provincial armies with only tenuous loyalty to the Manchu court.

"Self-Strengthening" and European Imperialism in China

In the late nineteenth century, provincial leaders, with the implicit approval of the imperial government, adopted Western technology in an effort to strengthen China in the face of proven Western military and technological superiority. The "self-strengthening movement" resulted in such things as the establishment of schools that taught Western languages and learning, particularly mathematics and science, and the building of arsenals and shipyards.

Many self-strengtheners believed they could adopt Western technology for practical use (*yong*) and retain Chinese values as the basis of their culture (*ti*). So Western learning was initially confined to mathematics and science

because they were of immediate practical use, and Western languages were studied only to enable Chinese to learn science and mathematics. But as the people learned Western languages, they also began to translate Western literary, political, and social writings. Yan Fu (1853–1921) translated the works of such major European thinkers as John Stuart Mill, Adam Smith, and Charles Darwin, and Chinese translations of Shakespeare and Charles Dickens were available by the turn of the century.

European Spheres of Influence

By the 1880s Western imperialism was making further inroads on Chinese territory, and by the end of the century most of China was a foreign "sphere of influence," a territory where foreign powers had special economic or political privileges. The Sino-French War in 1884–1885 was fought over competing territorial claims in China's southwestern border regions. The victorious French extended their influence across the southern borders of China from their colony of Annam (Vietnam), creating a French sphere of influence in China's southwestern province of Yunnan. In 1897, using the excuse of the murder of two missionaries, the Germans sent troops to China and acquired the port of Tianjing on the Shandong peninsula as the base for a German sphere of influence in north China. The Russians penetrated into Mongolia and Manchuria, where they built and controlled the rights to the Trans-Siberian railway, and secured Port Arthur on the Liaodong peninsula (1898).

Korea and the Sino-Japanese War

Korea had been heavily influenced early in its history by Chinese civilization and continued to exhibit many aspects of Chinese influence. China viewed Korea as one of its tributary states and part of a buffer zone of cultural influence and strategic interest. Even by the late nineteenth century, no European power saw Korea as sufficiently important to challenge China's influence there. However, as Japan became a formidable military and economic power in the region, the Japanese threatened China's historic domination of Korea, beginning in the 1870s with the Treaty of Kanghwa (1876), which on the surface guaranteed Korea's independent status but actually prevented Chinese interference with Japanese interests in Korea.

The Tonghak Rebellion

The Tonghak (Eastern Learning) Rebellion (1893–1894) provided a pretext for Japanese intervention in Korea. Like the leader of the Taiping Rebellion in China, Ch'oe Che'u (1824–1864), the Tonghak leader, was a disaffected scholar. Unlike the Taiping leader Hong Xiuquan, Ch'oe did not lead an armed rebellion, but he was still executed by the government. His successor roused Tonghak followers to open rebellion based on demands for political,

social, and economic reform, including punishment of corrupt officials and nobles, reforms in the examination system, and the right of young widows to remarry.

Japanese troops were sent to aid the Korean government in suppressing this rebellion, and China sent its own troops to balance those of Japan. The Sino-Japanese War of 1894–1895, resulting from conflicts over domination of political events on the Korean peninsula, ended in the crushing defeat of China by its cultural disciple and former tributary state, Japan. The Treaty of Shimonoseki (1895) ceded to Japan the island of Taiwan and recognized Japan's paramount interest in Korea.

Reform and Rebellion in china

The loss of the war sent a profound shock wave through the educated elite in China, particularly Chinese scholar-officials who recognized the failure of the piecemeal approach of self-strengthening and saw the need for more fundamental reform of the political and social order. Kang Youwei (1858–1927), an examination candidate at the capital in 1895, circulated a petition asking for the Manchu government to undertake reforms to respond to the crisis of the state symbolized in the defeat by Japan but dating from the beginnings of Western imperialism at the time of the first Opium War.

No lasting program of reform resulted from this request, but for a brief time during the summer of 1898, Kang led the 100 Days of Reform, during which the young Emperor Guangxu (r. 1875–1908) issued edicts calling for fundamental reforms in state, society, and the economy. The conservative empress dowager Cixi (1835–1908), Guangxu's aunt and the power behind the throne, canceled the reforms, placed the emperor under house arrest, and arrested the reformers, several of whom were summarily executed. Kang and others fled to Japan, ironically a haven for Chinese reformers and revolutionaries.

The Boxer Rebellion

The popular counterpart to the reform movement of 1898 was the Boxer Rebellion (1898–1900). Even though the immediate inspiration for the 1898 reform movement was the defeat of China by Japan, the larger implications of this defeat were related to China's failed efforts to respond to the threats and realities of Western imperialism. The Boxers reacted to the tangible presence of Western imperialism in the form of missionaries, traders, and diplomats by attacking missions, residences, and foreigners.

The Boxer movement was an outgrowth of secret society organization, a brotherhood based on popular religious beliefs and martial arts traditions known as the "Boxers United in Righteousness." They believed they could make themselves impervious to Western bullets by magic rituals and incantations. Inspired by antiforeign and anti-Christian sentiments, the

Boxers were active in the northeast, in the vicinity of the capital. Seeing the Boxers as a possible help in ridding China of foreign influence, the empress dowager aided them with imperial troops, which led to the Boxer siege of the Foreign Legation quarters in Beijing during the summer of 1900.

When an allied force of European, American, and Japanese troops finally reached Beijing, freed the hostages held in the Foreign Legation quarters, and thereby brought the Boxer Rebellion to an end, the Manchu government suffered yet another devastating blow to its authority. The Boxer Protocol, signed in 1901, called for China to pay compensation to the Western powers; but, in fact, many of these funds were used to pay for Chinese students sent to study abroad. Representatives of Western governments believed that Western education would help China to become a modern nation and reduce the likelihood of future conflicts with the West. In addition, the collapse of the Manchu government was not in the interests of Western nations, who restrained their demands in order to avoid the complete loss of power by the dynasty.

Reform and Revolution in China

During the first decade of the twentieth century, in the wake of the elite-led reform movement and the populist Boxer Rebellion, the Manchu government undertook substantial reforms, many of which ironically recalled the reform movement of 1898. The most important of these reforms was the abolition of the civil service examination system in 1905, which severed the bond between the scholar-official elite and the imperial government. Elite status was traditionally tied to passing the government-administered examinations, which determined eligibility for holding government office. When the examination system was abolished, the government's role in confirming elite status was undermined and people turned to other occupations besides government service—such as the military or commerce—as ways to achieve power, status, and wealth.

Other reforms were carried out in the economic and political arenas. A bureau of commerce was created to encourage and manage the commercial sector of the economy. But when steps were taken to establish a constitutional monarchy, including the election of provincial assemblies in 1908 (with an electorate limited by property ownership and education) and the convening of a national assembly in 1909, it was already too late for reform. The speed of historical events had overtaken the ability of the Manchu government to effect change and maintain control.

Resistance to the Manchus

In 1895 Sun Yat-sen (1866–1925), a Cantonese who studied in a missionary school in Hong Kong and was trained in medicine in Hawaii, organized the

Revive China Society to overthrow the Manchu monarchy and restore China to Chinese rule in a republican form of government. By 1905 Sun had formed a new organization, the Revolutionary Alliance, bringing disparate elements together into one group by emphasizing anti-Manchuism as the basis for common interests and action. This organization led an abortive uprising against the Manchus in Canton in the same year, and Sun barely escaped with his life.

Despite the efforts of the Manchu government to implement reforms, there was a steady weakening of its authority and a flow of power into the hands of the provincial elite, people who formed the electorate and the candidates for provincial assemblies and who before the abolition of the examination system would have been examination degree holders seeking office in the imperial government. By the first decade of the twentieth century, provincial elites had begun to see their interests as separable from those of the central government and to distinguish their provincial loyalties from service to the imperial government, which had been humiliated and weakened by Western powers beginning with the Opium Wars and reflected most vividly in the spheres of influence.

In 1910 members of the provincial elite in Sichuan organized a Railway Protection League in opposition to the Manchu government's proposed plan to accept foreign loans for the construction of a railway in Sichuan. Provincial leaders were opposed to this plan because the use of foreign loans was seen as yet another manifestation of foreign imperialism. This movement symbolized the new sense of independence and autonomy that had spread throughout the provinces. On October 10, 1911, a unit of the new army mutinied in the central Yangzi Valley city of Wuchang, and by December of that year sixteen of the eighteen provinces of China had declared their independence from the Manchu government. The Revolution of 1911 led to the founding of the Republic of China on January 1, 1912.

Sun Yat-sen and the Republic of China

Sun Yat-sen was declared the president of the republic, and he has often been credited for leading the Revolution of 1911. In fact, he was in Denver, Colorado, at the time of the Wuchang uprising, soliciting financial support from the area's Chinese residents, and returned to find that his dream had apparently been accomplished. However, the real forces that brought about the overthrow of the Manchu dynasty—regional militarization dating from the mid-nineteenth century and sociopolitical disintegration—had little to do with the revolutionary ideals espoused by Sun and his supporters.

Sun's political ideology, known as the "three principles of the people"—ethnic identity or nationalism, people's welfare or socialism, and people's rights or democracy—were adaptations of Western political concepts and had

no grounding in traditional thought. Sun himself was a product of Western influences in the treaty-port society of Canton, the British colony of Hong Kong, and Hawaii, where he was educated in Western medicine. Sun's fragile republicanism could not survive the brutal political, economic, and social conditions of early-twentieth-century China.

Only one month after taking office, Sun turned over the presidency to Yuan Shikai (1859–1916), the head of the elite Beiyang army, whose support had been crucial in forcing the abdication of the Manchus and in consolidating support behind the new government. Following Yuan's death, the tenuous unity of the republic collapsed and regional warlords controlled the country behind the facade of a central government in Beijing. The social and political dismemberment of China was complete, and further cultural disintegration would take place before the reconsolidation of China as a modern nation.

Japan and the West: The Meiji Restoration

Although Russian encroachments on Japan began as early as the seventeenth century and British ships entered Japanese waters in the early nineteenth century, it fell to Americans to "open" Japan. In 1853 Commodore Matthew C. Perry, bearing a letter containing a request to the ruler of Japan from the U.S. president for the opening of diplomatic and commercial relations, steamed into Uraga Bay near Edo, the capital of the Tokugawa shogunate. Perry left without a reply, promising to return the following year. The shogun, who was responsible for both national defense and foreign policy, consulted with the territorial rulers (*daimyo*) about how to respond to the American "request," which was backed up by the armed ships that brought it. The act of consulting with the *daimyo* irrevocably undermined the authority of the shogun to decide foreign policy and led to the unraveling of the threads that bound the *daimyo* to the shogunate.

When Perry returned in 1854, representatives of the shogun believed their only alternative was to sign the Treaty of Kanagawa, which provided for the opening of treaty ports and establishing diplomatic ties with the United States. A further treaty in 1858 set up the framework for commercial relations. In the early 1860s the presence of foreign residents in Japanese cities and foreign ships in Japanese harbors incited extremist attacks by young samurai who identified this presence with the weakness of the shogunate as well as with the aggressive intrusions of outsiders.

Among the various responses to the perceived foreign crisis that reverberated throughout the country were calls to "revere the emperor" and others to open the country to foreign influence. By 1866 two of the most powerful *daimyo* domains formed an alliance against the shogunate, and in 1868 with the coming of a new emperor to the throne, a coup led by these and two other domains overthrew the shogunate. The coup leaders declared the "Meiji

Restoration," the restoration of authority to the imperial line in the person of Emperor Meiji after more than 600 years of shogunal rule.

The cry of the Meiji Restoration was "enrich the nation, strengthen the army," and by 1873 a series of steps had been taken that fundamentally altered the social, political, and economic landscape of Japan. A new capital was declared at Edo, now known as Tokyo, and governors appointed by the Meiji leaders, who claimed to speak for the emperor, administered newly created prefectures (administrative districts) carved from former *daimyo* domains. The Meiji leaders adopted a national land tax base and organized a modern army. Westernization, guided by the Restoration leaders, in political and social institutions as well as in intellectual life became the hallmark of the Meiji era.

Less than a generation later, in 1894–1895 Japan proved the success of its endeavors by defeating China in war over domination of the Korean peninsula, and a bare decade later Japan defeated Russia in the Russo-Japanese War (1904–1905), a war generated by competing interests in Manchuria in northeastern China. In less than a half century, Japan had met the threat of Western imperialism with a revolutionary transformation into a modern nation state. Selective adoption of Western ideas, technology, and institutions, coupled with a strong national identity symbolized in the emperor, enabled Japan to weather the storms of Western imperialism and emerge unscathed.

Imperialism, Colonialism, and Nationalism in South Asia

Like other parts of the globe, India became a pawn of European politics and ultimately of the conflicting designs of imperialists. By the seventeenth century, the Mughal Empire, which once controlled large parts of India, had weakened so that it became easier for Europeans to make their presence felt. By this time the major European powers in India were France and Britain, and the French lost their position (excepting a few coastal trading stations) and influence to the British following defeat in the Seven Years' War at the Peace of Paris in 1763.

British Imperialism in India

From the outset the British did not govern India as conquered territory to be assimilated into their empire. An organization of traders, the British East India Company, chartered by Queen Elizabeth I in 1603, was responsible for British interests in India. That essentially private agency confirmed and expanded British control and exploitation of the subcontinent. The few settlers were mostly commercial and military agents. The European minority dominated the local population either directly, relying on their military and technological advantages after the decline of the Mughal empire, or indirectly through arrangements with Indian rulers.

After its victory over the French, the British government began to take steps to bring the activities of the East India Company more closely under its supervision, questioning the propriety of a commercial concern interfering in the affairs of a foreign land without supervision. Increasing government involvement formalized the process of creating a colony for the purpose of securing the state's commercial and strategic interests overseas. The India Act of 1784 set the standard for company rule up until 1858. It provided for a board of control that exercised considerable supervision over the company by sending directives straight to India and reviewing all the company's correspondence. The board appointed the governor general of the colony, though the company retained the right of nomination. This act considerably strengthened the British government's role in India and remained the operative mode of governing the colony until the mid-nineteenth century.

The Sepoy Mutiny

In 1857 the native troops of India (called *sepoy*) were ordered to bite off the tips of greased cartridges of their new Enfield rifles. Indian Hindu and Muslim soldiers, believing that the grease was made of forbidden animal fat, refused to obey the orders because it was sacrilegious to have contact with cows (in the case of the Hindus) or pigs (in the case of the Muslims). Those soldiers who disobeyed were stripped of their insignia and sent home by the British. Violence eventually erupted and was quickly extinguished by the British government. Historians have debated the events of the Sepoy Mutiny (or "Indian War") of 1857. Some have represented the rebellious refusal of native soldiers to obey orders as simply an army affair; others have characterized the incident as a full-scale revolt against British rule, a demand for political freedom; and still others have seen the event as an expression of religious grievance.

However interpreted, the events showed officials in India and in London that a change in the informal manner of governance was needed. The 1858 Government of India Act and subsequent laws made India, part of the British Empire. The East India Company disappeared from the scene, and the governor-general became a viceroy representing Queen Victoria, who was proclaimed empress of India in 1876 and to whose imperial crown was thus added the "jewel" of India. The viceroy governed India with an executive council; laws were made by a legislative council, consisting of the executive council and other appointed members. Though some of the larger Indian states had their own councils, ultimate authority rested with the viceroy who represented the British government. In London, a secretary of state for India, with a full ministerial department, replaced the board of control.

The Early Stages of Indian Nationalism

The agency of Indian nationalism was an organization called the Indian National Congress, which was formed in 1885. At first its demands were moderate, reformist rather than revolutionary, aiming to give Indians a voice in running their own country. Congress's practical suggestion for achieving this goal included reorganizing the Indian Civil Service to give Indians more opportunity to participate in the British-controlled government known as the "Raj."

The progress of the Indian nationalist movement was slow and fraught with regional and religious differences, of which the divisions between Hindu and Muslim were the most difficult. The leaders of the Indian National Congress also disagreed on how to bring an end to British rule. Congress became divided between extremists, the leader of whom was B. G. Tilak, and moderates, led by G. K. Gokhale. In 1905 Hindu-Muslim differences resulted in a separate Muslim League; in 1906, when Congress split between Tilak and Gokhale, the unity of the nationalist movement seemed ruined. Even so, antagonism toward the British was commonly shared, increased, and in time produced results.

Though the British were willing to take advantage of the division among nationalists in order to continue their rule, they also undertook several reforms, partly in the hope of defusing Indian nationalism. The India Councils Act of 1892 enlarged both the size and scope of the viceregal and provincial councils and allowed increased but nonofficial Indian membership. The new British order brought about by this act provided for an elected bicameral all-Indian parliament and for provincial legislative councils. Matters of local and lesser importance were entrusted to these bodies, but major decisions were still reserved for the British. The more radical Indian nationalists were already demanding independence, a demand that continued and was not appeased by further reform such as the Government of India Act of 1909. This act introduced indirect election and gave yet more Indian representation on councils, but it was still a far cry from even self-government, much less independence.

The United States and the Rise of the American Empire

Between the end of the Civil War (1865) and the beginning of World War I (1914), Thomas Jefferson's dream of an American republic of small, independent farmers became a distant memory. The Civil War had clarified the nature of the federal union by uniting the continent's diverse communities in basic agreement about their national identity. By the end of the nineteenth century, an economic destiny matched the political one. Rapidly evolving technology, expanding and more diverse populations, and increasing urbanization were forces transforming the United States into

what could be called a billion-dollar country, the most richly productive capitalist nation on earth.

Economic Expansion

The late-nineteenth-century boom was based on the exploitation of human and natural resources by ever-larger units of production and new technologies that resulted in efficient, rapid, and increased production. The emphasis was on quantity, often at the expense of quality, and reduced labor costs. The outcome was the creation of a consumer economy structured around production of consumer goods for the market. This kind of economy produced great wealth (not always equally distributed) and increased material comfort (for many).

The economic and social transformation of the United States in the post–Civil War decades was accompanied by a readjustment and reassessment of the American role and place in world affairs. The result was the creation of an American empire. Up to the Civil War, American attitudes and policies toward other countries were determined by the Monroe Doctrine (1823), the idea that the United States would keep out of European affairs, so long as Europeans kept out of the Western Hemisphere. The United States would keep its hands off Canada or Latin American countries except when Manifest Destiny (see Chapter 16) demanded otherwise, as in the Mexican War (1846–1848).

The "Assimilation" of Native Americans

The resolution of the Civil War may have formally ended slavery for African Americans, but it did not resolve the conflicts between Native Americans and European Americans represented by the federal government. The Cherokee removal of the 1830s (see Chapter 16) was the beginning, not the end, of federal military policy against Native Americans. By the 1860s and 1870s, the railroad and white hunters destroyed the bison herds that were sustenance to Great Plains peoples, and by the 1880s bison had nearly disappeared. Mining and farming likewise altered the familiar landscapes of Native American livelihood.

The Nez Perce

In 1877 the Nez Perce War broke out when, following a decade and a half of white settlers' encroachment, the federal government decided to take away Nez Perce ancestral lands in the northern Rocky Mountains. Like the Cherokees, the Nez Perce were defeated and deprived of their lands. When he surrendered, Nez Perce Chief Joseph reported: "Our chiefs are killed… The old men are all dead… It is cold and we have no blankets. The little children are freezing to death… I want to have time to look for my children and see how many of them I can find. Maybe I shall find them among the dead… I am tired; my heart is sick and sad."

The Sioux

In the mid-1870s the Sioux also struggled with the United States federal government and lost. Though the Sioux chief Crazy Horse and medicine man Sitting Bull confronted and slaughtered General George A. Custer and his men at the battle of the Little Big Horn in the Black Hills of South Dakota in 1876, the federal government ultimately defeated the Sioux and their allies, the Cheyenne, and they were confined to reservations. In the 1880s the United States government tried to assimilate the Sioux and other Indians to "Americanism," as defined by the outcome of the Civil War. The Indian Rights Association (IRA), founded in 1881, was the agency of this assimilation policy. Following his visit to the Great Sioux Reservation in 1881, William Welsh, the founder of the IRA, stated that the Indian had to be "taught to labor, to live in civilized ways, and to serve God." In order to embrace these values, they needed to unlearn communal values, give up their "pagan" beliefs, and become more individualistic. Assimilation meant that traditions and customs such as the shuffling and chanting of the Sun Dance, a cornerstone of Lakota belief, had to be given up. Secretary of the Interior Henry M. Teller ordered agents to suppress this custom in 1883.

Linking the private ownership of property to advanced civilization, the IRA also promoted the division of the Great Sioux Reserve, which ironically fit with the desire of land speculators and white settlers to acquire Sioux land. In the Sioux Act of 1889, Congress partitioned the Great Sioux Reservation, allotting 320 acres to each Sioux family head and opening about half the reserve for sale to whites. Though Sioux leaders were assured that acceptance of this land division would not result in a reduction in ration allotments (which they were due for having been displaced from their source of livelihood) from the federal government, Congress slashed appropriations for rations. By the end of 1889, the death rate at Pine Ridge in South Dakota was 45 people a month in a population of 5,550.

The Wounded Knee Massacre

The final tragedy took place at Wounded Knee Creek in South Dakota in 1890. Following the killing of Chief Sitting Bull for his resistance to federal attempts to force the Sioux onto reservations, federal troops, fearing an uprising, forced a group of 120 men and 230 Sioux women and children into a tent camp. When the soldiers sought to disarm the Indians, one warrior, apparently deaf, appeared to resist. The soldier opened fire with automatic rapid firing Gatling guns; 153 Indians lay dead, and dozens more crawled away to die in the bush. The genocide of the Native Americans which had begun in 1492 culminated at Wounded Knee nearly 400 years later.

The United States in World Affairs

Following the Civil War, the United States took a more forceful role in international affairs, a role compatible with and encouraging of economic growth. The United States, whose only tangible territorial connection with Africa was the state of Liberia (founded by American slaves), attended the Berlin Conference (1884–1885), which redrew the map of the continent for the benefit of Europeans. In 1905 President Theodore Roosevelt (in office 1901–1909) offered his good services to the Japanese and Russians to negotiate the Treaty of Portsmouth (New Hampshire) ending the Russo-Japanese War. In 1906 representatives of the United States attended a conference on African affairs, at Algeciras, Spain, when Morocco was handed over to the French.

Territorial Expansion

The abandonment of American isolation based on the Monroe Doctrine was indicated more forcefully by its territorial expansion. The territory north of the Rio Grande taken from Mexico in 1848 may be viewed as a (large) part of the realization of Manifest Destiny. The purchase of Alaska from Russia (1867), referred to at the time as "Seward's Folly" (after the secretary of state who arranged the purchase), was in fact a shrewd extension of American commercial interests in the Pacific.

The acquisition of Hawaii came next. In 1875 the United States established a protectorate over the islands, guaranteeing Hawaiian independence against any third party in return for trading privileges and the use of Pearl Harbor as a naval base. Americans quickly established huge, profitable sugar and pineapple industries in Hawaii, and by 1891, when Queen Liliuokalani came to the throne and endangered their interests by trying to check Americanization, they overthrew her and set up an independent republic that soon sought annexation to the United States. After some hesitation the Hawaiian republic was annexed in 1898.

Military Interventions

Americans also used force in the late nineteenth century in their quest for noncontiguous territory, most of which they acquired for economic reasons. The use of force rather than cash as a means of expansion is most clearly seen in interventions in the Caribbean and Latin America, where the United States steadily undertook to establish its hegemony. In 1895, invoking the Monroe Doctrine, President Grover Cleveland (in office 1885–1889; 1893–1897) intervened in a border dispute between British Guiana and Venezuela, forcing the British to accept American arbitration.

Roosevelt Corollary

In 1904, when Venezuela's default on a debt payment offered Europeans an opportunity to intervene there, President Theodore Roosevelt declared the American right to exercise "international police power" in the Western Hemisphere. The Roosevelt Corollary of the Monroe Doctrine summed up the direction of an aggressive imperialist policy, vigorously pursued on many fronts and in many ways.

The Spanish-American War

The Roosevelt Corollary was an effective means of furthering American economic and political interests. So was war, as the brief Spanish-American War (1898–1899) made clear. Revolutionary disturbances in Cuba and Puerto Rico, all that remained of the once vast Spanish-American empire, won support from Americans anxious to protect and extend their considerable investments on the two islands and disturbed by the forceful efforts of Spanish authorities to suppress the independence movements.

The unexplained sinking of the American battleship Maine in Havana harbor resulted in outright war between the United States and Spain. Spurred on by a mixture of humanitarianism, greed, and dreams of martial glory, the Spanish-American War (from which Theodore Roosevelt emerged as a hero) was a brief conflict easily won by the United States. Puerto Rico was annexed, and a veiled protectorate was established over Cuba by means of the Platt Amendment, which gave the United States broad rights of intervention in matters of "life, property, individual liberty" and "Cuban independence." In Asia, the Philippines and Guam became American protectorates as result of the Spanish-American War.

The Panama Canal

In 1903, when Colombia faced a revolution in its isthmus of Panama, Roosevelt intervened. Supporting the revolutionaries, he immediately recognized Panama as an independent republic and thus created an ally sympathetic to an American desire to build a canal across the isthmus. The idea of such a canal came from Ferdinand de Lesseps, who had built the Suez Canal, but whose French Panama Canal company went bankrupt in 1880. The United States bought French rights and assets associated with the canal project in 1887, and in 1904 the United States leased the canal zone, subsequently fortified, which bifurcated its client state in Panama. American capital financed the construction of the Panama Canal, which relied on labor from the Caribbean region. Ten years after work resumed, the canal was completed (1914), and the strategically valuable connection between the Atlantic and Pacific oceans was under the control of the United States.

The Expansion of American Influence

The rapid spread of American influence and empire into the Caribbean and Latin America, across the Pacific, and into the diplomatic councils of Europe was also symbolized by President Theodore Roosevelt's advocacy of a large American navy, one appropriate to the position of the United States in the world. The American president, like his British and German contemporaries, was not unaware of the highly regarded and influential Influence of Seapower upon History by the American admiral Alfred Thayer Mahan (1840–1914). Roosevelt's entry into the naval race that was gripping Europe was to dispatch his "great white fleet," a flotilla of American naval vessels, on a world tour, a powerful—and no less powerful by being symbolic—indication of the position the United States would assume in world affairs in the twentieth century.

Latin America and the Caribbean

In Central America, in addition to the protectorate established in Panama, the United States naval intervention in Nicaragua (1909) (associated with internal political changes) was followed by an extended occupation by Marines (1912–1925), during which the Americans secured rights to build a canal across Nicaragua (1916). Imperialism in Central America was very closely connected to the exploitation of that area by such American enterprises as United Fruit Company. The interlocking nature of commercial and political ties made it difficult to distinguish between "dollar" (guided by economic interests) and "gunboat" (determined by military force or threat of force) diplomacy. American military action south of the border also included forays to Mexico, where political instability resulting from the Mexican Revolution (1911–1913) provided opportunities for intervention in 1914 and again in 1916–1917. In the Caribbean, the United States occupied the Dominican Republic from 1916 to 1934, and direct rule was added to the United States control of customs receipts in Haiti from 1915 to 1934.

North America

The establishment of dominance in the Caribbean and Latin America is not the only example of American expansionism. Normally peaceful relations with Canada were aggravated by a boundary dispute between British Columbia and Alaska that was brought to a crisis by the gold rushes in that area. This dispute, settled in 1903 in favor of the United States when the British member of the arbitration commission voted with the American, confirmed the Alaska panhandle as American territory, revived suspicions of American expansionism in Canada, and further disillusioned Canadians with Great Britain, fueling their own break with imperialism.