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Few Europeans had traveled to south Africa by the mid-nineteenth century, but the discovery of diamonds and rich gold deposits brought both European settlers and dramatic change to the region. European prospectors flocked to south Africa to seek their fortune.

Among the arrivals was Cecil John Rhodes, an eighteen-year-old student at Oxford University, who in 1871 went to south Africa in search of a climate that would relieve his tuberculosis. Rhodes was persistent, systematic, and ambitious. He carefully supervised African laborers who worked his claims in the diamond fields, and he bought the rights to others' claims when they looked promising. By 1889, at age thirty-five, he had almost completely monopolized diamond mining in south Africa, and he controlled 90 percent of the world's diamond production. With ample financial backing, Rhodes built up a healthy stake in the gold-mining business, although he did not seek to monopolize gold the way he did diamonds. He also entered politics, serving as prime minister (1890–1896) of the British Cape Colony.

Yet Rhodes's ambitions went far beyond business and local politics. In his vision the Cape Colony would serve as a base of operations for the extension of British control to all of Africa, from Cape to Cairo. Rhodes led the movement to enlarge the colony by absorbing territories to the north settled by Dutch farmers. Under Rhodes's guidance, the colony annexed Bechuanaland (modern Botswana) in 1885, and in 1895 it added Rhodesia (modern Zambia and Zimbabwe) to its holdings. But Rhodes's plan did not stop with Africa: he urged the expansion of the British empire until it embraced all the world, and he even hoped to bring the United States of America back into the British fold. Rhodes considered British society the most noble, moral, and honorable in the world, and he regarded imperial expansion as a duty to humankind: "We are the finest race in the world," he said in 1877, "and the more of the world we inhabit, the better it is for the human race." In his sense of superiority to other peoples as well as his restless energy, his compulsion to expand, and his craving to extract mineral wealth from distant parts of the world, Rhodes represented well the views of European imperialists who carved the world into colonies during the nineteenth century.

Throughout history strong societies have often sought to dominate their weaker neighbors by subjecting them to imperial rule. They have built empires for various reasons: to gain control over natural resources, to subdue potential enemies, to seize wealth, to acquire territory for expansion, and to win glory. From the days of ancient Mesopotamia and Egypt to the present, imperialism has been a prominent theme of world history.

During the second half of the nineteenth century, as the Ottoman and Qing empires weakened, a handful of western European states wrote a new chapter in the history of imperialism.

OPPOSITE: The battle of Omdurman on the Nile River, 2 September 1898.

Strong nationalist sentiments enabled them to mobilize their populations for purposes of overseas expansion. Industrialization equipped them with the most effective tools and the most lethal weapons available anywhere in the world. Three centuries of experience with maritime trade in Asia, Africa, the Americas, and Oceania provided them with unparalleled knowledge of the world and its peoples. With those advantages, western European peoples conquered foreign armies, overpowered local rulers, and imposed their hegemony throughout the world. Toward the end of the century, the United States and Japan joined European states as new imperial powers.

The establishment of global empires had far-reaching effects. In many ways, imperialism tightened links between the world's societies. Imperial powers encouraged trade between dominant states and their overseas colonies, for example, and they organized mass migrations of laborers to work in agricultural and industrial ventures. Yet imperialism also fostered divisions between the world's peoples. Powerful tools, deadly weapons, and global hegemony tempted European peoples to consider themselves superior to their subjects throughout the world: modern racism is one of the legacies of imperialism. Another effect of imperialism was the development of nationalism in subject lands. Just as the incursion of Napoleonic armies stimulated the development of nationalism in Europe, so the imposition of foreign rule provoked nationalist responses in colonized lands. Although formal empires almost entirely dissolved in the twentieth century, the influence of global imperialism continues to shape the contemporary world.

Foundations of Empire

Even under the best of circumstances, campaigns to conquer foreign lands have always been dangerous and expensive ventures. They have arisen from a sense that foreign conquest is essential, and they have entailed the mobilization of political, military, and economic resources. In nineteenth-century Europe, proponents of empire advanced a variety of political, economic, and cultural arguments to justify the conquest and control of foreign lands. The imperialist ventures that they promoted enjoyed dramatic success partly because of the increasingly sophisticated technologies developed by European industry.

Motives of Imperialism

Modern Imperialism

The building of empires is an old story in world history. By the nineteenth century, however, European observers recognized that empires of their day were different from those of earlier times. Accordingly, about midcentury they began to speak of *imperialism*, and by the 1880s the recently coined term had made its way into popular speech and writing throughout western Europe. In contemporary usage, imperialism refers to the domination of European powers—and later the United States and Japan as well—over subject lands in the larger world. Sometimes that domination came in the old-fashioned way, by force of arms, but often it arose from trade, investment, and business activities that enabled imperial powers to profit from subject societies and influence their affairs without going to the trouble of exercising direct political control.

Modern Colonialism

Like the building of empires, the establishment of colonies in foreign lands is a practice dating from ancient times. In modern parlance, however, colonialism refers not just to the sending of colonists to settle new lands but also to the political, social, economic, and cultural structures that enabled imperial powers to dominate subject lands. In some lands, such as North America, Chile, Argentina, Australia, New Zealand,

and south Africa, European powers established settler colonies populated largely by migrants from the home societies. Yet contemporary scholars also speak of European colonies in India, southeast Asia, and sub-Saharan Africa, even though European migrants did not settle there in large numbers. European agents, officials, and businesspeople effectively turned those lands into colonies and profoundly influenced their historical development by controlling their domestic and foreign policies, integrating local economies into the network of global capitalism, introducing European business techniques, transforming educational systems according to European standards, and promoting European cultural preferences.

During the second half of the nineteenth century, many Europeans came to believe that imperial expansion and colonial domination were crucial for the survival of their states and societies—and sometimes for the health of their personal fortunes as well. European merchants and entrepreneurs sometimes became fabulously wealthy from business ventures in Asia or Africa, and they argued for their home states to pursue imperialist policies partly to secure and enhance their own enterprises. After making his fortune mining diamonds and gold, for example, Cecil Rhodes (1853–1902) worked tirelessly on behalf of British imperial expansion.

It is not difficult to understand why entrepreneurs such as Rhodes would promote overseas expansion, but their interests alone could not have driven the vast imperialist ventures of the late nineteenth century. In fact, a wide range of motives encouraged European peoples to launch campaigns of conquest and control. Some advocates argued that imperialism was in the economic interests of European societies as well as individuals. They pointed out that overseas colonies could serve as reliable sources of raw materials not available in Europe that came into demand because of industrialization: rubber, tin, and copper were vital products, for example, and by the late nineteenth century petroleum had also become a crucial resource for industrialized lands. Rubber trees were indigenous to the Amazon River basin, but imperialists established colonial rubber plantations in the Congo River basin and Malaya. Abundant supplies of tin were available from colonies in southeast Asia and copper in central Africa. The United States and Russia supplied most of the world's petroleum in the nineteenth century, but the oil fields of southwest Asia attracted the attention of European industrialists and imperialists alike.

Proponents of imperialism also held that colonies would consume manufactured products and provide a haven for migrants in an age of rapidly increasing European population. In fact, manufactured goods did not flow to most colonies in large quantities, and European migrants went overwhelmingly to independent states in the Americas rather than to overseas colonies. Nevertheless, arguments arising from national economic interest generated considerable support for imperialism.

As European states extended their influence overseas, a geopolitical argument for imperialism gained prominence. Even if colonies were not economically beneficial, imperialists held, it was crucial for political and military reasons to maintain them. Some overseas colonies occupied strategic sites on the world's sea-lanes, and others offered harbors or supply stations for commercial and naval ships. Advocates of imperialism sought to gain those advantages for their own states and—equally important—to deny them to rivals.

Imperialism had its uses also for domestic politics. In an age when socialists and communists directly confronted industrialists, European politicians and national leaders sought to defuse social tension and inspire patriotism by focusing public attention on foreign imperialist ventures. Cecil Rhodes himself once observed that imperialism was an attractive alternative to civil war, and the German chancellor Otto von Bismarck worked to persuade both industrialists and workers that overseas expansion

Economic Motives of Imperialism

Political Motives of Imperialism



■ Cecil Rhodes resting in the goldfields of south Africa, about 1897.

Cultural Justifications of Imperialism

would benefit them all. By the end of the nineteenth century, European leaders frequently organized colonial exhibitions where subject peoples displayed their dress, music, and customs for tourists and the general public in imperial lands, all in an effort to win popular support for imperialist policies.

Even spiritual motives fostered imperialism. Like the Jesuits in the early modern era, missionaries flocked to African and Asian lands in search of converts to Christianity. Missionaries often opposed imperialist ventures and defended the interests of their converts against European entrepreneurs and colonial officials. Nevertheless, their spiritual campaigns provided a powerful religious justification for imperialism. Furthermore, missionaries often facilitated communications between imperialists and subject peoples, and they sometimes provided European officials with information they needed to maintain control of overseas colonies. Missionary settlements also served as convenient meeting places for Europeans overseas and as distribution centers for European manufactured goods.

While missionaries sought to introduce Christianity to subject peoples, other Europeans worked to bring them “civilization” in the form of political order and social stability. French imperialists routinely invoked the *mission civilisatrice* (“civilizing mission”) as justification for their expansion into Africa and Asia, and the English writer and poet Rudyard Kipling (1864–1936) defined the “white man’s burden” as the duty of European and Euro-American peoples to bring order and enlightenment to distant lands.

Tools of Empire

Even the strongest motives would not have enabled imperialists to impose their rule throughout the world without the powerful technological advantages that industrialization conferred on them. Ever since the introduction of gunpowder in the thirteenth century, European states had competed vigorously to develop increasingly powerful military technologies. Industrialization enhanced those efforts by making it possible to produce huge quantities of advanced weapons and tools. During the nineteenth century,

Sources from the Past

Rudyard Kipling on the White Man's Burden

Rudyard Kipling lived in northern India for the first six years of his life. He grew up speaking Hindi, and he mixed easily with Indian subjects of the British empire. After attending a boarding school in England, he returned to India in 1882 and became a journalist and writer. Many of his works express his deep enchantment with India, but he also believed strongly in imperial rule. Indeed, he wrote his famous poem titled "The White Man's Burden" to encourage the United States to impose colonial rule in the Philippines. While recognizing the unpopularity of foreign rule, Kipling considered it a duty to bring order to colonial lands and to serve subject peoples.

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

Take up the White Man's burden—
 In patience to abide,
 To veil the threat of terror
 And check the show of pride;
 By open speech and simple,
 An hundred times made plain,
 To seek another's profit,
 And work for another's gain.

Take up the White Man's burden—
 The savage wars of peace—
 Fill full the mouth of Famine
 And bid the sickness cease;
 And when your goal is nearest
 The end for others sought,
 Watch Sloth and heathen Folly
 Bring all your hope to nought.

Take up the White Man's burden—
 No tawdry rule of kings,
 But toil of serf and sweeper—
 The tale of common things.
 The ports ye shall not enter,
 The roads ye shall not tread,
 Go make them with your living,
 And mark them with your dead.

Take up the White Man's burden—
 And reap his old reward:
 The blame of those ye better,
 The hate of those ye guard—
 The cry of hosts ye humor
 (Ah, slowly!) toward the light;—
 "Why brought ye us from bondage,
 "Our loved Egyptian night?"

Take up the White Man's burden—
 Ye dare not stoop to less—
 Nor call too loud on Freedom
 To cloak your weariness;
 By all ye cry or whisper,
 By all ye leave or do,
 The silent, sullen peoples
 Shall weigh your Gods and you.

Take up the White Man's burden—
 Have done with childish days—
 The lightly proffered laurel,
 The easy, ungrudged praise.
 Comes now, to search your manhood
 Through all the thankless years,
 Cold, edged with dear-bought wisdom,
 The judgment of your peers!

FOR FURTHER REFLECTION

Compare and contrast the sorts of adjectives Kipling uses to describe native peoples as opposed to Europeans; how does his very language usage convey his sense of white superiority?

SOURCE: Rudyard Kipling. "The White Man's Burden." *McClure's Magazine* 12, no. 4 (1899): 290–91.

Transportation Technologies

industrialists devised effective technologies of transportation, communication, and war that enabled European imperialists to have their way in the larger world.

The most important innovations in transportation involved steamships and railroads. Small steamboats plied the waters of the United States and western Europe from the early nineteenth century. During the 1830s British naval engineers adapted steam power to military uses and built large, ironclad ships equipped with powerful guns. These steamships traveled much faster than any sailing vessel, and as an additional advantage they could ignore the winds and travel in any direction. Because they could travel much farther upriver than sailboats, which depended on convenient winds, steamships enabled imperialists to project power deep into the interior regions of foreign lands. Thus in 1842 the British gunboat *Nemesis* led an expedition up the Yangzi River that brought the Opium War to a conclusion. Steam-powered gunboats later introduced European power to inland sites throughout Africa and Asia.

The construction of new canals enhanced the effectiveness of steamships. Both the Suez Canal (constructed 1859–1869) and the Panama Canal (constructed 1904–1914) facilitated the building and maintenance of empires by enabling naval vessels to travel rapidly between the world's seas and oceans. They also lowered the costs of trade between imperial powers and subject lands.

Once imperialists had gained control of overseas lands, railroads helped them to maintain their hegemony and organize local economies to their own advantage. Rail transportation enabled colonial officials and armies to travel quickly through the colonies. It also facilitated trade in raw materials and the distribution of European manufactured goods in the colonies.

Military Technologies

European industrialists also churned out enormous quantities of increasingly powerful weapons. The most advanced firearms of the early nineteenth century were smoothbore, muzzle-loading muskets. When large numbers of infantry fired their muskets at once, the resulting volley could cause havoc among opponents. Yet it took a skilled musketeer about one minute to reload a weapon, and because of its smoothbore, the musket was not a very accurate firearm. By midcentury European armies were using breech-loading firearms with rifled bores that were far more accurate and reliable than muskets. By the 1870s Europeans were experimenting with rifled machine guns, and in the 1880s they adopted the Maxim gun, a light and powerful weapon that fired eleven bullets per second.

Those firearms provided European armies with an arsenal vastly stronger than any other in the world. Accurate rifles and machine guns devastated opposing overseas forces, enabling European armies to impose colonial rule almost at will. In 1898, for example, a British army with twenty machine guns and six gunboats encountered a Sudanese force at Omdurman, near Khartoum on the Nile River. During five hours of fighting, the British force lost a few hundred men while machine guns and explosive charges fired from gunboats killed thousands of Sudanese. The battle of Omdurman opened the door for British colonial rule in Sudan.

Communications Technologies

Communications also benefited from industrialization. Oceangoing steamships reduced the time required to deliver messages from imperial capitals to colonial lands. In the 1830s it took as long as two years for a British correspondent to receive a reply to a letter sent to India by sailing ship. By the 1850s, however, after the introduction of steamships, correspondence could make the round-trip between London and Bombay in four months. After the opening of the Suez Canal in 1869, steamships traveled from Britain to India in less than two weeks.

The invention of the telegraph made it possible to exchange messages even faster. Telegraph wires carried communications over land from the 1830s, but only in the 1850s did engineers devise reliable submarine cables for the transmission of messages



Thousands of spectators gathered on the banks of the Suez Canal in 1869 to watch a parade of ships that opened the canal by proceeding from the Mediterranean to the Red Sea.

through the oceans. By 1870 submarine cables carried messages between Britain and India in about five hours. By 1902 cables linked all parts of the British empire throughout the world, and other European states maintained cables to support communications with their own colonies. Their monopoly on telegraphic communications provided imperial powers with distinct advantages over their subject lands. Imperial officials could rapidly mobilize forces to deal with troubles, and merchants could respond quickly to developments of economic and commercial significance. Rapid communication was an integral structural element of empire.

European Imperialism

Aided by powerful technologies, European states launched an unprecedented round of empire building in the second half of the nineteenth century. Imperial expansion began with the British conquest of India. Competition between imperial powers led to European intrusion into central Asia and the establishment of colonies in southeast Asia. Fearful that rivals might gain control over some region that remained free of imperial control, European states embarked on a campaign of frenzied expansion in the 1880s that brought almost all of Africa and Pacific Ocean territories into their empires.

The British Empire in India

The British empire in south Asia and southeast Asia grew out of the mercantile activities of the English East India Company, which enjoyed a monopoly on English trade with India. The East India Company obtained permission from the Mughal emperors of India to build fortified posts on the coastlines. There company agents traded for goods and stored commodities in warehouses until company ships arrived to transport them to Europe. In the seventeenth century, company merchants traded mostly for Indian pepper and cotton, Chinese silk and porcelain, and fine spices from southeast Asia. During the eighteenth century, tea and coffee became the most prominent trade items, and European consumers acquired a taste for both beverages that they have never lost.

Company Rule

After the death of the emperor Aurangzeb in 1707, the Mughal state entered a period of decline, and many local authorities asserted their independence of Mughal rule. The East India Company took advantage of Mughal weakness to strengthen and expand its trading posts. In the 1750s company merchants began campaigns of outright conquest in India, largely to protect their commercial interests from increasing disorder in the subcontinent. From their forts at Calcutta, Madras, and Bombay, the merchants extended their authority inland and won official rights to rule from the Mughal emperors and local authorities. They enforced their rule with a small British army and a large number of Indian troops known as sepoy.

A revolt by the sepoy led to the establishment of direct British imperial rule in India. In 1857 sepoy regiments received new Enfield rifles that fired bullets from cartridges. To protect them from moisture, the cartridges came in paper waxed with animal fat, and British officers instructed the sepoy to tear the paper off with their teeth. Hindu sepoy refused to comply out of concern that the protective fat came from cows, which they held sacred, and their Muslim counterparts refused on grounds that the fat might have come from pigs, which they considered foul. Even though British officials soon changed the procedures for packing and opening cartridges, in May 1857 Hindu sepoy staged a mutiny, killed their British officers, and proclaimed restoration of Mughal authority. Peasants and disgruntled elites joined the fray and transformed a minor mutiny into a large-scale rebellion that seriously threatened British rule in India. But the rebels had different interests and could not agree on a common program; in contrast, British forces benefited from powerful weapons and telegraphic communications, which enabled them to rush troops to trouble spots. The conflict produced some horrifying episodes of violence. At Cawnpore, near Lucknow, sepoy quickly overcame the British garrison and its population of 60 soldiers, 180 civilian men, and some 375 women and children. The rebels killed all the men—many of them as they surrendered—and two weeks later massacred the women and children. When a fresh British force arrived, it exacted revenge by subjecting rebels and suspects to summary execution by hanging. Elsewhere British forces punished mutineers by blowing them to bits with a cannon. By May 1858 the British had crushed the rebellion and restored their authority in India.

British Imperial Rule

To stabilize affairs and forestall future problems, the British government preempted the East India Company and imposed direct imperial rule in India. In 1858 Queen Victoria (reigned 1837–1901) assigned responsibility for Indian policy to the newly established office of secretary of state for India. A viceroy represented British royal authority in India and administered the colony through an elite Indian civil service staffed almost exclusively by the English. Indians served in low-level bureaucratic positions, but British officials formulated all domestic and foreign policy in India.

Under both the East India Company and direct colonial administration, British rule transformed India. As they extended their authority to all parts of India and Ceylon (modern Sri Lanka), British officials cleared forests, restructured landholdings, and encouraged the cultivation of crops, such as tea, coffee, and opium, that were especially valuable trade items. They built extensive railroad and telegraph networks that tightened links between India and the larger global economy. They also constructed new canals, harbors, and irrigation systems to support commerce and agriculture.

British colonial authorities made little effort to promote Christianity, but they established English-style schools for the children of Indian elites, whom they sought as supporters of their rule. They also suppressed Indian customs that conflicted with European law or values. Most prominent of those customs was sati, the practice of widows burning themselves on their husbands' funeral pyres. Although not universally observed, sati was not an uncommon practice among upper-class Hindus, who believed that women should serve their husbands loyally and follow them even in death. Under pressure from



A contemporary British print depicts the atrocities at Cawnpore. At left, sepoys kill British troops and men from the garrison, while women and children fall in the foreground. At the right, rebels stuff their victims' corpses in a well.

the East India Company, Indian law banned sati as early as 1829, but effective suppression of the practice came only after a long campaign by colonial authorities.

Imperialism in Central Asia and Southeast Asia

As the East India Company and British colonial agents tightened their grip on India, competition among European states kindled further empire-building efforts. Beginning in the early nineteenth century, French and Russian strategists sought ways to break British power and establish their own colonial presence in India. The French bid stalled after the fall of Napoleon, but Russian interest in India fueled a prolonged contest for power in central Asia.

Russian forces had probed central Asia as early as the sixteenth century, but only in the nineteenth century did they undertake a systematic effort to extend Russian authority south of the Caucasus. The weakening of the Ottoman and Qing empires turned central Asia into a political vacuum and invited Russian expansion into the region. By the 1860s cossacks had overcome Tashkent, Bokhara, and Samarkand, the great caravan cities of the silk roads, and approached the ill-defined northern frontier of British India. For the next half century, military officers and imperialist adventurers engaged in a risky pursuit of influence and intelligence that British agents referred to as the “Great Game.”

Russian and British explorers ventured into parts of central Asia never before visited by Europeans. They mapped terrain, scouted mountain passes, and sought alliances

The Great Game



Map 33.1 Imperialism in Asia, ca. 1914. Date is year of conquest. Note the claims made by various industrial powers.

Which territories remained unclaimed, and why? Which power claimed the most imperial territory in Asia?

with local rulers from Afghanistan to the Aral Sea—all in an effort to prepare for the anticipated war for India. In fact, the outbreak of global war in 1914 and the collapse of the tsarist state in 1917 ensured that the contest for India never took place. Nevertheless, imperial expansion brought much of central Asia into the Russian empire and subjected the region to a Russian hegemony that persisted until the disintegration of the Soviet Union in 1991.

Competition among European powers led also to further imperialism in southeast Asia. The Philippines had come under Spanish colonial rule in the sixteenth century, and many southeast Asian islands fell under Dutch rule in the seventeenth century. As imperial rivalries escalated in the nineteenth century, Dutch officials tightened their control and extended their authority throughout the Dutch East Indies, the archipelago that makes up the modern state of Indonesia. Along with cash crops of sugar, tea, coffee, and tobacco, exports of rubber and tin made the Dutch East Indies a valuable and productive colony.

In the interests of increasing trade between India, southeast Asia, and China, British imperialists moved in the nineteenth century to establish a presence in southeast Asia. As early as the 1820s, colonial officials in India came into conflict with the kings of Burma (modern Myanmar) while seeking to extend their influence to the Irrawaddy River delta. By the 1880s they had established colonial authority in Burma, which became a source of teak, ivory, rubies, and jade. In 1824 Thomas Stamford Raffles founded the port of Singapore, which soon became the busiest center of trade in the Strait of Melaka. Administered by the colonial regime in India, Singapore served as the base for the British conquest of Malaya (modern Malaysia) in the 1870s

British Colonies in Southeast Asia



Warships provide covering fire as British troops prepare to storm the Burmese port of Rangoon in 1824.

and 1880s. Besides offering outstanding ports that enabled the British navy to control sea-lanes linking the Indian Ocean with the South China Sea, Malaya provided abundant supplies of tin and rubber.

Although foiled in their efforts to establish themselves in India, French imperialists built the large southeast Asian colony of French Indochina, consisting of the modern states of Vietnam, Cambodia, and Laos, between 1859 and 1893. Like their British counterparts in India, French colonial officials introduced European-style schools and sought to establish close connections with native elites. Unlike their rivals, French officials also encouraged conversion to Christianity, and as a result the Roman Catholic church became prominent throughout French Indochina, especially in Vietnam. By century's end, all of southeast Asia had come under European imperial rule except for the kingdom of Siam (modern Thailand), which preserved its independence largely because colonial officials regarded it as a convenient buffer state between British-dominated Burma and French Indochina.

French Indochina

The Scramble for Africa

The most striking outburst of imperialism took place in Africa. As late as 1875 European peoples maintained a limited presence in Africa. They held several small coastal colonies and fortified trading posts, but their only sizable possessions were the Portuguese colonies of Angola and Mozambique, the French settler colony in northern Algeria, and a cluster of settler colonies populated by British and Dutch migrants in south Africa. After the end of the slave trade, a lively commerce developed around the exchange of African gold, ivory, and palm oil for European textiles, guns, and manufactured goods. This trade brought considerable prosperity and economic opportunity, especially to west African lands.

Between 1875 and 1900, however, the relationship between Africa and Europe dramatically changed. Within a quarter century European imperial powers partitioned and colonized almost the entire African continent. Prospects of exploiting African resources and nationalist rivalries between European powers help to explain this frenzied quest for empire, often referred to as the “scramble for Africa.”

*European Explorers
in Africa*

Henry Morton Stanley spent a great deal of time in the field, but here he appears, along with his gun bearer Kalulu, in front of a painted backdrop in a photographer's studio.

European imperialists built on the information compiled by a series of adventurers and explorers who charted interior regions of Africa that Europeans had never before visited. Some went to Africa as missionaries. Best known of them was Dr. David Livingstone, a Scottish minister, who traveled through much of central and southern Africa in the mid-nineteenth century in search of suitable locations for mission posts. Other travelers were adventurers such as the American journalist Henry Morton Stanley, who undertook a well-publicized expedition to find Livingstone and report on his activities. Meanwhile, two English explorers, Richard Burton and John Speke, ventured into east Africa seeking the source of the

Nile River. The geographic information compiled by these travelers held great interest for merchants eager to exploit business opportunities in Africa.

Especially exciting was reliable information about the great African rivers—the Nile, Niger, Congo, and Zambesi—and the access they provided to inland regions. In the 1870s King Leopold II of Belgium (reigned 1865–1909) employed Henry Morton Stanley to help develop commercial ventures and establish a colony called the Congo Free State (modern-day Democratic Republic of the Congo) in the basin of the Congo River. To forestall competition from Belgium's much larger and more powerful European neighbors, Leopold announced that the Congo region would be a free-trade zone accessible to merchants and businesspeople from all European lands. In fact, however, he carved out a personal colony and filled it with lucrative rubber plantations run by forced labor. Working conditions in the Congo Free State were so brutal, taxes so high, and abuses so many that humanitarians protested Leopold's colonial regime. Predatory rule had culminated in the death of four to eight million Africans. In 1908 the Belgian government took control of the colony, known thereafter as Belgian Congo.

As Leopold colonized central Africa, Britain established an imperial presence in Egypt. As Muhammad Ali and other Egyptian rulers sought to build up their army, strengthen the economy, and distance themselves from Ottoman authority, they borrowed heavily from European lenders. In the 1870s crushing debt forced Egyptian officials to impose high taxes, which provoked popular unrest and a military rebellion. In 1882 a British army occupied Egypt to protect British financial interests and ensure the safety of the Suez Canal, which was crucial to British communications with India.

South Africa

Long before the nineteenth-century scramble, a European presence had grown at the southern tip of the African continent, where the Dutch East India Company had

established Cape Town (1652) as a supply station for ships en route to Asia. Soon after, former company employees plus newly arrived settlers from Europe moved into lands beyond company control to take up farming and ranching. Many of these settlers, known first as Boers (the Dutch word for “farmer”) and then as Afrikaners (the Dutch word for “African”), believed that God had predestined them to claim the people and resources of the Cape. The area under white settler control expanded during the eighteenth century as a steady stream of European migrants—chiefly Dutch, Germans, and French Huguenots fleeing religious persecution—continued to swell the colony’s population. As European settlers spread beyond the reaches of the original colony, they began encroaching on lands occupied by Khoikhoi and Xhosa peoples. Competition for land soon led to hostility, and by the early eighteenth century, warfare, enslavement, and smallpox epidemics had led to the virtual extinction of the Khoikhoi. After a century of intermittent warfare, the Xhosa too had been decimated, losing lives, land, and resources to European settlers.

The British takeover of the Cape during the Napoleonic Wars (1799–1815) encouraged further Afrikaner expansion into the interior of south Africa. The establishment of British rule in 1806 deeply disrupted Afrikaner society, for in its wake came the imposition of English law and language. The institution of slavery—a key defining feature of rural Afrikaner society—developed into the most contentious issue between British administrators and Afrikaner settlers. When the British abolished slavery in 1833, they not only eliminated the primary source of labor for white farmers but also dealt a crippling blow to Afrikaner financial viability and lifestyles. Chafing under British rule, Afrikaners started to leave their farms in Cape Colony and gradually migrated east in what they called the Great Trek. That colonial expansion sometimes led to violent conflict with indigenous peoples, but the superior firepower of Afrikaner *voortrekkers* (Afrikaans for “pioneers”) overcame first Ndebele and then Zulu resistance. The colonizers interpreted their successful expansion as evidence that God approved of their dominance in south Africa. By the mid-nineteenth century, *voortrekkers* had created several independent republics: the Republic of Natal, annexed by the British in 1843; the Orange Free State in 1854; and the South African Republic (Transvaal territories) in 1860.

Britain’s lenient attitude toward Afrikaner statehood took a drastic turn with the discovery of large mineral deposits in Afrikaner-populated territories—diamonds in 1867 and gold in 1886. The influx of thousands of British miners and prospectors led to tensions between British authorities and Afrikaners, culminating in the South African War (1899–1902; sometimes called the Boer War). Although the brutal conflict pitted whites against whites, it also took a large toll on black Africans, who served both sides as soldiers and laborers. The internment of 100,000 black Africans in British concentration camps, for example, left more than 10,000 dead. The Afrikaners conceded defeat in 1902, and by 1910 the British government had reconstituted the four former colonies as provinces in the Union of South Africa, a largely autonomous British dominion. British attempts at improving relations between English speakers



This 1912 photograph shows a stark portrait of the Belgian king’s inhumane treatment of Africans in the Congo.

and Afrikaners centered on shoring up the privileges of white colonial society and the domination of black Africans.

The Berlin Conference

Tensions between those European powers who were seeking African colonies led to the Berlin West Africa Conference (1884–1885), during which the delegates of twelve European states as well as the United States and the Ottoman empire—not a single African was present—devised the ground rules for the colonization of Africa. Half the nations represented, including the United States, had no colonial ambitions on the continent, but they had been invited to give the proceedings a veneer of unbiased international approval. The Berlin Conference produced agreement for future claims on African lands: each colonial power had to notify the others of its claims, and each claim had to be followed up by “effective occupation” of the claimed territory. Occupation was commonly accomplished either by getting a signed agreement from a local African ruler or by military conquest. Conference participants also spelled out noble-minded objectives for colonized lands: an end to the slave trade, the extension of civilization and Christianity, and commerce and trade. Although the conference did not parcel out African lands among the participant nations, it nevertheless served public notice that European powers were poised to carve the continent into colonies.

During the next twenty-five years, European imperialists sent armies to consolidate their claims and impose colonial rule. Armed with the latest weapons technology, including the newly developed machine gun and artillery with explosive shells, they rarely failed to defeat African forces. All too often, battles were one-sided. In 1898, at Omdurman, a city in central Sudan near the junction of the White and Blue Nile rivers, British forces killed close to 20,000 Sudanese in a matter of hours while suffering only minor losses themselves. The only indigenous African state to resist colonization successfully was Ethiopia. In 1895, Italian forces invaded Ethiopia, anticipating an easy victory. But any designs to establish a colony were abandoned when the well-equipped Ethiopian army annihilated the Italians at the battle of Adwa in 1896. Besides Ethiopia, the only African state to remain independent was Liberia, a small republic in west Africa populated by freed slaves that was effectively a dependency of the United States.

Systems of Colonial Rule

In the wake of rapid conquest came problems of colonial occupation. Imperial powers commonly assumed that, following an initial modest investment, colonial administration would become financially self-sufficient. For decades, Europeans struggled to identify the ideal system of rule, only to learn that colonial rule in Africa could be maintained only through exceedingly high expenditures.

The earliest approach to colonial rule involved “concessionary companies.” European governments typically granted private companies large concessions of territory and empowered them to undertake economic activities such as mining, plantation agriculture, or railroad construction. Concessionary companies also had permission to implement systems of taxation and labor recruitment. Although that approach allowed European governments to colonize and exploit immense territories with only a modest investment in capital and personnel, company rule also brought liabilities. The brutal use of forced labor, which provoked a public outcry in Europe, and profits smaller than anticipated persuaded most European governments by the early twentieth century to curtail the powers of private companies and to establish their own rule, which took the form of either direct rule, typical of French colonies, or indirect rule, characteristic of British colonies.

Under direct rule, colonies featured administrative districts headed by European personnel who assumed responsibility for tax collection, labor and military recruitment, and the maintenance of law and order. Administrative boundaries intentionally cut across existing African political and ethnic boundaries to divide and weaken



Map 33.2 Imperialism in Africa, ca. 1914. Note the dramatic difference between the map of 1878 and the later map. How was it possible that Europeans were able to claim so much territory in such a short span of time?

Sources from the Past

Lord Lugard Justifies Imperialism and Indirect Rule in Africa

Frederick D. Lugard (1858–1945) played a major role in opening Africa to European colonialism. Born to missionary parents in Madras, India, he served as an army officer in Afghan, Sudan, and Burma. As an official of the British East Africa Company, he helped secure British rule in Uganda and persuaded his government to declare Uganda a protectorate in 1894. His name is especially associated with Nigeria, where as governor and governor-general (1912–1919) he welded the diverse territories of Nigeria into a single administrative unit and introduced a system of indirect rule. As the following passages show, Lugard was also an eloquent spokesperson for British imperialism in Africa.

The “Scramble for Africa” by the nations of Europe—an incident without parallel in the history of the world—was due to the growing commercial rivalry, which brought home to civilised nations the vital necessity of securing the only remaining fields for industrial enterprise and expansion. It is well, then, to realise that it is for our *advantage*—and not alone at the dictates of duty—that we have undertaken responsibilities in East Africa. It is in order to foster the growth of the trade of this country, and to find an outlet for our manufactures and our surplus energy, that our far-seeing statesmen and our commercial men advocate colonial expansion.

Money spent in such extension is circulated for the ultimate advantage of the masses. It is, then, beside the mark to argue that while there is want and misery at home money should not be spent in Africa. It has yet to be proved that the most effective way of relieving poverty permanently, and in accordance with sound political economy, is by distributing half-pence in the street. If our advent in Africa introduces civilisation, peace, and good government, abolishes the slave-trade, and effects other advantages for Africa, it must not be therefore supposed that this was our sole and only aim in going there. However greatly such objects may weigh with a large and powerful section of the nation, I do not believe that in these days our national policy is based on motives of philanthropy only. Though these may be our *duties*, it is quite possible that here (as frequently if not generally is the case) advantage may run parallel with duty. There are some who say we have no *right* in Africa at all, that “it belongs to the natives.” I hold that our

right is the necessity that is upon us to provide for our ever-growing population—either by opening new fields for emigration, or by providing work and employment which the development of over-sea extension entails—and to stimulate trade by finding new markets, since we know what misery trade depression brings at home.

While thus serving our own interests as a nation, we may, by selecting men of the right stamp for the control of new territories, bring at the same time many advantages to Africa. Nor do we deprive the natives of their birthright of freedom, to place them under a foreign yoke. It has ever been the key-note of British colonial method to rule through and by the natives, and it is this method, in contrast to the arbitrary and uncompromising rule of Germany, France, Portugal, and Spain, which has been the secret of our success as a colonising nation, and has made us welcomed by tribes and peoples in Africa, who ever rose in revolt against the other nations named. In Africa, moreover, there is among the people a natural inclination to submit to a higher authority. That intense detestation of control which animates our Teutonic races does not exist among the tribes of Africa, and if there is any authority that we replace, it is the authority of the Slavers and Arabs, or the intolerable tyranny of the “dominant tribe.”

FOR FURTHER REFLECTION

According to Lord Lugard, what aspects of European imperialism in Africa proved advantageous to Europeans at home?

SOURCE: Frederick D. Lugard. *The Rise of Our East African Empire*, 2 vols. Edinburgh and London: William Blackwood and Sons, 1893, 1:381–82.

potentially powerful indigenous groups. Direct rule aimed at removing strong kings and other leaders and replacing them with more malleable persons. Underlying the principle of direct rule was the desire to keep African populations in check and to permit European administrators to engage in a “civilizing mission.” However, that

approach to colonial rule presented its own difficulties. Key among them was the constant shortage of European personnel. For example, in French West Africa some thirty-six hundred Europeans tried to rule over an African population of more than nine million. The combination of long distances and slow transport limited effective communication between regional authorities and officials in remote areas. An inability to speak local languages and a limited understanding of local customs among European officials further undermined their effective administration.

The British colonial administrator Frederick D. Lugard (1858–1945) was the driving force behind the doctrine of indirect rule, which the British employed in many of their African colonies. In his book *The Dual Mandate in British Tropical Africa* (1922), he stressed the moral and financial advantages of exercising control over subject populations through indigenous institutions. He was particularly keen on using existing “tribal” authorities and “customary laws” as the foundation for colonial rule. Forms of indirect rule worked in regions where Africans had already established strong and highly organized states, but elsewhere erroneous assumptions concerning the “tribal” nature of African societies weakened the effectiveness of indirect rule. Bewildered by the complexities of African societies, colonial officials frequently imposed their own ideas of what constituted “tribal boundaries” or “tribal authorities.” The invention of rigid tribal categories and the establishment of artificial tribal boundaries became one of the greatest obstacles to nation building and regional stability in much of Africa during the second half of the twentieth century.

European Imperialism in the Pacific

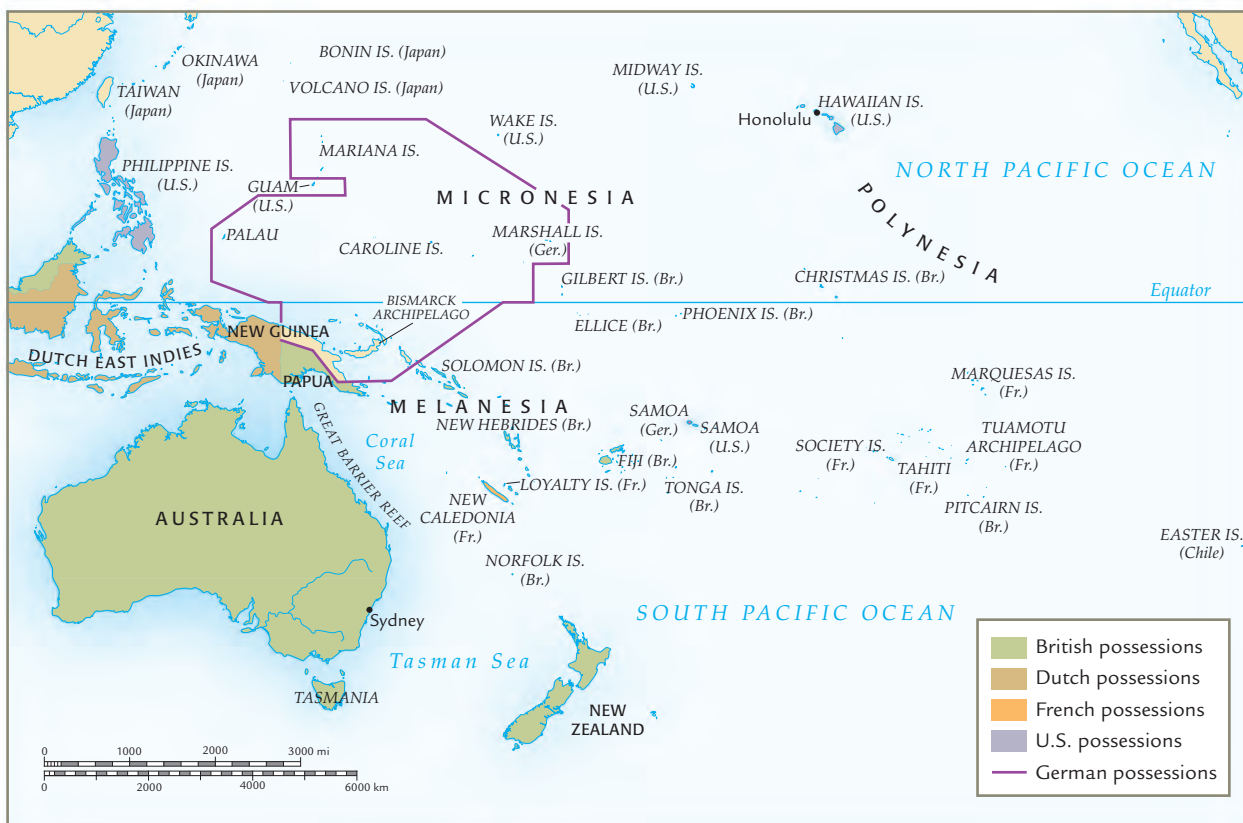
While scrambling for Africa, European imperial powers did not overlook opportunities to establish their presence in the Pacific Ocean basin. Imperialism in the Pacific took two main forms. In Australia and New Zealand, European powers established settler colonies and dominant political institutions. In most of the Pacific islands, however, they sought commercial opportunities and reliable bases for their operations but did not wish to go to the trouble or expense of outright colonization. Only in the late nineteenth century did they begin to impose direct colonial rule on the islands.

European mariners reconnoitered Australia and made occasional landfalls from the early sixteenth century, but only after the Pacific voyages of Captain James Cook did Europeans travel to the southern continent in large numbers. In 1770 Cook anchored his fleet for a week at Botany Bay, near modern Sydney, and reported that the region would be suitable for settlement. In 1788 a British fleet with about one thousand settlers, most of them convicted criminals, arrived at Sydney harbor and established the colony of New South Wales. The migrants supported themselves mostly by herding sheep. Lured by opportunity, voluntary migrants outnumbered convicts by the 1830s, and the discovery of gold in 1851 brought a surge in migration to Australia. European settlers established communities also in New Zealand. Europeans first visited New Zealand while hunting whales and seals, but the islands’ fertile soils and abundant stands of timber soon attracted their attention and drew large numbers of migrants.

European migration rocked the societies of Australia and New Zealand. Diseases such as smallpox and measles devastated indigenous peoples at the same time that European migrants flooded into their lands. The aboriginal population of Australia fell from about 650,000 in 1800 to 90,000 in 1900, whereas the European population rose from a few thousand to 3.75 million during the same period. Similarly, the population of indigenous Maori in New Zealand fell from about 200,000 in 1800 to 45,000 a century later, while European numbers climbed to 750,000.

Increasing migration also fueled conflict between European settlers and native populations. Large settler societies pushed indigenous peoples from their lands, often

Settler Colonies in the Pacific



Map 33.3 Imperialism in

Oceania, ca. 1914. Observe the many small, distant islands of the Pacific. Why would imperial powers have thought it so important to claim these islands in the late nineteenth and early twentieth centuries?

following violent confrontations. Because the nomadic foraging peoples of Australia did not occupy lands permanently, British settlers considered the continent *terra nullius*—“land belonging to no one”—that they could seize and put to their own uses. They undertook brutal military campaigns to evict aboriginal peoples from lands suitable for agriculture or herding. Despite native resistance, by 1900 the British had succeeded in displacing most indigenous Australians from their traditional lands and dispersing them throughout the continent.

A similarly disruptive process transpired in New Zealand. Representatives of the British government encouraged Maori leaders in 1840 to sign the Treaty of Waitangi, presumably designed to place New Zealand under British protection. Interpreted differently by the British and the Maori, the treaty actually signaled the coming of official British colonial control in New Zealand (1841) and thereafter inspired effective and long-lasting Maori opposition to British attempts to usurp their land and sovereignty. Conflicts over land confiscations and disputed land sales, for example, helped to spark the New Zealand Wars, a series of military confrontations between autonomous Maori groups and British troops and settlers that extended from the mid- to the late nineteenth century. Various Maori also cooperated in the Maori King Movement (or *Kingitanga*), beginning in 1856, as a means of forwarding Maori unity and sovereignty. While political and military battles continued, the British managed by the end of the century to force many Maori into poor rural communities separated from European settlements.

Even though imported diseases ravaged indigenous populations, the Pacific islands mostly escaped the fate of Australia and New Zealand, where settlers overwhelmed

Imperialists in Paradise

and overpowered native populations. During the nineteenth century the principal European visitors to Pacific islands were whalers, merchants, and missionaries. Whalers frequented ports where they could relax, refit their ships, and drink rum. Merchants sought fragrant sandalwood and succulent sea slugs, both of which fetched high prices in China. Missionaries established both Roman Catholic and Protestant churches throughout the Pacific Ocean basin. Naval vessels sometimes made a show of force or intervened in disputes between islanders and Europeans—or between competing groups of Europeans.



An anonymous contemporary painting depicts the signing of the Treaty of Waitangi on 6 February 1840. British military and colonial officials look on as about fifty Maori chiefs put their names to the document.

Through most of the nineteenth century, however, imperialist powers had no desire to establish direct colonial rule over Pacific islands.

That situation changed in the late nineteenth century. Just as nationalist rivalries drove the scramble for Africa, so they encouraged imperialist powers to stake their claims in the Pacific. In an era of global imperialism, European states sought reliable coaling stations for their steamships and ports for their navies. France established a protectorate in Tahiti, the Society Islands, and the Marquesas as early as 1841 and imposed direct colonial rule in 1880. France also annexed New Caledonia in 1853. Britain made Fiji a crown colony in 1874, and Germany annexed several of the Marshall Islands in 1876 and 1878. At the Berlin Conference, European diplomats agreed on a partition of Oceania as well as Africa, and Britain, France, Germany, and the United States proceeded to claim almost all of the Pacific islands. By 1900 only the kingdom of Tonga remained independent, and even Tonga accepted British protection against the possibility of encroachments by other imperial powers.

Quite apart from their value as ports and coaling stations, the Pacific islands offered economic benefits to imperial powers. Hawai'i and Fiji were the sites of productive sugarcane plantations. Samoa, French Polynesia, and many Melanesian and Micronesian islands were sources of copra—dried coconut, which produced high-quality vegetable oil for the manufacture of soap, candles, and lubricants. New Caledonia had rich veins of nickel, and many small Pacific islands had abundant deposits of guano—bird droppings that made excellent fertilizer.

The Emergence of New Imperial Powers

Nineteenth-century imperialism was mostly a European affair. Toward the end of the century, however, two new imperial powers appeared on the world stage: the United States and Japan. Both lands experienced rapid industrialization in the late nineteenth century, and both built powerful armed forces. As European imperial powers

planted their flags throughout the world, leaders of the United States and Japan decided that they too needed to establish a global imperial presence.

U.S. Imperialism in Latin America and the Pacific

The very existence of the United States was due to European imperialism. After the new republic had won its independence, U.S. leaders pursued their manifest destiny and brought almost all the temperate regions of North America under their authority. Like British migrants in Australia and New Zealand, Euro-American cultivators pushed indigenous peoples onto marginal lands and reservations. This domination of the North American continent represents a part of the larger story of European and Euro-American imperialism.

The Monroe Doctrine

The fledgling United States also tried to wield power outside North America. In 1823 President James Monroe (in office 1817–1825) issued a proclamation that warned European states against imperialist designs in the western hemisphere. In essence Monroe claimed the Americas as a U.S. protectorate, and his proclamation, known as the Monroe Doctrine, served as a justification for later U.S. intervention in hemispheric affairs. Until the late nineteenth century, the United States mostly exercised informal influence in the Americas and sought to guarantee free trade in the region. That policy benefited U.S. entrepreneurs and their European counterparts who worked to bring the natural resources and agricultural products of the Americas to the world market.

As the United States consolidated its continental holdings, U.S. leaders became interested in acquiring territories beyond the temperate regions of North America. In 1867 the United States purchased Alaska from Russia and in 1875 it claimed a protectorate over the islands of Hawai'i, where U.S. entrepreneurs had established highly productive sugarcane plantations. The Hawaiian kingdom survived until 1893, when a group of planters and businesspeople overthrew the last monarch, Queen Lili'uokalani (reigned 1891–1893), and invited the United States to annex the islands. U.S. president Grover Cleveland (in office 1885–1889 and 1893–1897) opposed annexation, but his successor, William McKinley (in office 1897–1901), was more open to American expansion and agreed to acquire the islands as U.S. possessions in 1898.

The Spanish-Cuban-American War

The United States emerged as a major imperial and colonial power after the brief Spanish-Cuban-American War (1898–1899). War broke out as anticolonial tensions mounted in Cuba and Puerto Rico—the last remnants of Spain's American empire—where U.S. business interests had made large investments. In 1898 the U.S. battleship *Maine* exploded and sank in Havana harbor. U.S. leaders claimed sabotage and declared war on Spain. The United States easily defeated Spain and took control and possession of Cuba and Puerto Rico. After the U.S. navy destroyed the Spanish fleet at Manila in a single day, the United States also took possession of Guam and the Philippines, Spain's last colonies in the Pacific, to prevent them from falling under German or Japanese control.

The United States quickly established colonial governments in most of its new possessions. Instability and disorder prompted the new imperial power to intervene also in the affairs of Caribbean and Central American lands, even those that were not U.S. possessions, to prevent rebellion and protect American business interests. U.S. military forces occupied Cuba, the Dominican Republic, Nicaragua, Honduras, and Haiti in the early twentieth century.

The consolidation of U.S. authority in the Philippines was an especially difficult affair. The Spanish-Cuban-American War coincided with a Filipino revolt against Spanish rule, and U.S. forces promised to support independence of the Philippines in exchange for an alliance against Spain. After the victory over Spain, however, Presi-

dent William McKinley decided to bring the Philippines under American control. The United States paid Spain twenty million dollars for rights to the colony, which was important to American businesspeople and military leaders because of its strategic position in the South China Sea. Led by Emilio Aguinaldo—known to his followers as the George Washington of his country—Filipino rebels turned their arms against the new intruders. The result was a bitter insurrection that raged until 1902 and flared sporadically until 1906. The conflict claimed the lives of 4,200 American soldiers, 15,000 rebel troops, and some 200,000 Filipino civilians.

To facilitate communication and transportation between the Atlantic and the Pacific oceans, the United States sought to build a canal across some narrow stretch

of land in Central America. Engineers identified the isthmus of Panama in northern Colombia as the best site for a canal, but Colombia was unwilling to cede land for the project. Under President Theodore Roosevelt (in office 1901–1909), an enthusiastic champion of imperial expansion, the United States supported a rebellion against Colombia in 1903 and helped rebels establish the breakaway state of Panama. In exchange for this support, the United States won the right to build a canal across Panama and to control the adjacent territory, known as the Panama Canal Zone. Given this expansion of U.S. interests in Latin America, Roosevelt added a corollary to the Monroe Doctrine in 1904. The “Roosevelt Corollary” exerted the U.S. right to intervene in the domestic affairs of nations within the hemisphere if they demonstrated an inability to maintain the security deemed necessary to protect U.S. investments. The Roosevelt Corollary, along with the Panama Canal when it opened in 1914, strengthened U.S. military and economic claims.

Imperial Japan

Strengthened by rapid industrialization during the Meiji era, Japan joined the ranks of imperial powers in the late nineteenth century. Japanese leaders deeply resented the unequal treaties that the United States and European powers forced them to accept in the 1860s. They resolved to eliminate the diplomatic handicaps imposed by the treaties and to raise Japan’s profile in the world. While founding representative political institutions to demonstrate their trustworthiness to American and European



Queen Lili'uokalani, last monarch of Hawai'i, before her deposition in 1893. Wearing a European dress, the queen sits on a throne covered with a traditional royal cape made of bird feathers.

The Panama Canal

Early Japanese Expansion

diplomats, Japanese leaders also made a bid to stand alongside the world's great powers by launching a campaign of imperial expansion.

The Japanese drive to empire began in the east Asian islands. During the 1870s Japanese leaders consolidated their hold on Hokkaido and the Kurile Islands to the north, and they encouraged Japanese migrants to populate the islands to forestall Russian expansion there. By 1879 they had also established their hegemony over Okinawa and the Ryukyu Islands to the south.

In 1876 Japan purchased modern warships from Britain, and the newly strengthened Japanese navy immediately began to flex its muscles in Korea. After a confrontation between the Korean navy and a Japanese surveying vessel, Meiji officials dispatched a gunboat expedition and forced Korean leaders to submit to the same kind of unequal treaty that the United States and European states had imposed on Japan. As European and U.S. imperialists divided up the world in the 1880s and 1890s, Meiji political and military leaders made plans to project Japanese power abroad. They developed contingency plans for a conflict with China, staged maneuvers in anticipation of a continental war, and built a navy with the capacity to fight on the high seas.

The Sino-Japanese War

Conflict erupted in 1894 over the status of Korea. Taking advantage of the unequal treaty of 1876, Japanese businesses had substantial interests in Korea. When an antiforeign rebellion broke out in Korea in 1893, Meiji leaders feared that the land might fall into anarchy and become an inviting target of European and U.S. imperialism. Qing rulers sent an army to restore order and reassert Chinese authority in Korea, but Meiji leaders were unwilling to recognize Chinese control over a land so important to Japanese business interests. Thus in August 1894 they declared war on China. The Japanese navy quickly gained control of the Yellow Sea and demolished the Chinese fleet in a battle lasting a mere five hours. The Japanese army then pushed Qing forces out of the Korean peninsula. Within a few months the conflict was over. When the combatants made peace in April 1895, Qing authorities recognized the independence of Korea, thus making it essentially a dependency of Japan. They also ceded Taiwan, the Pescadores Islands, and the Liaodong peninsula, which strengthened Japanese control over east Asian waters. Alongside territorial acquisitions, Japan gained unequal treaty rights in China like those enjoyed by European and American powers.

The unexpected Japanese victory startled European imperial powers, especially Russia. Tensions between Japan and Russia soon mounted, as both imperial powers had territorial ambitions in the Liaodong peninsula, Korea, and Manchuria. During the late 1890s Japanese military leaders vastly strengthened both their navy and their army with an eye toward a future conflict with Russia.

The Russo-Japanese War

War broke out in 1904, and Japanese forces overran Russian installations before reinforcements could arrive from Europe. The enhanced Japanese navy destroyed the Russian Baltic fleet, which had sailed halfway around the world to support the war effort. By 1905 the war was over, and Japan won international recognition of its colonial authority over Korea and the Liaodong peninsula. Furthermore, Russia ceded the southern half of Sakhalin island to Japan, along with a railroad and economic interests in southern Manchuria. Victory in the Russo-Japanese War transformed Japan into a major imperial power.

Legacies of Imperialism

Imperialism and colonialism profoundly influenced the development of world history. In some ways they tightened links between the world's peoples: trade and migration increased dramatically as imperial powers exploited the resources of subject

lands and recruited labor forces to work in colonies throughout the world. Yet imperialism and colonialism also brought peoples into conflict and heightened senses of difference between peoples. European, Euro-American, and Japanese imperialists all came to think of themselves as superior to the peoples they overcame. Meanwhile, foreign intrusion stimulated the development of national identities in colonized lands, and over time these national identities served as a foundation for anticolonial independence movements.

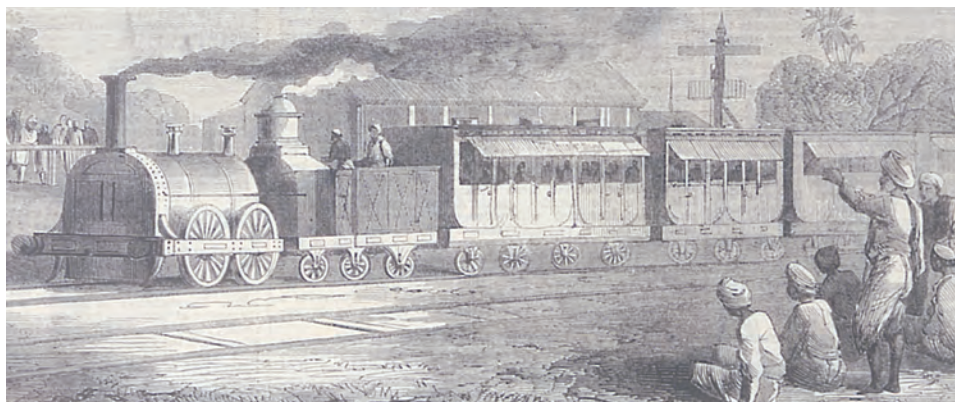
Empire and Economy

One of the principal motives of imperialism was the desire to gain access to natural resources and agricultural products. As imperial powers consolidated their hold on foreign lands, colonial administrators reorganized subject societies so they would become efficient suppliers of timber, rubber, petroleum, gold, silver, diamonds, cotton, tea, coffee, cacao, and other products as well. As a result, global trade in those commodities surged during the nineteenth and early twentieth centuries. The advantages of that trade went mostly to the colonial powers, whose policies encouraged their subject lands to provide raw materials for processing in the industrialized societies of Europe, North America, and Japan.

Sometimes colonial rule transformed the production of crops and commodities that had long been prominent in subject societies. In India, for example, the cultivation of cotton began probably before 5000 B.C.E. For most of history, cultivators spun thread and wove their own cotton textiles or else supplied local artisans with raw materials. In the nineteenth century, however, colonial administrators reoriented the cultivation of cotton to serve the needs of the emerging British textile industry. They encouraged cultivators to produce cotton for export rather than for local consumption, and they built railroads deep into the subcontinent to transport raw cotton to the coast quickly, before rain and dust could spoil the product. They shipped raw cotton to England, where mechanized factories rapidly turned out large volumes of high-quality textiles. They also allowed the import of inexpensive British textiles, which undermined Indian cotton cloth production. The value of raw cotton exported from India went from 10 million rupees in 1849 to 60 million rupees in 1860 and 410 million rupees in 1913, whereas the value of finished cotton products imported into India rose from 50,000 rupees in 1814 to 5.2 million rupees in 1829 and 30 million rupees in 1890. Thus colonial policies transformed India from the world's principal center of cotton manufacture to a supplier of raw cotton and a consumer of textiles produced in the British isles.

In some cases, colonial rule led to the introduction of new crops that transformed both the landscape and the social order of subject lands. In the early nineteenth century, for example, British colonial officials introduced tea bushes from China to Ceylon and India. The effect on Ceylon was profound. British planters felled trees in much of the island, converted rain forests into tea plantations, and recruited Ceylonese women by the thousands to carry out the labor-intensive work of harvesting mature tea leaves. Consumption of tea in India and Ceylon was almost negligible, so increased supplies met the growing demand for tea in Europe, where the beverage became accessible to individuals of all social classes. The value of south Asian tea exports rose from about 309,000 pounds sterling in 1866 to 4.4 million pounds sterling in 1888 and 6.1 million pounds sterling in 1900. Malaya and Sumatra underwent a similar social transformation after British colonial agents planted rubber trees there in the 1870s and established plantations to meet the growing global demand for rubber products.

Economic and Social Changes



An engraving depicts the East India Railway about 1863. Though originally built to transport goods, railroads quickly became a popular means of passenger travel in India.

Labor Migrations

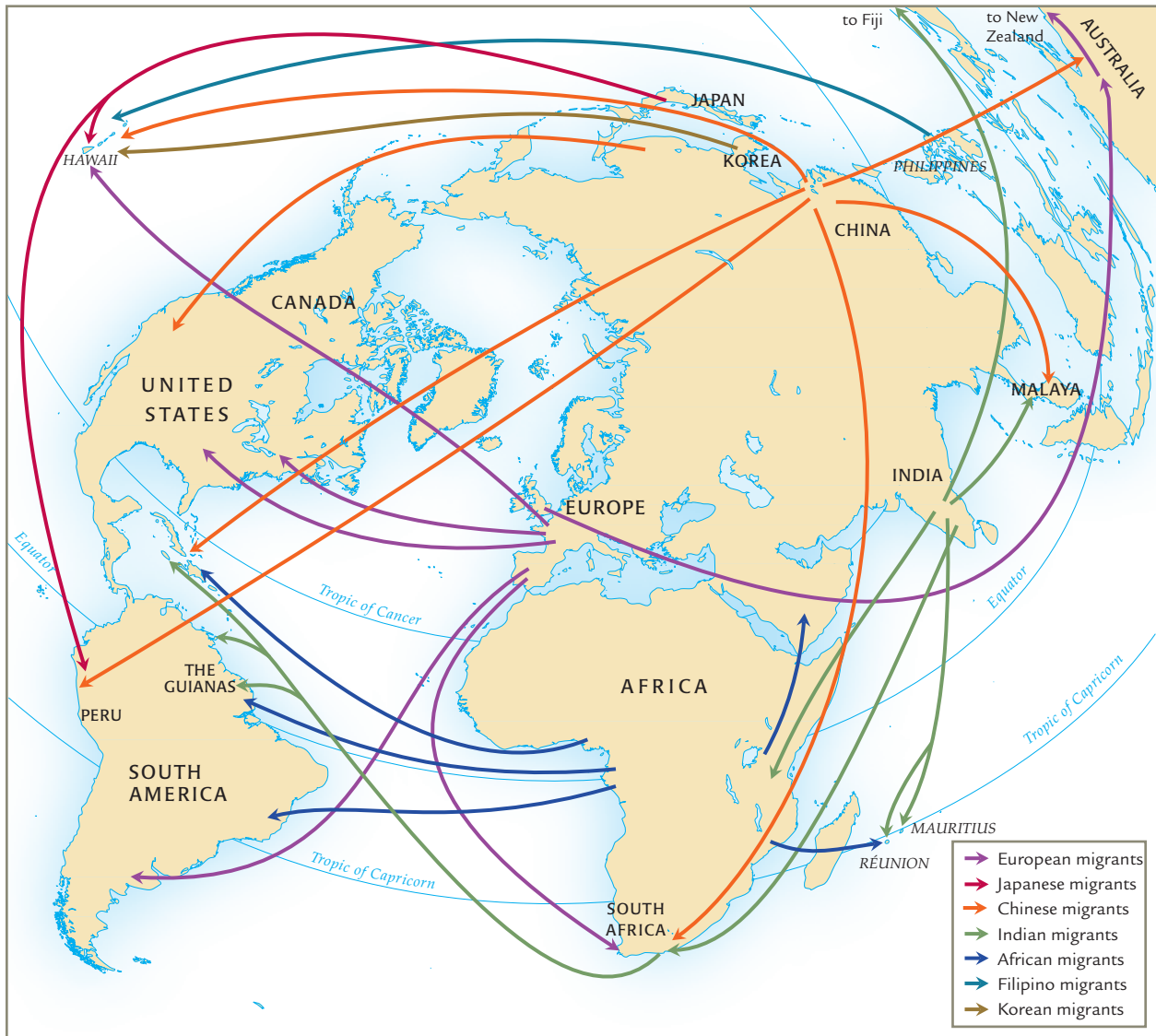
Efforts to exploit the natural resources and agricultural products of subject lands led imperial and colonial powers to encourage mass migrations of workers during the nineteenth and early twentieth centuries. Two patterns of labor migration were especially prominent during the imperial and colonial era. European migrants went mostly to temperate lands, where they worked as free cultivators or industrial laborers. In contrast, migrants from Asia, Africa, and the Pacific islands moved largely to tropical and subtropical lands, where they worked as indentured laborers on plantations or manual laborers for mining enterprises or large-scale construction projects. Between them, these two streams of labor migration profoundly influenced the development of societies, especially in the Americas and the Pacific basin.

European Migration

Between 1800 and 1914 some fifty million European migrants left their homes and sought opportunities overseas. Most of those migrants left the relatively poor agricultural societies of southern and eastern Europe, especially Italy, Russia, and Poland, although sizable numbers came also from Britain, Ireland, Germany, and Scandinavia. A majority of the migrants—about thirty-two million—went to the United States. Many of the early arrivals went west in search of cheap land to cultivate. Later migrants settled heavily in the northeast, where they provided the labor that drove U.S. industrialization after the 1860s. Settler colonies in Canada, Argentina, Australia, New Zealand, and south Africa also drew large numbers of European migrants, who mostly became free cultivators or herders but sometimes found employment as skilled laborers in mines or fledgling industries. Most European migrants traveled as free agents, but some went as indentured laborers. All of them were able to find opportunities in temperate regions of the world because of European and Euro-American imperialism in the Americas, south Africa, and Oceania.

Indentured Labor Migration

In contrast to their European counterparts, migrants from Asia, Africa, and the Pacific islands generally traveled as indentured laborers. As the institution of slavery went into decline, planters sought large numbers of laborers to replace slaves who left the plantations. The planters relied primarily on indentured laborers recruited from relatively poor and densely populated lands. Between 1820 and 1914 about 2.5 million indentured laborers left their homes to work in distant parts of the world. Labor recruiters generally offered workers free passage to their destinations and provided them with food, shelter, clothing, and modest compensation for their services in



Map 33.4 Imperialism and migration during the nineteenth and early twentieth centuries. An unprecedented intercontinental migration of people characterized the age of imperialism. What factors encouraged and facilitated migration on this extraordinary scale?

exchange for a commitment to work for five to seven years. Sometimes recruiters also offered free return passage to workers who completed a second term of service.

The majority of the indentured laborers came from India, but sizable numbers also came from China, Japan, Java, Africa, and the Pacific islands. Indentured laborers went mostly to tropical and subtropical lands in the Americas, the Caribbean, Africa, and Oceania. The indentured labor trade began in the 1820s when French and British colonial officials sent Indian migrants to work on sugar plantations in the Indian Ocean islands of Réunion and Mauritius. The arrangement worked well, and large numbers of Indian laborers later went to work on rubber plantations in Malaya and sugar plantations in south Africa, the Pacific island of Fiji, the Guianas, and the Caribbean islands of Trinidad, Tobago, and Jamaica. After the Opium War, recruiters began to seek workers in China. Large numbers of Chinese laborers went to sugar plantations in Cuba and Hawai'i, guano mines in Peru, tin mines in Malaya, gold mines in south Africa and Australia, and railroad construction sites in the United States, Canada, and Peru. After

the Meiji restoration in Japan, a large contingent of Japanese laborers migrated to Hawai'i to work on sugar plantations, and a smaller group went to work in guano mines in Peru. Indentured laborers from Africa went mostly to sugar plantations in Réunion, the Guianas, and Caribbean islands. Those from Pacific islands went mostly to plantations in other Pacific islands and Australia.

Empire and Migration

All those large-scale migrations of the nineteenth century reflected the global influence of imperial powers. European migrations were possible only because European and Euro-American peoples had established settler societies in temperate regions around the world. Movements of indentured laborers were possible because colonial officials were able to recruit workers and dispatch them to distant lands where their compatriots had already established plantations or opened mines. In combination the nineteenth-century migrations profoundly influenced societies around the world by depositing large communities of people with distinctive ethnic identities in lands far from their original homes.

Empire and Society

Colonial Conflict

The policies adopted by imperial powers and colonial officials forced peoples of different societies to deal with one another on a regular and systematic basis. Their interactions often led to violent conflicts between colonizers and subject peoples. The sepoy rebellion was the most prominent effort to resist British colonial authority in India, but it was only one among thousands of insurrections organized by discontented Indian subjects between the mid-nineteenth and the mid-twentieth centuries. Colonized lands in southeast Asia and Africa also became hotbeds of resistance, as subject peoples revolted against foreign rule, tyrannical behavior of colonial officials, the introduction of European schools and curricula, high taxation, and requirements that subject peoples cultivate certain crops or provide compulsory labor for colonists' enterprises.

Many rebellions drew strength from traditional religious beliefs, and priests or prophets often led resistance to colonial rule. In Tanganyika, for example, a local prophet organized the large-scale Maji Maji rebellion (1905–1906) to expel German colonial authorities from east Africa. Rebels sprinkled themselves with *maji-maji* (“magic water”), which they believed would protect them from German weapons. The magic water was ineffective, and as many as seventy-five thousand insurgents died in the conflict. Nevertheless, rebellion was a constant threat to colonial rule. Even when subject peoples dared not revolt, since they could not match European weaponry, they resisted colonial rule by boycotting European goods, organizing political parties and pressure groups, publishing anticolonial newspapers and magazines, and pursuing anticolonial policies through churches and religious groups.

Colonial policies also led to conflicts among peoples brought together artificially into multicultural societies. When indentured laborers from different societies congregated on plantations, for example, tensions quickly developed between workers and their supervisors and among different groups of workers themselves. In Hawai'i, one of the most diverse multicultural societies created by the labor migrations of the nineteenth century, workers on sugar plantations came primarily from China, Japan, and Portugal, but there were also sizable contingents from the Philippines, Korea, and other Pacific islands. Workers and their families normally lived in villages dominated by their own ethnic groups, but there were plentiful opportunities for individuals and groups to mix with one another at work, at play, or in the larger society. Although the various ethnic communities readily adopted their neighbors' foods and sometimes took spouses from other groups, linguistic, religious, and cultural differences provided a foundation for strong ethnic identities throughout the plantation era and beyond.

Scientific Racism

Social and cultural differences were the foundation of an academic pursuit known as scientific racism, which became prominent especially after the 1840s. Theorists such as the French nobleman Count Joseph Arthur de Gobineau (1816–1882) took race as the most important index of human potential. In fact, there is no such thing as a biologically pure race, but nineteenth-century theorists assumed that the human species consisted of several distinct racial groups. In his dense, four-volume *Essay on the Inequality of the Human Races* (1853–1855), Gobineau divided humanity into four main racial groups, each of which had its own peculiar traits. Gobineau characterized Africans as unintelligent and lazy; Asians as smart but docile; the native peoples of the Americas as dull and arrogant; and Europeans as intelligent, noble, and morally superior to others. Throughout the later nineteenth and early twentieth centuries, racist thinkers sought to identify racial groups on the basis of skin color, bone structure, nose shape, cranial capacity, and other physical characteristics. Agreeing uniformly that Europeans were superior to other peoples, race theorists clearly reflected the dominance of European imperial powers in the larger world.

After the 1860s, scientific racists drew heavily from the writings of Charles Darwin (1809–1882), an English biologist whose book *The Origin of Species* (1859) argued that all living species had evolved over thousands of years in a ferocious contest for survival. Species that adapted well to their environment survived, reproduced, and flourished, according to Darwin, whereas others declined and went into extinction. The slogan “survival of the fittest” soon became a byword for Darwin’s theory of evolution. Theorists known as social Darwinists seized on those ideas, which Darwin had applied exclusively to biological matters, and adapted them to explain the development of human societies. The English philosopher Herbert Spencer (1820–1903) relied on theories of evolution to explain differences between the strong and the weak: successful individuals and races had competed better in the natural world and consequently evolved to higher states than did other, less fit peoples. On the basis of that reasoning, Spencer and others justified the domination of European imperialists over subject peoples as the inevitable result of natural scientific principles.



Apollo Belvidere



Greek



Negro



Creole Negro



Young chimpanzee



Young chimpanzee

Scientific racists often argued that Europeans had reached a higher stage of evolution than other peoples. An illustration from a popular book by Josiah Clark Nott and G. R. Glidden, *Indigenous Races of the Earth*, deliberately distorted facial and skull features to suggest a close relationship between African peoples and chimpanzees.

Popular Racism

On a more popular level, there was no need for elaborate scientific theories to justify racist prejudices. Representatives of imperial and colonial powers routinely adopted racist views on the basis of personal experience, which seemed to teach their superiority to subject peoples. In 1896, for example, the British military officer Colonel Francis Younghusband reflected on differences between peoples that he noticed during his travels throughout China, central Asia, and India. He granted that Asian peoples were physically and intellectually equal to Europeans, but he held that

no European can mix with non-Christian races without feeling his moral superiority over them. He feels, from the first contact with them, that whatever may be their relative positions from an intellectual point of view, he is stronger morally than they are. And facts show that this feeling is a true one. It is not because we are any cleverer than the natives of India, because we have more brains or bigger heads than they have, that we rule India; but because we are stronger morally than they are. Our superiority over them is not due to mere sharpness of intellect, but to that higher moral nature to which we have attained in the development of the human race.

Racist views were by no means a monopoly of European imperialists: U.S. and Japanese empire builders also developed a sense of superiority over the peoples they conquered and ruled. U.S. forces in the Philippines disparaged the rebels they fought there as “gooks,” and they did not hesitate to torture enemies in a conflict justified by President McKinley as an effort to “civilize and Christianize” the Filipinos. In the 1890s Japanese newspapers portrayed Chinese and Korean peoples as dirty, backward, stupid, and cowardly. Some scholars concocted speculative theories that the Japanese people were more akin to the “Aryans,” who supposedly had conquered much of the Eurasian landmass in ancient times, than to the “Mongolians” who populated China and Korea. After their victory in the Russo-Japanese War, political and military leaders came to believe that Japan had an obligation to oversee the affairs of their backward neighbors and help civilize their little Asian brothers.

Nationalism and Anticolonial Movements

While imperialists convinced themselves of their racial superiority, colonial rule provoked subject peoples to develop a sense of their own identities. Just as Napoleon’s invasions aroused national feelings and led to the emergence of nationalist movements in Europe, so imperial expansion and colonial domination prompted the formation of national identities and the organization of anticolonial movements in subject lands. The potential of imperialism and colonialism to push subject peoples toward nationalism was most evident in India.

Ram Mohan Roy

During the nineteenth century, educated Indian elites helped forge a sense of Indian identity. Among the most influential of them was Ram Mohan Roy (1772–1833), a prominent Bengali intellectual sometimes called the “father of modern India.” Roy argued for the construction of a society based on both modern European science and the Indian tradition of devotional Hinduism. He supported some British colonial policies, such as the campaign to end the practice of sati, and he worked with Christian social reformers to improve the status of women by providing them with education and property rights. Yet Roy saw himself as a Hindu reformer who drew inspiration from the Vedas and Upanishads and who sought to bring Hindu spirituality to bear on the problems and conditions of his own time. During the last two decades of his life, Roy tirelessly published newspapers and founded societies to mobilize educated Hindus and advance the cause of social reform in colonial India.



Much of western India experienced severe famine in 1896–1897, and epidemics of bubonic plague broke out among weakened populations. British relief efforts were often heavy-handed and insensitive, and they did little to alleviate the problems.

Reform societies flourished in nineteenth-century India. Most of them appealed to upper-caste Hindus, but some were Muslim organizations, and a few represented the interests of peasants, landlords, or lower castes. After midcentury, reformers increasingly called for self-government or at least greater Indian participation in government. Their leaders often had received an advanced education at British universities, and they drew inspiration from European Enlightenment values such as equality, freedom, and popular sovereignty. But they invoked those values to criticize the British colonial regime in India and to call for political and social reform.

The most important of the reform groups was the Indian National Congress, founded in 1885, with British approval, as a forum for educated Indians to communicate their views on public affairs to colonial officials. Representatives from all parts of the subcontinent aired grievances about Indian poverty, the transfer of wealth from India to Britain, trade and tariff policies that harmed Indian businesses, the inability of colonial officials to provide effective relief for regions stricken by drought or famine, and British racism toward Indians. By the end of the nineteenth century, the congress openly sought Indian self-rule within a larger imperial framework. In 1916 the congress joined forces with the All-India Muslim League, the most prominent organization working to advance the political and social interests of Muslims, who made up about 25 percent of the Indian population.

Faced with increasing demands for Indian participation in government, in 1909 colonial authorities granted a limited franchise that allowed wealthy Indians to elect representatives to local legislative councils. By that time, however, the drive for political reform had become a mass movement. Indian nationalists called for immediate independence, mounted demonstrations to build support for their cause, and organized boycotts of British goods. A few zealous nationalists turned to violence and sought to undermine British rule by bombing government buildings and assassinating colonial officials. Going into the twentieth century, Indian nationalism was a powerful movement that would bring independence from colonial rule in 1947.

The Indian National Congress

Although local experiences varied considerably, Indian nationalism and independence movements served as models for anticolonial campaigns in other lands. In almost all cases the leaders of those movements were European-educated elites who absorbed Enlightenment values and then turned those values into an attack on European colonial rule in foreign lands.

The construction of global empires in the nineteenth century noticeably increased the tempo of world integration. Armed with powerful transportation, communication, and military technologies, European peoples imposed their rule on much of Asia and almost all of Africa. They wielded enormous influence throughout the world, even where they did not establish imperial control, because of their wealth and economic power. Toward the end of the nineteenth century, the United States and Japan joined European states as global imperialists. All the imperial powers profoundly influenced the development of the societies they ruled. They shaped the economies and societies of their colonies by pushing them to supply natural resources and agricultural commodities in exchange for manufactured products. They created multicultural societies around the world by facilitating the movement of workers to lands where there was high demand for labor on plantations or in mines. They unintentionally encouraged the emergence of independence movements by provoking subject peoples to develop a sense of national identity. From the early twentieth century forward, much of global history has revolved around issues stemming from the world order of imperialism and colonialism.

C H R O N O L O G Y	
1772–1833	Life of Ram Mohan Roy
1809–1882	Life of Charles Darwin
1816–1882	Life of Count Joseph Arthur de Gobineau
1824	Founding of Singapore by Thomas Stamford Raffles
1840	Treaty of Waitangi
1853–1902	Life of Cecil Rhodes
1857	Sepoy rebellion
1859–1869	Construction of the Suez Canal
1860–1864	Land wars in New Zealand
1865–1909	Reign of King Leopold II of Belgium
1884–1885	Berlin West Africa Conference
1885	Founding of the Indian National Congress
1894–1895	Sino-Japanese War
1897–1901	Term of office of U.S. president William McKinley
1898–1899	Spanish-Cuban-American War
1899–1902	South African War (Boer War)
1901–1909	Term of office of U.S. president Theodore Roosevelt
1904–1905	Russo-Japanese War
1904–1914	Construction of the Panama Canal
1905–1906	Maji Maji rebellion
1906	Founding of All-India Muslim League

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