Journey Through History - New Topic-based Series

Study Notes

Topic 6:
European colonial expansion

CONCEPT MAP

Background of and reasons for the early expansion (early-16th to late-18th centuries) *(p.107-108)*

Background of and reasons for the later expansion (late-19th to early-20th centuries)

Background *(p.107)*

- Discovery of new sea routes and new lands: Europeans successfully opened up new sea routes to Asia and Africa, and also discovered the Americas.

Main reasons *(p.108)*

- Political aspect: expansion of territory
- Economic aspect: developing trade and exploiting local resources
- Social and cultural aspects: spreading Christianity and the pursuit of religious freedom

Background *(p.112-113)*

- Ambition enhanced by early colonial expansion
- Independence of colonies in the Americas
- Supremacy of European countries

Main reasons *(p.113-114)*

- Economic aspect
- Strong demands for resources and markets
- Huge population and resources in Asia and Africa
- Political aspect
- Limited room for expansion in Europe
- Rise and development of nationalism
- Social and cultural aspects: Ideas of the 'white man's burden' and spreading Christianity

Making and formation of colonial policy *(p.118)*

- Earlier on: focused mainly on trade and resources
- Later: more concerned with extending their rule overseas

Ways of European colonial expansion *(p.119-125)*

- Political expansion: Establishing footholds, spheres of influence, protectorates and colonies
- Economic expansion: Exploitation of resources (natural, land and human resources), Control over colonial markets
- Social and cultural expansion: Spreading religion and culture

Impact of European colonial expansion *(p.126-132)*

Impact on Europe *(p.126)*

- Forming a European-centred world economic system
- Causing colonial disputes and conflicts

Impact on the Americas, Asia and Africa *(p.128-132)*

- Political aspect: accelerating modernization, causing discrimination and oppression
- Economic aspect：Infrastructure improvement, causing economic exploitation and destruction of traditional economy
- Social and cultural aspects: Improvements in education and living standards, problems of plagues and slavery and changes in population structure

A.   Introduction to European colonial expansion

- From the 16th to the early 20th centuries, European countries carried out colonial expansion. This period can be further divided into two stages.

■   **Early 16th to late 18th centuries - Early expansion**

- Following the start of the Voyages of Discovery in the 15th century, European countries began to expand overseas.
- From the early 16th to the late 18th centuries, they expanded into Asia, Africa and the Americas in various ways, mainly in the Americas.
- This wave of colonial expansion is called the 'Old Imperialism'.

■   **Late 19th to early 20th centuries - Later expansion**

- In the late 19th century, European countries started a new round of expansion in Asia and Africa. Several new colonial countries became involved in the expansion.
- By the early 20th century, most of Africa and Southeast Asia had become European colonies.
- This wave of colonial expansion is known as the 'New Imperialism'.

	Early colonial expansion	**Later colonial expansion**
Period	Early 16th - late 18th centuries	Late 19th - early 20th centuries
Major European countries involved	Portugal, Spain, the Netherlands, Britain, France	Britain, France, Germany, Italy
Background	Discovery of new sea routes and new lands	• Ambition enhanced by the early colonial expansion • Independence of the colonies in the Americas • Supremacy of European countries
Reasons	• **Political aspect**: to expand territories • **Economic aspect**: to expand trade and plunder local resources • **Social and cultural aspects**: to spread Christianity and pursue religious freedom	• **Political aspect**: limited room for territorial expansion in Europe; rise and development of nationalism • **Economic aspect**: strong demand for resources and markets; huge population and resources in Asia and Africa • **Social and cultural aspects**: idea of the 'white man's burden' and to preach

B.   Reasons for European colonial expansion

1.   Background of and reasons for the early expansion
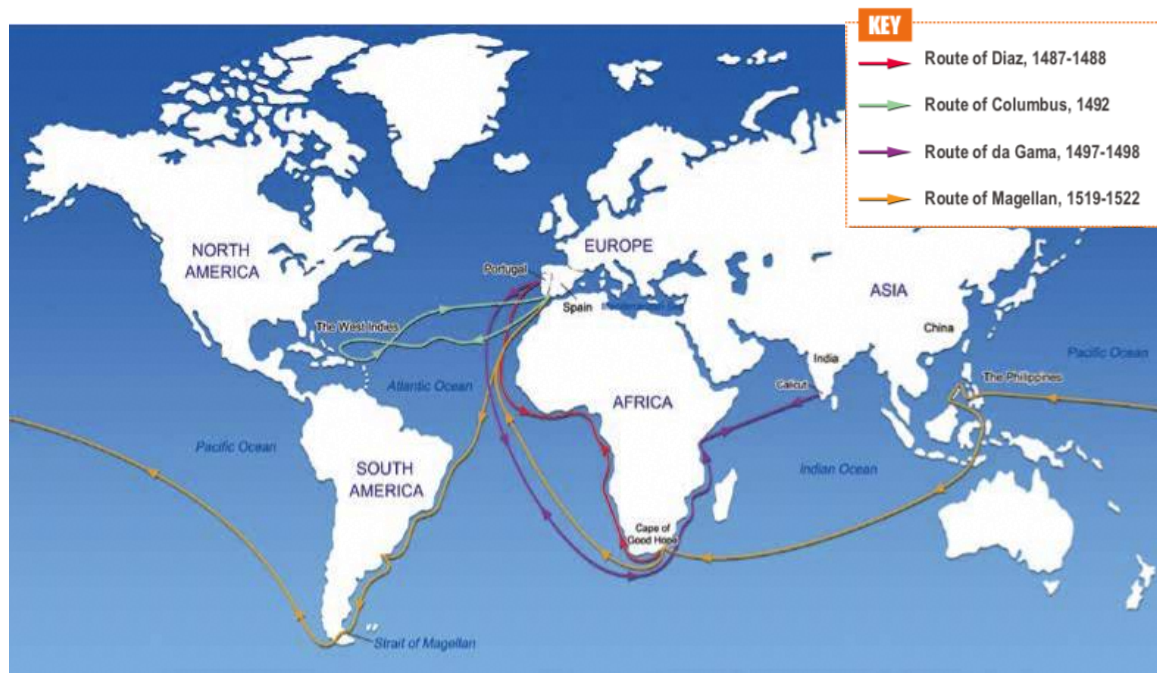
(a) Background: discovery of new sea routes and new lands

- In the 15th and 16th centuries, European navigators started naval explorations. The Voyages of Discovery made great achievements.
- Europeans successfully opened up new sea routes to Asia and Africa. They also discovered the Americas.
  - This broadened their horizons greatly. They built coastal footholds in **the Americas, Asia and Africa**, laying the foundations for future expansion.

1. Sailed directly from Western Europe to India	In 1488, Portuguese navigator Diaz sailed from Western Europe to the Cape of Good Hope, Africa. Between 1497 and 1498, Portuguese navigator da Gama sailed around the Cape of Good Hope and reached Calicut, India. His journey opened up a new direct sea route from Western Europe to India.	**Diaz**
2. Discovered the Americas	In 1492, Italian navigator Columbus led a Spanish fleet and sailed westwards. He reached present-day West Indies, which includes the Bahamas and Cuba. Columbus discovered the Americas hitherto unknown to Europeans.	**Columbus**
3. Completed the first circumnavigation of Earth	In 1519, Portuguese navigator Magellan led a Spanish fleet and sailed westwards. He reached the southern tip of the Americas and sailed to the Pacific. In 1522, his fleet returned to Spain. This was the first global circumnavigation.	**Magellan**

Major voyages between 1487 and 1522

(b) Main reasons

(i)   Political aspect

•   After the discovery of new sea routes and new lands, strong European kings
     wanted to expand into Asia and Africa to increase their territories and economic
     power. This could enhance their prestige.

(ii)   Economic aspect

•   Mercantilism, an economic theory stressing the accumulation of wealth, began to
     rise in Europe in the 16th century. It reached its climax in the 17th and 18th
     centuries.
•   Under the influence of Mercantilism, European countries sped up overseas
     expansion to develop trade and exploit local resources.

(iii) Social and cultural aspects

•   Europeans wanted to expand overseas to spread Christianity.
•   Some supported exploring new lands in pursuit of freedom.
     - For example, British Puritans, in pursuit of religious freedom, became the
       early colonists in North America.

*European colonies in the Americas
in the mid-18th century*

1. Background of and reasons for the later expansion

- In the late 19th century, European countries were more ambitious and powerful. They started a new wave of colonial expansion and actively built colonies in **Asia** and **Africa**.

(a) Background

(i)   Ambition enhanced by early colonial expansion

- After the Voyages of Discovery, European countries competed to build overseas trading footholds and colonies. A European-centred world trading system was formed.
- Economic exploitation created wealth, and thus European countries became more ambitious to expand overseas. Existing footholds became the bases for expanding colonial rule.

(ii)   Independence of colonies in the Americas

- In the 18th and 19th centuries, the European colonies in the Americas became independent one after another.

- In 1823, the United States announced the 'Monroe Doctrine'. It demanded that the Americas should no longer be regarded as targets of colonization.
- European countries therefore sought to build new colonies in Asia and Africa after losing their colonies in the Americas.

(iii) <u>Supremacy of European countries</u>

- After the Industrial Revolution, European countries' technological and military strength increased significantly.
- In the 18th and 19th centuries, traditional Asian powers such as China and India began to decline, while the Southeast Asian and African countries were weak.
- Difference in national power aroused European countries' ambitions to expand into Asia and Africa.

(b) Main reasons

(i) <u>Economic aspect</u>

- **Strong demands for resources and markets**
- The Industrial Revolution drove European countries to find raw materials, markets and investment opportunities overseas.
- They expanded colonial rule to develop and consolidate their economic interests.

- **Huge population and resources in Asia and Africa**
- There were cheap labour and raw materials in Asia and Africa.
- Cotton in India was a source of raw material for the British textile industry.
- In Africa, copper and diamonds were discovered in the mid-19th century. This fuelled European ambitions to scramble for Africa.

(ii) <u>Political aspect</u>

- **Limited room for expansion in Europe**
- Following the nationalist revolutions in the first half of the 19th century, Germany and Italy were unified in the 1870s. The map of Europe largely took shape. The land for expansion in Europe was limited.
 - Therefore, European countries expanded abroad.
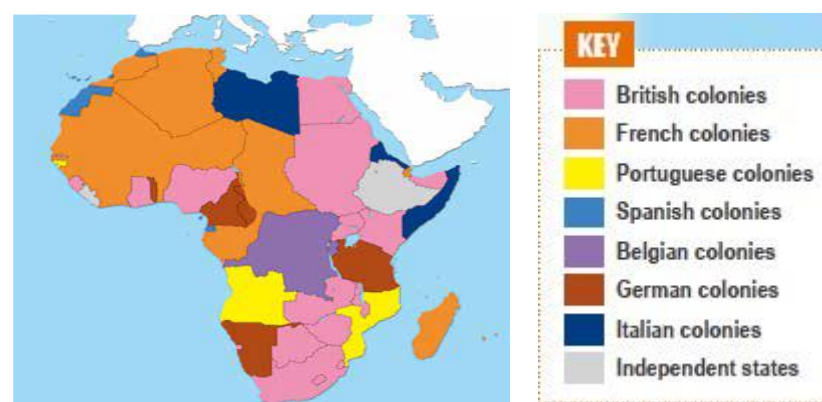
■ **Rise and development of nationalism**

• Nationalism arose in Europe in the early 19th century and first advocated national independence.

• Later, it advocated gaining national wealth and glory by overpowering other peoples.

- This idea urged European countries to speed up aggression against other peoples. They carried out colonial expansion to gain national glory and enhance international influence.

(iii) <u>Social and cultural aspects</u>

• In the 19th century, idea of the 'white man's burden' became popular in Europe.

• Europeans (white people) believed that it was their duty to educate the inferior Asians and Africans (non-white people).

• Some missionaries supported overseas expansion in order to spread Christianity to Asia and Africa.
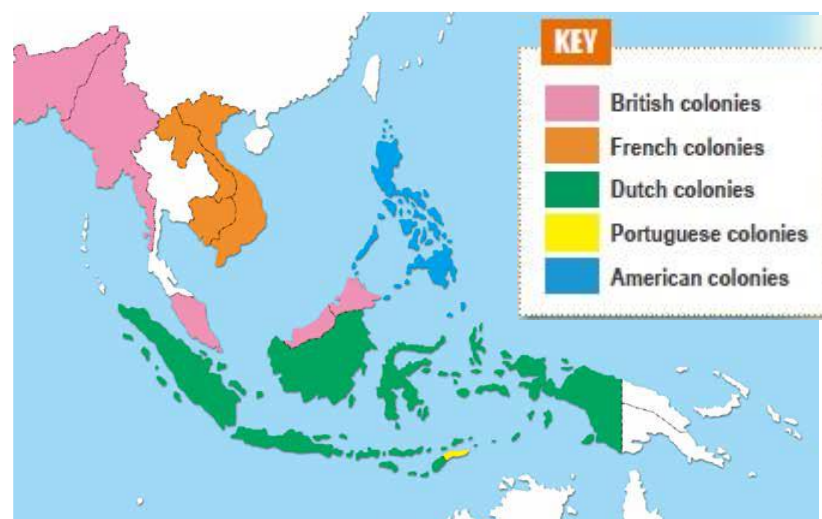
Western colonial expansion in Southeast Asia in the early 20th century

European colonial expansion in Africa in the early 20th century

C.   **The making of European colonial policy and the impact of colonial expansion**

1.   **The making of European colonial policy**

(a) Formation of colonial policy in early expansion period

- From the early 16th to the late 18th centuries, European countries expanded to increase wealth.
- Early colonial expansion focused mainly on trade and resources. Territorial expansion and political control were less important.
  - At the time, European countries set up colonies in the Americas. However, in Asia and Africa, they mainly built coastal footholds to trade and exploit local resources.

(b) Change of colonial policy in later expansion period

- With rising nationalism and national power in the late 19th century, European powers had greater territorial and political ambitions besides acquiring markets and resources.
- European powers became more concerned with extending their rule overseas.
  - Therefore, they actively established spheres of influence, protectorates and colonies in Asia and Africa.

Changes of European colonial policy from early expansion period to later expansion period

"Resources and markets are what matter. Overseas territories are of secondary importance ..."

"Resources, markets, overseas territories and national glory are all important!"

2.   Ways of European colonial expansion

(a) Political expansion

(i)   Establishing footholds
- During the early expansion period: Europeans set up coastal footholds in the Americas, Asia and Africa to obtain supplies and trade.
  - Examples include Goa in India and Ceuta in Africa.
- Later, they used these footholds as bases to expand inland.
- European countries also set up chartered companies. These companies enjoyed a trade monopoly in specific footholds or regions and administered the occupied areas.
  - For example, the governor-generals of the British East India Company and the Dutch East India Company were allowed to administer India and Indonesia respectively.

(ii)   Establishing spheres of influence
- Spheres of influence: They were zones controlled by European colonial powers with special rights.
- European countries set up spheres of influence when they faced keen competition and could not establish sole control in a particular country or region.
- European colonial powers enjoyed exclusive rights to trade, and build factories and railways in their spheres of influence.
- In the late 19th century, countries such as Britain, France, Germany and Russia set up their spheres of influence in China.

(iii) Establishing protectorates
- Protectorates: They were countries or regions protected by European colonial powers.
- European colonial powers forced other countries to sign treaties under the pretext of 'protection' to form a suzerain-protectorate relationship.
- The suzerains ruled their protectorates through local rulers. This could lower administrative costs and reduce people's resistance.
- These rulers must follow the orders of the suzerains.
- The Mosquito Coast in the Americas, Somaliland in Africa and the Maldives in Asia were British protectorates.

(iv) <u>Establishing colonies</u>
- Colonies: They belonged and had lost their sovereignty to their suzerains.
- European colonial powers set up new governments in their colonies to replace existing local governments. They appointed colonial officials (such as governors) to rule directly.
  - Famous example: Vietnam

Footholds
- **Introduction**: coastal bases for European countries to expand to the interior
- **Sovereignty**: belonged to local rulers who allowed Europeans to get supplies and trade
- **Examples**: Goa (India), Ceuta (Africa)

Spheres of influence
- **Introduction**: zones with special rights set up by European countries when they could not solely control a particular country or region
- **Sovereignty**: belonged to local rulers who were forced to grant special rights to European countries within the spheres of influence
- **Example**: China (Asia)

Protectorates
- **Introduction**: countries or regions protected by European countries
- **Sovereignty**: belonged to local rulers who had lost their power
- **Examples**: The Mosquito Coast (the Americas), Somaliland (Africa) and the Maldives (Asia)

Colonies
- **Introduction**: overseas territories of European countries
- **Sovereignty**: belonged to European suzerains which replaced the existing governments and appointed colonial officials to rule directly
- **Example**: Vietnam (Asia)

(b) Economic expansion

(i)   Exploitation of resources

■   **Natural resources**
•   European countries plundered the natural resources of their occupied territories.
     These resources were used as raw materials or were exported.
     - Britain mined gold and diamonds in South Africa;
     - Spain exploited silver and other minerals in Mexico.

■   **Land resources**
•   European countries built plantations in their occupied territories.
•   They forced local people to grow single cash crops such as spices and tobacco.
     These products were then sold to the suzerains at low prices.
     - Ceylon (present-day Sri Lanka) in Asia was forced to grow tea leaves;
     - Central and South America mainly grew sugar cane and cocoa beans.

■   **Human resources**
•   European countries captured many American Indians
     and imported African slaves to work for their
     plantations in the Americas. The Atlantic slave trade
     began.
•   Between the 16th and 19th centuries, more than 15
     million Africans were sold to the Americas as slaves.
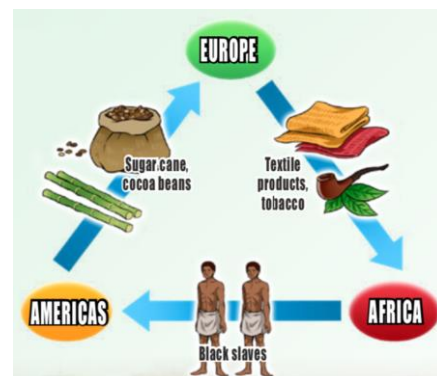
(ii)   Control over colonial markets

•   European countries adopted a policy of trade monopoly.
     - Colonies were not allowed to trade directly with other countries or colonies, or
        to produce similar products exported by their suzerains.
     - This policy protected the trading interests of the suzerains without being
        threatened by the colonies.
•   In addition, after the start of the Industrial Revolution, European countries
     obtained cheap raw materials from their colonies, and sold their expensive
     surplus industrial products back to colonies.
•   Some countries even set up factories in the colonies, using local cheap labour to
     make and sell products directly.

(b) Social and cultural expansion

- The desire to spread religion and the idea of the 'white man's burden' encouraged European countries to spread their religion and culture overseas.
- Measures included:
  - Building many Christian churches and spreading Christianity;
  - Making European languages such as English, French and Spanish the local official languages;
  - Making European languages the medium of instruction in schools, and introducing modern Western subjects such as chemistry and geography;
  - Hiring Western-educated local people as civil servants, thus more people were attracted to receive Western education.

3. **Impact of European colonial expansion**

(a) Impact on Europe

(i) Forming a European-centred world economic system

- European countries set up huge colonial empires in the Americas, Asia and Africa to get cheap local resources. They then exported industrial products at high prices, and thus successfully promoted their own economic development.
- In the meantime, the development of international trade also tended to satisfy their interests. A European-centred world economic system was formed in the early 20th century.

(ii) Causing colonial disputes and conflicts

- The competition for colonies and trade among European countries caused disputes.
- In the late 19th and early 20th centuries, the scramble for colonies in Africa and Asia led to a series of conflicts among the powers.
  - The international situation grew tense.

(b) Impact on the Americas, Asia and Africa

(i) Political aspect

■ **Modernization**

- Some countries carried out reforms in response to European colonial expansion.
  - For example, China, Japan and Siam (later Thailand) introduced political, economic and diplomatic reforms to promote national modernization in the late 19th century.
  - Among them, Japan became a world power after a series of successful reforms.
- European countries introduced Western modern administrative systems in their colonies and improved local governance.
  - The introduction of Western parliamentary and judicial systems helped establish the spirit of the rule of law.
  - Some colonies such as Malaysia kept the colonial administrative and judicial systems after independence from colonial rule.

■ **Discrimination and oppression**

- Colonial rule was characterized by racial discrimination and colonized people faced unfair political treatment.
  - European colonists enjoyed many special rights. They had great political power and were appointed as major officials;
  - Local people did not share real power and could only become junior officials.
  - France, Portugal and the Netherlands even introduced high-handed policies, which suppressed the colonized people by force.

(ii) Economic aspect

■ **Infrastructure improvement**

- To facilitate transportation, European countries improved the transport systems in their colonies by building roads, railways and piers.
  - For example, owing to the railways built by the British, present-day India has the fourth largest railway network in the world.
- Many economic activities also developed around these infrastructures.

■ **Economic exploitation**

- Europeans plundered the natural resources of the colonies and monopolized plantations, mines, oil wells, etc.
- Slave trade greatly reduced the workforce in Africa, making the economic development of Africa lag behind other regions.

- Colonial rulers mainly developed agriculture and mining, and ignored industry in their colonies. This hindered the colonies' long-term economic development.

■ **Destruction of traditional economy**

- European suzerains built large plantations and forced their colonies to grow cash crops such as rubber and pepper.
- They also sold their surplus industrial goods to the colonies, leading to the decline of local traditional handicraft industries.
  - These measures destroyed the traditional self-sufficient economy of the colonies. They also greatly reduced the size of farmlands for growing food, causing many famines in the colonies.

Continents	Colonies (names of present-day countries)	Main cash crops
Americas	Brazil	Coffee bean
	Cuba	Sugar cane
Asia	Malaysia	Rubber
	Indonesia	Spices
Africa	Ghana	Cocoa bean
	Senegal	Peanut

(iii) Social and cultural aspects

■ **Improvements in education and living standards**

- European colonial rulers and missionaries introduced modern education, Western ideas, science and technology to their colonies. This broadened the horizons of the colonized people.
- Some European countries built hospitals and introduced telegraph systems which improved the living conditions of the colonized people.

■ **Problems of plagues and slavery**

- Infectious diseases such as smallpox and measles brought by European colonists led to serious plagues in the Americas. American Indians died in huge numbers from infections and many tribes went extinct.
- Besides, Europeans started the Atlantic slave trade. Numerous African slaves were killed during trafficking and work.

■ **Changes in population structure**

- European expansion changed the ethnic composition of population in different regions.

- In the Americas:
  - American Indians were nearly extinct due to migration and wars;
  - European colonists became the majority of population;
  - Africans sold to the Americas also became a new major ethnic group in the region.

- In Asia:
  - Colonial rulers imported Chinese and Indians to Southeast Asia as workers, multi-ethnic societies were formed;
  - Some Chinese and Indians married Southeast Asian natives. New ethnic groups emerged.

*History extended: East Asia during European colonial expansion: China

◇ **Background: China in the early 19th century**

- In 1644, the Manchus set up the Qing Dynasty in China.
- China's economy was self-sufficient. The Qing Dynasty, therefore, did not value foreign trade.
- In 1757, the Qing Dynasty imposed more foreign trade regulations. It only opened Guangzhou to foreign trade.
- Foreign merchants were unhappy with the trade regulations.
- Western demand for Chinese goods such as tea, silk and porcelain was great. However, China demanded few foreign goods. Western countries faced an increasing trade imbalance.
- European countries were unhappy and wanted to change this situation. A conflict between China and the West over trade was about to happen.

◇ **China's first response: starting military resistance**

■ **Westerners exported opium to China**
- Western countries including Britain exported large amounts of opium to China.
  - They wanted to remedy their trade imbalance with China.
- In 1839, the Qing government had banned opium trade and ordered to destroy all the opium stocks.
- Britain believed that the act harmed its interests. A war between China and Britain was about to break out.

■ **Results of two foreign wars**
- 1840: The First Opium War (1840-1842) broke out.
  - The Qing government was defeated and was forced to sign the *Treaty of Nanjing* (1842).
- 1856: Britain and France attacked China again. The Second Opium War (1856-1860) broke out.
  - The Qing Dynasty lost the war and was forced to sign the *Treaty of Tianjin* (1858) and the *Convention of Beijing* (1860).

- By the 1860s, China had been defeated in two foreign wars and was forced to sign several unequal treaties. This showed that China's policy of military resistance could not stop Western expansion.

A summary of the treaties signed after the Opium Wars

	First Opium War	**Second Opium War**	
Treaty signed (year)	*Treaty of Nanjing* (1842)*	*Treaty of Tianjin* (1858)	*Convention of Beijing* (1860)
Territory ceded	Hong Kong Island	/	Kowloon Peninsula
Indemnity paid	21 million silver dollars	Britain: 4 million taels of silver France: 2 million taels of silver	Indemnities paid to Britain and France in the *Treaty of Tianjin* both increased to 8 million taels of silver
Number of new ports opened	5	10	1
Important rights granted	The tariff would be fixed by the Chinese and British government	Rights of inland navigation; allowed foreign diplomats to live in Beijing	Allowed missionaries to buy land and houses in China

*The *Treaty of Humen*（虎門條約）signed in 1843 was supplementary to the *Treaty of Nanjing*. It granted extraterritoriality (治外法權, British criminals in China being tried by British laws only) and most-favoured-nation treatment (最惠國待遇, Britain enjoyed any and all special rights that China granted to other countries).

✧ **China's second response: carrying out reforms to strengthen itself**

◼ **Self-Strengthening Movement**
- After China's repeated defeat in wars, the Qing government carried out Western-style reforms. The Self-Strengthening Movement (1861-1895) was the first attempt.

■ **Hundred Days' Reform**

• China was defeated in the Sino-Japanese War (1894-1895).

   - This showed that China remained weak and the Self-Strengthening Movement had failed.

• Foreign powers turned China into their spheres of influence. Faced with the danger of being partitioned, the Qing government started the Hundred Days' Reform (1898) to save China.

■ **Late Qing Reform**

• The Hundred Days' Reform failed after about a hundred days.

• In 1900, Western countries including Britain, Germany and France started the Eight-Power Allied Expedition. China was defeated and forced to sign the *Boxer Protocol* (1901).

• The Qing government started the Late Qing Reform (1901-1911) to save the dynasty.

A summary of the three reform movements of China in the 19th century

	Self-Strengthening Movement	**Hundred Days' Reform**	**Late Qing Reform**
Period	**1861-1895***	**1898**	**1901-1911**
Features	Mainly military and economic reforms	Mainly military and education reforms	Mainly political and education reforms
Main measures	• built arsenals and set up a new navy • developed trade and industry • built railways and telegraph systems • sent students to study abroad	• dismissed idle officials, simplified government structure • set up a modern army and navy • reformed the education system and set up modern schools • encouraged agricultural, industrial and commercial developments	• started constitutional reforms, introduced local elections and prepared to introduce constitutional rule • reformed the education system; abolished the civil service examinations • introduced Western military training

*It is generally understood that China's defeat in the Sino-Japanese War marked the failure of the Self-Strengthening Movement. However, some scholars believe that the Self-Strengthening Movement did not end in 1895 as some policies and initiatives, such as Zongli Yamen (總理衙門), were still effective after 1895.

✧ **China's third response: starting a revolution to save the country**

- The reforms of the Qing government laid the foundation for China's modernization. However, they failed to cope with domestic problems and foreign aggression.
- Some Chinese advocated saving the country through radical means.
- In 1911, a revolution broke out and spread throughout the country.
- In 1912, the Republic of China was founded. Sun Yixian became the Provisional President; later, the Qing emperor abdicated.
- However, the new republican government was also incapable of stopping foreign aggression towards China in the early half of the 20th century.

*History extended: East Asia during European colonial expansion: Japan

✧ **Background: Japan in the early 19th century**

- After 1603: the Tokugawa Shogun and his government (called the shogunate or bakufu) ruled Japan. Japan was a feudal country, but the emperor was the ruler only in name.
- 1637: the Tokugawa Shogun introduced a policy of seclusion (called sakoku).
  - Only a few Dutch, Korean and Chinese merchants were allowed to live and trade in Nagasaki;
  - However, they could not contact the Japanese population freely;
  - This situation lasted until the early 19th century.

✧ **Japan's first response: opening its doors peacefully**

■ **The coming of Perry**
- In 1853, American Commodore Perry arrived in Japan with four warships, and demanded Japan open its ports to foreign trade. He threatened to return with more ships the following year.

■ **The signing of the *Treaty of Kanagawa***
- In 1854, Perry led a bigger fleet to Japan.
- After witnessing the defeat of China earlier, the Shogunate decided to avoid war.
  - The Shogunate signed the *Treaty of Kanagawa* with the United States. Japan agreed to open two trading ports.

■ **The signing of the *Ansei Treaties***
- In 1858, the Shogunate signed the *Ansei Treaties* with the United States, Britain, France, Russia and the Netherlands. Japan gave up some sovereign rights in exchange for peace. The policy of seclusion of the Shogunate came to an end.

✧ **Japan's second response: carrying out reforms to strengthen itself**

- The incapability of the Shogunate provoked civil wars in Japan.
- 1868: The Shogunate was overthrown. Emperor Meiji was restored as head of Japan. This event was known as the Meiji Restoration.

- The new Meiji government carried out the Meiji Modernization (1868-1912).
  - It introduced modern reforms in various aspects.

- **Political modernization**: abolished the feudal system to centralize authority; introduced constitutional monarchy.
- **Economic modernization:** reformed the currency; introduced Western technology and supported private capitalists to promote industrial and commercial development; improved transportation and communication.
- **Education modernization**: introduced compulsory education; introduced modern subjects such as science and geography; sent students to study abroad.
- **Military modernization**: introduced conscription; modelled Japan's armed forces after the British navy and German army.
- **Judicial modernization**: set up the Ministry of Justice; introduced new criminal, civil and commercial codes.

✧ **Japan's third response: became a colonial power**

- The Meiji Modernization strengthened Japan greatly.
- It defeated China in the Sino-Japanese War (1894-1895) and then defeated Russia in the Russo-Japanese War (1904-1905). It was the first Asian country to defeat a European power in modern history.
- In the early 20th century, Japan successfully resisted Western aggression.
  - It ended the unequal treaties with the powers and formed an alliance with Britain.
- Later, it even expanded in East Asia and became one of the colonial powers.
  - It annexed Taiwan, the Pescadores and Korea.

✧   **Summary: Comparison of China and Japan's responses to Western expansion**

	China	Japan
Similarities	- Both countries allowed only limited foreign trade and contact in the early 19th century. - Both countries were forced to open their doors in the mid-19th century. - Both countries were forced to sign unequal treaties with Western powers. - Afterwards, both countries carried out Western-style reforms to strengthen themselves.	
Differences		
Course of opening up	China was forced to open its doors after losing the Opium Wars.	Japan opened to foreign trade peacefully. Japan accepted foreign demands to open its doors to avoid war.
Content of unequal treaties	- The treaties, signed after China's defeats in wars, were very harsh. - China had to cede land, pay heavy indemnities, and lost some sovereign rights.	- The treaties were signed without wars. - Japan did not have to cede land and pay indemnities, but lost some sovereign rights.
Results of the reform movements	- The reform movements failed to strengthen China. In the early 20th century, China faced the danger of being partitioned. - The 1911 Revolution set up the Republic of China and overthrew the Qing Dynasty. Foreign powers continued to enjoy their special rights and territorial concessions.	- The Meiji Reforms changed Japan into a strong modern power. Japan was able to maintain its independence. It even had colonies in East Asia after winning foreign wars. - By the early 20th century, Japan was able to gain equality with the West. It ended the unequal treaties and formed an alliance with Britain.
Conclusion	**China did not respond to Western expansion as successfully as Japan.** **In the early 20th century, China remained weak while Japan became a world power and even became aggressive towards China.**	

REVISION TIMELINE

Time	Important event	Extended point
1488	Diaz sailed to the Cape of Good Hope, Africa	◆ This proved that the Atlantic and Indian Ocean were connected ◆ This also led to further voyages exploring the new trade route to India
1492	Columbus reached the West Indies and discovered the Americas	◆ The Spanish discovered the Americas which hitherto unknown to Europeans
1497	Da Gama sail around the Cape of Good Hope and reached Calicut, India	◆ He opened up a new sea route from Western Europe to India
1498	Magellan led a Spanish fleet and sailed westwards	◆ Magellan became the first navigator to enter the Pacific Ocean through the Atlantic Ocean
16th century	European countries started the early colonial expansion	
1522		◆ Magellan's fleet completed the first circumnavigation of the Earth
1526	The Atlantic slave trade began	
1588	Spanish Armada was defeated by Britain	◆ Spain's naval supremacy was replaced by England.
1600	British East India Company was established	◆ Britain built and administered overseas colonies through the chartered company, and obtained great military power
1754	Britain and France fought for control over the colonies in North America	◆ This became the Seven Years' War
1756	Seven Years' War began	
1823	The United States announced the Monroe Doctrine	◆ It demanded that the Americas should no longer be regarded as targets of colonization ◆ European countries therefore sought to build new colonies in Asia and Africa after losing their colonies in the Americas
1870s	Germany and Italy were unified	◆ The map of Europe had largely taken shape, and the demand for land was further intensified ◆ European countries expanded abroad
1874	British East India Company disbanded	
Late-19th century	European countries started the late colonial expansion	
1884	European countries held the Berlin Conference	◆ European countries reached a consensus on the occupation of Africa
1885	Britain annexed Burma	◆ This made the local situation tense
1905	France and Germany competed for Morocco and caused conflicts	◆ The two countries' relations worsened

VOCABULARY LIST

Reasons for European colonial expansion

1. **Voyages of Discovery (15th – 16th centuries)**
-   It was a series of voyages initiated by voyagers. After more than a century, they discovered new routes to Asia and Africa, and discovered the Americas.

2. **Mercantilism**
-   An economic theory stressing the accumulation of wealth, began to rise in Europe in the 16th century. It reached its climax in the 17th and 18th centuries. Under its influence, European countries sped up overseas expansion to develop trade and exploit local resources.

3. **Monroe Doctrine (1823)**
-   It was announced by the United States, demanding that the Americas should no longer be regarded as targets of colonization. European countries therefore sought to build new colonies in Asia and Africa after losing their colonies in the Americas.

4. **Ideas of the 'white man's burden'**
-   In the 19th century, idea of the 'white man's burden' became popular in Europe. Europeans (white people) believed that it was their duty to educate the inferior Asians and Africans (non-white people) and accelerate local development.

Ways and impacts of European colonial expansion

1. **Footholds**
-   Europeans set up coastal footholds in the Americas, Asia and Africa for getting supplies and trade. Later, they used these footholds as bases to expand inland.

2. **Chartered companies**
-   European countries also set up chartered companies. These companies enjoyed a trade monopoly in specific footholds or regions and administered the occupied areas. One example was the British East India Company.

3. Spheres of influence

- Spheres of influence were zones controlled by European colonial powers with special rights.

- European countries set up spheres of influence when they faced keen competition and could not establish sole control in a particular country or region.

4. Protectorates

- Protectorates were countries or regions protected by European colonial powers.

- European colonial powers forced other countries to sign treaties under the pretext of 'protection' to form a suzerain-protectorate relationship.

5. Colonies

- Colonies lost their sovereignty and belonged to their suzerains.

- European colonial powers set up new governments in their colonies to replace the existing local governments. They appointed colonial officials (such as governors) to rule directly.

HUNTING FOR HISTORICAL FIGURES

1.   Diaz (1451-1500)

Portuguese navigator Diaz led his fleet south to the Cape of Good Hope in the Southern region of Africa. He passed the West coast of Africa on his way.

2.   Da Gama (1460-1524)

Portuguese navigator da Gama rounded the Cape of Good Hope and sailed North, reaching Calicut, India in 1498. His journey opened up a new sea route from Western Europe to India.

3.   Columbus (1450-1506)

In 1492, Italian navigator Columbus led a Spanish fleet and sailed westwards. He reached the present- day West Indies, which includes the Bahamas and Cuba.

4.   Magellan (1480-1521)

Portuguese navigator Magellan was the first navigator to enter the Pacific Ocean by sailing through the Atlantic. He was killed by Filipino aboriginals when he reached the Philippines in Asia. His fleet returned to Spain and completed first global circumnavigation.

EXAMINATION TIPS

✦ **Reasons for European colonial expansion: Background of and reasons for the early expansion**

Time span and target regions	■ **Time span:** the early 16th to the late 18th centuries ■ **Target regions:** Asia, Africa and the Americas
Background	■ **Discovery of new sea routes and new lands** - The **Voyages of Discovery** between the 15th and 16th centuries made great achievements - Europeans successfully opened up **new sea routes** to **Asia** and **Africa**. They also discovered **the Americas**. - They built **coastal footholds** in the Americas, Asia and Africa, laying the foundations for future expansion.
Main reasons	■ **Political aspect** - Strong European kings wanted to expand into Asia and Africa to increase their territories and economic power. This could **enhance** their **prestige**. ------ ■ **Economic aspect** - Under the influence of **Mercantilism**, European countries sped up overseas expansion to develop trade and exploit local resources. ------ ■ **Social and cultural aspects** - **Spreading Christianity** - Some Europeans supported exploring new lands in pursuit of **religious freedom**.

✶ **Reasons for European colonial expansion: Background of and reasons for the later expansion**

Time span and target regions	■ **Time span**: the late 19th to early 20th centuries ■ **Target regions:** Asia and Africa
Background	■ **Ambition enhanced by early colonial expansion** - Economic exploitation created **wealth**, and thus Europeans countries became more ambitious to expand overseas. - Existing **footholds** became the bases for expanding colonial rule. ■ **Independence of colonies in the Americas** - In the 18th and 19th centuries, colonies in the Americas became independent from colonial rule. - European countries sought to build new colonies in Asia and Africa. ■ **Supremacy of European countries** - After the **Industrial Revolution**, European countries' technological and military strength increased significantly. - Traditional Asian powers such as China and India began to decline, while Southeast Asian and African countries were weak. - Difference in national power aroused European countries' ambitions to expand into Asia and Africa.
Main reasons	■ **Economic aspect** - Strong demands for resources and markets: European countries sought **raw materials and overseas markets for selling industrial goods** - **Huge population** and **resources** in Asia and Africa ■ **Political aspect** - **Limited room for expansion** in Europe: The map of Europe largely took shape. The land for expansion in Europe was limited. - Rise and development of **nationalism** ➢ Nationalism changed and later advocated national prosperity by **overpowering other peoples**. ➢ This idea urged European countries to **speed up aggression against other peoples**. They carried out colonial expansion to **gain national glory** and **enhance international influence**. ■ **Social and cultural aspects** - Ideas of the **'white man's burden'**: Europeans (white people) believed that it was their duty to educate the inferior Asians and Africans (non-white people). - Some missionaries supported overseas expansion in order to spread **Christianity** to Asia and Africa.

✶ **The making of European colonial policy and its impact of colonial expansion**

The making of European colonial policy	■ **Formation of colonial policy in early expansion period**
	- Early colonial expansion focused mainly on trade and resources. Territorial expansion and political control were less important.
	- European countries set up colonies in the Americas. However, in Asia and Africa, they mainly built coastal footholds to trade and exploit local resources
	■ **Change of colonial policy in later expansion period**
	- European powers became more concerned with extending their rule overseas
	- They actively established spheres of influences, protectorates and colonies in Asia and Africa
Political expansion	■ **Establishing footholds**
	- **Introduction**: coastal bases for European countries to expand to the interior
	- **Sovereignty**: belonged to local rulers who allowed Europeans to get supplies and trade
	- **Examples**: Goa (India), Ceuta (Africa)
	■ **Spheres of influence**
	- **Introduction**: zones with special rights set up by European countries which could not solely control a particular country or region
	- **Sovereignty**: belonged to local rulers who were forced to grant special rights to European countries within the spheres of influence
	- **Example**: China (Asia)
	■ **Protectorates**
	- **Introduction**: countries or regions protected by European countries
	- **Sovereignty**: belonged to local rulers who had lost their power
	- **Examples**: the Mosquito Coast (the Americas), Somaliland (Africa) and the Maldives (Asia)
	■ **Colonies**
	- **Introduction**: overseas territories of European countries
	- **Sovereignty**: belonged to European suzerains which replaced the existing governments and appointed colonial officials to rule directly
	- **Example**: Vietnam (Asia)

Economic expansion	■ **Exploitation of resources** - Natural resources (raw materials and minerals), land resources (building plantations) and human resources (slave trade) - Control over colonial markets ➢ **Trade monopoly**: Colonies were not allowed to trade directly with other countries or colonies, or to produce similar products exported by their suzerains ➢ European countries acquired cheap raw materials from their colonies, and at the same time sold expensive surplus industrial products to them. ➢ Some countries even **set up factories** in the colonies, using cheap labour to make and sell products directly.
Social and cultural expansion	■ Building many Christian churches and spreading Christianity; ■ Making European languages such as English, French and Spanish the local official languages; ■ Making European languages the medium of instruction in schools. Modern Western subjects such as chemistry and geography were introduced; ■ Hiring Western-educated local people as civil servants, thus more people were attracted to receive Western education.

✷　**Impact of European colonial expansion**

Impact on Europe	■ **Forming a European-centred world economic system** - European countries acquired cheap local resources from their colonies, then exported industrial products at high prices, and thus successfully **promoted their own economic development**. - A European-centred world economic system was formed in the early 20th century. --- ■ **Causing colonial disputes and conflicts** - In the late 19th and early 20th centuries, the scramble for colonies in Africa and Asia intensified. - This led to a series of conflicts among the powers. The international situation grew tense.
Impact on the Americas, Asia and Africa	**Political aspect**
	■ **Modernization** - Some countries **carried out reforms** in response to European colonial expansion ✧ Examples: China, Japan and Siam (later Thailand) - European countries introduced **Western modern systems** in their colonies and improved local governance. The introduction of **Western parliamentary and judicial systems** helped establish the spirit of the rule of law ✧ Example: Malaysia kept the colonial administrative and judicial systems after independence from colonial rule --- ■ **Discrimination and oppression** - Colonial rule was characterized by **racial discrimination**. Colonial people faced unfair political treatment. - France, Portugal and the Netherlands even introduced **high-handed policies**, which suppressed the colonial people by force.
	Economic aspect
	■ **Infrastructure improvement** - To facilitate transportation, European countries improved the transport systems in their colonies ✧ Owing to the railways built by the British, present-day India has the fourth largest railway network in the world.

■ **Economic exploitation**

- Europeans plundered the natural resources of the colonies and monopolized plantations, mines, oil wells, etc.

- **Slave trade greatly reduced the workforce in Africa**, making the economic development of Africa lag behind other regions

- Colonial rulers mainly developed agriculture and mining, and ignored industry in their colonies. This **hindered** the colonies' **long-term economic development**

■ **Destruction of traditional economy**

- European suzerains built large **plantations** and forced their colonies to grow **cash crops** such as rubber and pepper

- They also sold their surplus industrial goods to the colonies, leading to the **decline of local traditional handicraft industries**

- These measures destroyed the traditional **self-sufficient** economy of the colonies

- They also greatly reduced the size of farmlands for growing food, causing many famines in the colonies

Social and cultural aspects

■ **Improvements in education and living standards**

- European colonial rulers and missionaries introduced **modern education**, Western ideas, science and technology to their colonies

✧ This broadened the horizons of the colonized people

- Some European countries built hospitals and introduced telegraph systems

✧ This improved the living conditions of the colonized people.

■ **Problems of plagues and slavery**

- Infectious diseases such as smallpox and measles brought by European colonists led to **serious plagues** in the Americas

✧ American Indians died in huge numbers from infections

- Europeans started the Atlantic slave trade

✧ Numerous African slaves were killed during trafficking and work

■ **Changes in population structure**

- The Americas

✧ American Indians were nearly extinct due to migration and wars

✧ European colonists became the majority of population

✧ Africans sold to the Americas became a new major ethnic group in the region

- Asia

✧ Colonial rulers imported Chinese and Indians to Southeast Asia as workers, **multi-ethnic societies** were formed

✧ Some Chinese and Indians married Southeast Asian natives. **New ethnic groups** emerged.

? 10X10 Q&A

1. Which continent did the Europeans discover through the 'Voyages of Discovery'?
   A. Africa
   B. The Americas
   C. Asia
   D. Antarctica

2. Which of the following is <u>NOT</u> a reason why European countries carried out the early expansion?
   A. Strong rulers wished to expand their territory and economic power
   B. The influence of mercantilism
   C. To spread Christianity
   D. The influence of feudalism

3. Which country was the 'Monroe Doctrine' announced by?
   A. France
   B. Britain
   C. The United States
   D. Germany

4. Which two continents was the later expansion of European countries concentrated in?
   A. The Americas and Asia
   B. The Americas and Africa
   C. Africa and Oceania
   D. Asia and Africa

5. Which of the following is <u>NOT</u> a reason why European countries carried out the late expansion?
   A. To obtain overseas investment opportunities
   B. To look for cheap labour
   C. Prevalence ideas of 'Black man's burden'
   D. To enhance national prestige

6. Which of the following terms is <u>NOT</u> matched with the correct definition?
   A. Footholds: for getting supplies and trade
   B. Spheres of influence: sovereignty belonged to the suzerain
   C. Colonies: were ruled directly by colonial officials
   D. Protectorates: belonged to local rulers

7. European countries captured many American Indians and imported American slaves. What was the slave trade known as?
   A. The Pacific slave trade
   B. The Atlantic slave trade
   C. The Mediterranean slave trade
   D. The West Indian slave trade

8. Which of the following was <u>NOT</u> a social and cultural way of European colonial expansion?
   A. Building many Christian churches
   B. Making European languages the medium of instruction in schools.
   C. Making European languages the local official languages
   D. Prohibiting local people from becoming civil servants

9. Which country rose to power through modern reforms in the 19th century?
   A. Japan
   B. China
   C. Siam
   D. Ceylon

10. Which of the following was <u>NOT</u> an economic impact of European colonial expansion on the Americas, Asia and Africa?
    A. Local infrastructure improvement
    B. Greatly reducing the size of farmlands for growing food
    C. Accelerating local industrial development
    D. Destroying the traditional self-sufficient economy of the colonies

ADVANCED CHALLENGE

Study the source and answer the questions that follow. *(10 marks)*

Source: An extract from a passage about the Japanese response to European colonial expansion

In the 1850s, Japan decided to peacefully open up to foreign countries after witnessing the defeat of the China in its wars with Britain and France. Although this brought humiliation to Japan, there were also opportunities for advancement. Japan gave up some of the country's sovereignty and signed trade agreements with the United States, Britain, Russia and the Netherlands. After that, the Japanese were determined in building a modernized nation that was on par with, or would even surpass Western countries…

The Japanese eventually succeeded. … From 1868 onwards, Japan began the 'Meiji Restoration', which lasted for over 40 years. Through modern reforms in various aspects, its political, economic and military powers significantly increased. … It succeeded in preventing further encroachment from foreign powers, and even defeated Russia in the Russo-Japanese War (1904-1905).

1. According to the source, why did Japan decide to peacefully open up to foreign countries in the 1850s? *(1 mark)*

2. Why did the source point out that peacefully opening up to foreign countries, 'brought humiliation to Japan, but there were also opportunities for advancement'? *(2 marks)*

3. 'European colonial expansion not only directly, but also indirectly accelerated the progress of Asia's modernization.' Explain your answer with reference to the Source, and using your own knowledge. *(7 marks)*

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3. **'European colonial expansion not only directly, but also indirectly accelerated the progress of Asia's modernization.' Explain your answer with reference to the Source, and using your own knowledge.** *(7 marks)*