CHAPTER PREVIEW

- What were the global consequences of European industrialization?
- How was massive migration an integral part of Western expansion?
- How did the New Imperialism change Western colonialism?
- How did non-Westerners respond to Western expansion?

Entangled Lives on the Imperial Frontier

Colonialism brought together Europeans, natives, and immigrants, as seen in this 1886 painting of the city of Durban in the British colony of South Africa, the site of a minor gold rush. The diversity of peoples in colonial encounters is suggested by the figures in the image, identifiable by the traditional clothes they wear. As Europeans view an exhibit of gold nuggets dug out of local mines, passing by are (from left to right) an African Zulu, a South Asian migrant laborer, a Sikh, and a Muslim. (From "The Spanish and American Illustration," 1886/Private Collection/Tarker/Bridgeman Images)

What were the global consequences of European industrialization?

The Industrial Revolution created a tremendously dynamic economic system. In the nineteenth century, that system expanded across the face of the earth. Some of this extension into non-Western areas was peaceful and beneficial, for the West had many products and techniques the rest of the world desired. If peaceful methods failed, however, Europeans used their superior military power to force non-Western nations to open their doors to Western economic interests. In general, Europeans fashioned the global economic system so that the largest share of the ever-increasing gains from trade, technology, and migration flowed to the West and its propertied classes.

The Rise of Global Inequality

The Industrial Revolution in Europe marked a momentous turning point. Those regions that industrialized, mainly Europe and North America, increased their wealth and power enormously in comparison to those that did not. A gap between the core industrializing regions and the soon-to-be colonized or semi-colonized regions outside the European–North American core (Africa, Asia, the Middle East, and Latin America) emerged and widened throughout the nineteenth century. Moreover, this pattern of uneven global development became institutionalized, or built into the structure of the world economy. Thus a "lopsided world" evolved, a world with a rich north and a poor south—albeit with regional variations.

In recent years economic historians have charted the long-term evolution of this gap, and Figure 24.1 summarizes the findings of one important study. Three main points stand out. First, in 1750 the average standard of living was no higher in Europe as a whole than in the rest of the world. Second, it was industrialization that opened the gaps in average wealth and well-being among countries and regions. Third, income per person stagnated in the colonized world before 1913, in striking contrast to the industrializing regions. Only after 1945, in the era of decolonization and political independence, did former colonies make real economic progress and begin the process of industrialization.

Note: Nonindustrialized countries include Africa, Asia, Latin America, and Oceania. Industrialized countries include all European countries, Canada, the United States, and Japan.

FIGURE 24.1 The Growth of Average Income per Person in Industrialized Countries, Nonindustrialized Countries, and Great Britain, 1750–1970 Growth is given in 1960 U.S. dollars and prices.

The rise of these enormous income disparities, which indicate striking disparities in food and clothing, health and education, and life expectancy and general material well-being, has generated a great deal of debate. One school stresses that the West used science, technology, capitalist organization, and even its rational worldview to create massive wealth and then used that wealth and power to its advantage. Another school argues that the West used its political and economic power to steal much of the world's riches, continuing in the nineteenth and twentieth centuries the rapacious colonialism born of the era of expansion. Because these issues are complex, it is helpful to consider them in the context of world trade in the nineteenth century.

The World Market

Commerce between nations typically stimulates economic development. In the nineteenth century European development brought an enormous increase in international trade. Great Britain took the lead in cultivating export markets for its booming industrial output, as British manufacturers looked first to Europe and then around the world, seeking consumers for their growing numbers of mass-produced goods.

Take the case of cotton textile markets in Great Britain and India. By 1820 Britain was exporting 50 percent of its production. Europe bought about one-half of these exports, while India bought only 6 percent and had its own well-established textile industry with international markets. Then after continental European nations and the United States erected tariff barriers on textiles to promote domestic industry, British cotton manufacturers aggressively sought other foreign markets in non-Western areas. By 1850 India was buying 25 percent and Europe only 16 percent of a much larger volume of production. As a British colony, India could not raise tariffs to protect its ancient cotton textile industry, which collapsed, leaving thousands of Indian weavers unemployed.

TIMELINE

1840 | 1860 | 1880 | 1900 | 1920

1805–1848
Muhammad Ali modernizes Egypt

1839–1842
First Opium War; Treaty of Nanking

1853
U.S. Commodore Perry "opens" Japan for trade

1856–1860
Second Opium War

1857–1858
Britain crushes Great Rebellion in India

1867
Meiji Restoration in Japan

1869
Suez Canal opens

1880–1900
Most of Africa falls under European rule

1884–1885
Berlin Conference settles European imperial claims in Africa

1894–1895
China defeated in Sino-Japanese War

1898
United States takes over Philippines; hundred days of reform in China; Battle of Omdurman; Fashoda Incident

1899–1902
South African (Boer) War

1900–1910
High point of European immigration

1902
Conrad publishes *Heart of Darkness*; Hobson publishes *Imperialism*

1904–1905
Russo-Japanese War

1914
Panama Canal opens; outbreak of World War I

In addition to its dominance in the export market, Britain was also the world's largest importer of goods and the largest trader of agricultural products, raw materials, and manufactured goods. Under free-trade policies, open access to Britain's market stimulated the development of mines and plantations in many non-Western areas.

Improved transportation systems fostered international trade. Wherever railroads were built, they drastically reduced transportation costs, opened new economic opportunities, and called forth new skills and attitudes. European investors funded much of the railroad construction in Latin America, Asia, and Africa, where railroads typically connected seaports with resource-rich inland cities and regions, as opposed to linking and developing cities and regions within a given country. Thus railroads served Western economic interests by facilitating the inflow and sale of Western manufactured goods and the export and the development of local raw materials.

The power of steam revolutionized transportation by sea as well as by land. Steam power began to supplant sails in the late 1860s. Passenger and freight rates tumbled as ship design became more efficient and the intercontinental shipment of low-priced raw materials became feasible. The time needed to cross the Atlantic dropped from three weeks in 1870 to about ten days in 1900, and the opening of the Suez and Panama Canals (in 1869 and 1914, respectively) shortened transport time to other areas of the globe considerably. In addition, improved port facilities made loading and unloading cargo less expensive, faster, and more dependable.

The revolution in land and sea transportation encouraged European entrepreneurs to open up and exploit vast new territories. Improved transportation enabled Asia, Africa, and Latin America to ship not only familiar agricultural products—spices, tea, sugar, coffee—but also new raw materials for industry, such as jute, rubber, cotton, and coconut oil. The export of raw materials supplied by these "primary producers" to Western manufacturers boosted economic growth in Europe and North America but did little to establish independent industry in the developing world.

New communication systems directed the flow of goods across global networks. Transoceanic telegraph cables, in place by the 1880s, enabled rapid communications among the financial centers of the world. While a British tramp freighter steamed from Calcutta to New York, a broker in London could arrange by telegram for it to carry American cargo to Australia. The same communications network conveyed world commodity prices instantaneously.

As their economies grew, Europeans began to make massive foreign investments beginning in about 1840. By the outbreak of World War I, Europeans had invested more than $40 billion abroad. Great Britain, France, and Germany were the principal investing countries (Map 24.1). The great gap between rich and poor within Europe meant that the wealthy and moderately well-to-do could and did send great sums abroad in search of interest and dividends.

Most of the capital exported did not go to European colonies or protectorates in Asia and Africa. About

MAP 24.1 European Investment to 1914 Foreign investment grew rapidly after 1850, and Britain, France, and Germany were the major investing nations. As this map suggests, most European investment was not directed to the African and Asian areas seized in the New Imperialism after 1880.

three-quarters of total European investment went to other European countries, or to settler colonies—so-called **neo-Europes**, a term coined by historian Alfred Crosby to describe regions where the climate and topography resembled the European homeland, including the United States, Canada, Australia, New Zealand, Latin America, and parts of Siberia. In these relatively advanced regions, which had already attracted significant settler populations of ethnic Europeans, Europe found its most profitable opportunities for investment in construction of railroads, ports, and resource extraction of cheap food and raw materials.

Much of this investment was peaceful and mutually beneficial for lenders and borrowers. The extension of Western economic power and the construction of neo-Europes, however, were disastrous for indigenous peoples. Native Americans and Australian Aborigines especially were decimated by the diseases, liquor, and weapons of an aggressively expanding Western society.

Western Pressures on China

Europe's development of robust offshoots in sparsely populated North America, Australia, and much of Latin America absorbed huge quantities of goods, investments, and migrants. Yet Europe's economic and cultural penetration of old, densely populated civilizations was also significant. Interaction with such civilizations increased the Europeans' trade and profit, and they were prepared to use force to attain their desires. China provides a striking example of European intrusion into non-Western lands.

For centuries China had sent more goods and inventions to Europe than it had received, and such was still the case in the early nineteenth century. Trade with Europe was carefully regulated by the Chinese imperial government, ruled by the Qing (ching), or Manchu, Dynasty in the nineteenth century. Qing officials required all foreign merchants to live in the southern port of Guangzhou (Canton) and to buy and sell only to licensed Chinese merchants. Practices considered harmful to Chinese interests were strictly forbidden.

For years the little community of foreign merchants in Guangzhou had to accept this system. By the 1820s, however, the dominant merchants, the British, were flexing their muscles. Moreover, in opium—that "destructive and ensnaring vice" denounced by

Commissioner Lin Zexu Overseeing the Destruction of Opium at Guangzhou, 1839 A formidable Chinese bureaucrat known for his competence and high moral standards, Lin Zexu was sent to Guangzhou (Canton) as imperial commissioner in late 1838 to halt the illegal importation of opium by the British. He made a huge impact on the opium trade within a matter of months. As a result, British troops invaded China, and the ultimate British victory in the Opium Wars forced China to grant European merchants one-sided trade agreements. (Pictures from History/Bridgeman Images)

Chinese decrees—the British found a means to break China's self-imposed isolation. British merchants smuggled opium grown legally in British-occupied India into China, where its use and sale were illegal. Huge profits and growing addiction led to a rapid increase in sales. By 1836 the British merchants in Guangzhou were demanding the creation of an independent British colony in China and "safe and unrestricted liberty" in their Chinese trade. Spurred on by economic motives, they pressured the British government to take decisive action and enlisted the support of British manufacturers with visions of vast Chinese markets to be opened to their goods.

At the same time, the Qing government decided that the opium trade had to be stamped out. It was ruining the people and stripping the empire of its silver, which went to British merchants to pay for the drug. The government began to vigorously prosecute Chinese drug dealers. In 1839 it sent special envoy Lin Zexu to Guangzhou to deal with the crisis. Lin Zexu punished Chinese who purchased opium and seized the opium supplies of the British merchants, who then withdrew to the barren island of Hong Kong. He sent a famous letter justifying his policy to Queen Victoria in London.

The wealthy, well-connected British merchants appealed to their allies in London for support, and the British government responded. It also wanted free, unregulated trade with China, as well as the establishment of diplomatic relations on the European model, complete with ambassadors, embassies, and published treaties. Using troops from India and taking advantage of its control of the seas, Britain occupied several coastal cities and in the first of two **Opium Wars** forced China to give in to British demands. In the Treaty of Nanking in 1842, the imperial government was required to permanently cede the island of Hong Kong to Britain, pay an indemnity of $100 million, and open up four large cities to unlimited foreign trade with low tariffs.

With Britain's new power over Chinese commerce, the opium trade flourished, and Hong Kong developed

neo-Europes Settler colonies with established populations of Europeans, such as North America, Australia, New Zealand, and Latin America, where Europe found outlets for population growth and its most profitable investment opportunities in the nineteenth century.

Opium Wars Two mid-nineteenth-century conflicts between China and Great Britain over the British trade in opium, which were designed to "open" China to European free trade. In defeat, China gave European traders and missionaries increased protection and concessions.

rapidly as an Anglo-Chinese enclave. But disputes over trade between China and the Western powers continued. Finally, the second Opium War (1856–1860) culminated in the occupation of Beijing by seventeen thousand British and French troops, who burned down the emperor's summer palace. Another round of one-sided treaties gave European merchants and missionaries greater privileges and protection and forced the Chinese to accept trade and investment on unfavorable terms in several more cities. Thus did Europeans use opium addiction and military aggression to blow a hole in the wall of Chinese seclusion and open the country to foreign ideas and uneven foreign trade.

Japan and the United States

China's neighbor Japan had its own highly distinctive civilization and even less use for Westerners. European traders and missionaries first arrived in Japan, an archipelago nation slightly smaller than California, in the sixteenth century. By 1640 Japanese leaders had decided to expel all foreigners and seal off the country from all European influences in order to preserve traditional Japanese culture and society. When American and British whaling ships began to appear off Japanese coasts almost two hundred years later, the policy of exclusion was still in effect. An order of 1825 commanded Japanese officials to "drive away foreign vessels without second thought."[1]

Japan's unbending isolation seemed hostile and barbaric to the West, particularly to the United States. It complicated the practical problems of ensuring the safety of shipwrecked American sailors and the provisioning of whaling ships and China traders sailing in the eastern Pacific. It also thwarted American business leaders' hope of trade and profit. Moreover, Americans shared the self-confidence and dynamism of expanding Western society, and they felt destined to play a great role in the Pacific. To Americans it seemed the duty of the United States to force the Japanese to open their ports and behave as a "civilized" nation.

After several unsuccessful American attempts to establish commercial relations with Japan, Commodore Matthew Perry steamed into Edo (now Tokyo) Bay in 1853. Relying on **gunboat diplomacy** by threatening to attack, Perry demanded diplomatic negotiations with the emperor. Some Japanese military leaders urged resistance, but senior officials realized how defenseless their cities were against naval bombardment. Shocked and humiliated, they reluctantly signed a treaty with the United States that opened two ports and permitted trade. Over the next five years, more treaties spelled out the rights and privileges of the Western nations and their merchants in Japan. The country was "opened." What the British had done in China with two wars, the Americans had achieved in Japan with the threat of one.

■ **gunboat diplomacy** The use or threat of military force to coerce a government into economic or political agreements.

Western Intervention in Egypt

Egypt's experience illustrates not only the explosive power of the expanding European economy but also its seductive appeal for indigenous elites. Since 525 B.C.E. a succession of foreigners had ruled Egypt, most recently the Ottoman sultans. In 1798 French armies under Napoleon Bonaparte invaded the Egyptian part of the Ottoman Empire and occupied the territory for three years. Into the power vacuum left by the French withdrawal stepped an extraordinary Albanian-born, Turkish-speaking general, Muhammad Ali (1769–1849).

First appointed governor of Egypt in 1805 by the Ottoman sultan, Muhammad Ali set out to build his own state based on European models. He built a large army by drafting illiterate Egyptian peasants, and he hired French and Italian army officers to train these raw recruits and their Turkish officers in modern military methods. He reformed the government bureaucracy, cultivated new lands, and improved communication networks. By the end of his reign in 1848, Ali had established a strong and virtually independent Egyptian state, to be ruled by his family on a hereditary basis within the Ottoman Empire (see "Reform and Readjustment in the Ottoman Empire" in Chapter 23).

Europeans saw opportunities for work and profit in Ali's modernizing Egypt. By 1864 more than fifty thousand European lived in the port city of Alexandria; they worked as army officers, engineers, doctors, government officials, and police officers. Others turned to trade, finance, and shipping.

To pay for his ambitious plans, Ali encouraged the development of commercial agriculture. This move had profound implications. Egyptian peasants were poor but largely self-sufficient, growing food for their own consumption on state-owned lands allotted to them by tradition. When high-ranking officials and members of Muhammad Ali's family began carving large private landholdings out of the state domain, they forced peasants to grow cash crops such as cotton and rice geared to European markets. Egyptian landowners "modernized" agriculture, but to the detriment of peasant living standards.

These trends continued under Muhammad Ali's grandson Ismail (ihs-MAH-eel), who in 1863 began his sixteen-year rule as Egypt's khedive (kuh-DEEV), or prince. Educated at France's leading military academy, Ismail was a westernizing autocrat. The large irrigation networks he promoted boosted cotton production and exports to Europe, and with his support a French company completed the Suez Canal in 1869. The Arabic of the Egyptian masses replaced the Turkish spoken by Ottoman rulers as the official language.

Building the Suez Canal Workers dig through a clay bank during construction of the Suez Canal in Egypt. The canal, which took ten years and the labor of some 1.5 million people to build, connects the Mediterranean and Red Seas. Built by the French-owned Suez Canal Company and financed by international investors, the canal opened in 1869 and dramatically reduced shipping time between Europe and Asia. (Otto Herschan/Getty Images)

Young Egyptians educated in Europe spread new skills, and Cairo acquired modern boulevards and Western hotels. As Ismail proudly declared, "My country is no longer in Africa, we now form part of Europe."[2]

Yet Ismail's projects were enormously expensive, and by 1876 Egypt owed foreign bondholders a colossal debt that it could not pay. France and Great Britain intervened and forced Ismail to appoint French and British commissioners to oversee Egyptian finances. This decision marked a sharp break with the past. Throughout most of the nineteenth century, Europeans had used military might and political force primarily to make sure that non-Western lands would accept European trade and investment. Now Europeans were going to effectively rule Egypt.

The Suez Canal, 1869

Foreign financial control evoked a violent nationalistic reaction among Egyptian army officers, religious leaders, and young intellectuals. In 1879, under the leadership of Colonel Ahmed Arabi, they formed the Egyptian Nationalist Party. When the French and British forced Ismail to abdicate in favor of his ineffectual son, Mohamed Tewfik Pasha (r. 1879–1892), in 1882, riots broke out in Alexandria. A number of Europeans were killed, and Tewfik (TAW-fik) and his court had to flee to British ships for safety. When the British fleet bombarded Alexandria, more riots swept the country, and Colonel Arabi led a revolt. But a British expeditionary force put down the rebellion and occupied all of Egypt that year.

The British claimed their occupation was temporary, but British armies remained in Egypt until 1956. Before the First World War (1914–1918), they maintained the façade of

Egypt as an autonomous province of the Ottoman Empire; the khedive, however, was a mere puppet who mostly carried out the bidding of the British colonial authorities. British rule did result in tax reforms and somewhat better conditions for peasants, and foreign bondholders received interest on their loans. But Egyptians saw the British as foreign occupiers, and anticolonial resistance grew during and after the First World War.

The British takeover in Egypt provided a new model for European expansion in densely populated lands. Such expansion was based on military force, political domination, and a self-justifying ideology of beneficial reform. This model predominated until at least 1914. In China, Japan, and Egypt, and across the globe, Europe's Industrial Revolution and subsequent expansion contributed to fundamental political changes as well as economic growth.

How was massive migration an integral part of Western expansion?

A poignant human drama accompanied European expansion: millions of people left their ancestral lands in history's greatest migration. To ordinary people for whom the opening of China and the interest on the Egyptian debt had not the slightest significance, this great movement was the central experience in the saga of Western expansion. It was, in part, because of this **global mass migration** that the West's impact on the world in the nineteenth century was so powerful and many-sided.

The Pressure of Population

In the early eighteenth century European population growth entered its third and decisive stage, which continued unabated until the early twentieth century. Birthrates eventually declined in the nineteenth century, but so did death rates, mainly because of the rising standard of living and the revolution in public health. During the hundred years before 1900 the population of Europe (including Asiatic Russia) more than doubled, from approximately 188 to roughly 432 million.

These figures actually understate Europe's population explosion, for between 1815 and 1932 more than 60 million Europeans left the subcontinent. These emigrants went primarily to the rapidly growing neo-Europes — North and South America, Australia, New Zealand, and Siberia. Since the population of native Africans, Asians, and Americans grew more slowly than that of Europeans, the number of Europeans and people of predominantly European origin jumped from about 24 percent of the world's total in 1800 to about 38 percent on the eve of World War I.

The growth of the European population drove more and more people to emigrate. As in the eighteenth century, the rapid increase in numbers in Europe proper led to relative overpopulation in area after area. In most countries, emigration increased twenty years after a rapid growth in population, as children grew up, saw little available land and few economic opportunities, and departed. This pattern was especially prevalent when rapid population increase predated extensive industrial development, which offered the best long-term hope of creating jobs and reducing poverty. Thus millions of country folk in industrialized parts of Europe moved to cities in search of work, while those in more slowly industrializing regions moved abroad.

Three facts about this emigration stand out. First, the number of men and women who left Europe increased rapidly at the end of the nineteenth century and leading up to World War I. As Figure 24.2 shows, more than 11 million left in the first decade of the twentieth century, over five times the number departing in the 1850s. Large-scale emigration was a defining characteristic of European society at the turn of the century.

FIGURE 24.2 Emigration from Europe by Decade, 1860–1940
Emigration from Europe followed regional economic trends, as the comparison in this chart suggests. Overall, emigration from Europe grew quickly until the outbreak of World War I in 1914, after which it declined rapidly.

FIGURE 24.3 Origins and Destinations of European Emigrants, 1851–1960 European emigrants came from many countries; almost half of them went to the United States.

Second, different countries had very different patterns of migration. People left Britain and Ireland in large numbers from the 1840s on. This outflow reflected not only rural poverty but also the movement of skilled industrial technicians and the preferences shown to British migrants in the overseas British Empire. Ultimately, about one-third of all European emigrants between 1840 and 1920 came from the British Isles. German emigration was quite different. It grew irregularly after about 1830, reaching a first peak in the early 1850s and another peak in the early 1880s. Then it declined rapidly, for at that point Germany's rapid industrialization provided adequate jobs at home. This pattern contrasted sharply with that of Italy. More and more Italians left the country right up to 1914, forced out by relatively slow industrial growth and poor living standards in Italian villages. In short, migration patterns mirrored social and economic conditions in the various European countries and provinces.

Third, although the United States did absorb the largest overall number of European emigrants, fewer than half of all these emigrants went to the United States. Asiatic Russia, Canada, Argentina, Brazil, Australia, and New Zealand also attracted large numbers, as Figure 24.3 shows. Moreover, immigrants accounted for a larger proportion of the total population in Argentina, Brazil, and Canada than in the United States. The common American assumption that European emigration meant immigration to the United States is quite inaccurate.

European Emigration

What kind of people left Europe, and what were their motives? Around 1900, the European emigrant was generally an energetic small farmer or skilled artisan trying hard to stay ahead of poverty, not a desperately impoverished landless peasant or urban proletarian. Small peasant landowners and village craftsmen typically left Europe because of the lack of available land and the growing availability of inexpensive factory-made goods, which threatened their traditional livelihoods.

Immigrants brought great benefits to the countries that received them, largely because the vast majority were young, unmarried, and ready to work hard to improve their lives in the new land, at least for a time. Many Europeans moved but remained within Europe, settling temporarily or permanently in another European country. Jews from central Europe and peasants from Ireland moved to Great Britain; Russians and Poles sought work in Germany; and Spaniards, Portuguese, and Italians went to France. Many Europeans returned home after some time abroad. One in two immigrants to Argentina and probably one in three to the United States eventually returned to their native lands. Unlike the Irish or Russian Jews, these Europeans might be able to buy land and did not face persecution back at home.

The mass movement of Italians illustrates many of the characteristics of European emigration. As late as the 1880s, three of every four Italians worked in agriculture. With the influx of cheap North American wheat, many small landowning peasants whose standard of living was falling began to leave their country. Some called themselves "swallows." After harvesting their own wheat and flax in Italy, they "flew" to Argentina or Brazil to harvest wheat between December and April. Returning to Italy for the spring planting, they repeated this exhausting process. This was a very hard life, but a frugal worker could save $250 to $300 in the course of

global mass migration The mass movement of people from Europe in the nineteenth century; one reason that the West's impact on the world was so powerful and many-sided.

a season, at a time when an Italian agricultural worker earned less than $1 a day in Italy.

Ties of family and friendship played a crucial role in the emigration process. Many people from a given province or village settled together in rural enclaves or tightly knit urban neighborhoods thousands of miles away. Very often a prominent individual—a businessman, a religious leader, an ambitious family member—would blaze the way, and others would follow, forming a "migration chain."

Many landless young European men and women were spurred to leave by a spirit of revolt and independence. In Sweden, Norway, Jewish Russia, and Italy, these young people felt frustrated by the power of the small minority in the privileged classes, which often controlled both church and government and resisted demands for liberal reform and greater opportunity. For many, then, emigration was a radical way to gain basic human rights. Emigration rates slowed in countries where the people won political and social reforms, such as the right to vote, equality before the law, or social security benefits.

The Immigrant Experience in the United States

As we have seen, not all European immigrants moved to North America, but about one-half of the 60 million Europeans who left their homelands did come to the United States. Their work and lives had a major impact on Europe and the United States alike.

Between 1890 and 1925 over 20 million men, women, and children passed through the Ellis Island Immigration Station in New York City harbor. During these years, southern and eastern Europeans, such as Italians, Poles, and Russian Jews, far outnumbered the northern Europeans who had predominated in the mid-nineteenth-century wave of migration to

Migrants Crossing the Atlantic to Reach the United States Between 1800 and 1930, about 30 million Europeans left home to seek better lives in the United States, and today over 40 percent of Americans are descendants of people who went through immigration control on Ellis Island, the country's main immigration station in New York City harbor. Although advertising posters like the one pictured here promised colorful and adventurous passage to South America as well as the United States, the many people who bought tickets in the least expensive "steerage" compartment faced a crowded and uncomfortable journey. Yet poor job prospects at home, political or ethnic persecution, and the lure of the booming U.S. economy led many to take the trip. (poster: National Archives, RG85: 51411/53; steerage: Granger/Granger—All rights reserved)

the United States. Transporting migrants across the North Atlantic was big business. Well-established steamship companies such as Cunard, White Star, and Hamburg-America advertised inexpensive fares and good accommodations. The reality was usually different. For the vast majority who could afford only third-class passage in the steerage compartment, the eight- to fourteen-day journey from Naples, Hamburg, or Liverpool was cramped, cold, and unsanitary.

Once they arrived at Ellis Island, steerage passengers were subjected to a four- to five-hour examination in the Great Hall. Physicians checked their health. Customs officers inspected legal documents. Bureaucrats administered intelligence tests and evaluated the migrants' financial and moral status. The exams worried and sometimes insulted the new arrivals. As one Polish-Jewish immigrant remembered, "They asked us questions. 'How much is two and one? How much is two and two?' But the next young girl, also from our city, went and they asked her, 'How do you wash stairs, from the top or from the bottom?' She says, 'I don't come to America to wash stairs.'"[3]

Migrants with obvious illnesses were required to stay in the island's hospital as long as several weeks to see if they improved. Sick passengers whom officials judged either a threat to public health or a likely drain on public finances were sent home. Suspected anarchists and, later, Bolsheviks were also deported.

By today's standards, it was remarkably easy to move to the United States — only about 2 percent of all migrants were denied entry. After they cleared processing, the new arrivals were ferried to New York City, where they either stayed or departed for other industrialized cities of the Northeast and Midwest. The migrants typically took unskilled jobs for low wages, but by keeping labor costs down, they fueled the rapid industrialization of late-nineteenth-century America. They also transformed the United States from a land of predominantly British and northern European settlers into a vibrant multiethnic society.

Asian Emigration

Not all emigration was from Europe. Many Chinese, Japanese, Indians, and Filipinos — to name only four key groups — also responded to rural hardship with temporary or permanent emigration. At least 3 million Asians moved abroad before 1920. Most went as indentured laborers to work under difficult conditions on the plantations or in the gold mines of Latin America, southern Asia, Africa, California, Hawaii, and Australia. In a new global trend, white estate owners often used Asian immigrants to replace or supplement black workers after the suppression of the slave trade.

In the 1840s, for example, the Spanish government recruited Chinese laborers to meet the strong demand for field hands in Cuba. Between 1853 and 1873, when such immigration was stopped, more than 130,000 Chinese laborers had moved to Cuba. The majority spent their lives as virtual slaves. Peruvian plantation and mine owners likewise brought in more than 100,000 workers from China in the nineteenth century, and there were similar movements of Asians elsewhere.

Chinese Laborers in South Africa Western industrialization and imperial expansion contributed to the mass migration of peoples across the globe. In 1904, labor shortages in South Africa, in part a result of the Boer War, led to the importation of over 60,000 Chinese laborers to work in the local gold mines. This illustration from *Le Petit Journal* (August 1904) shows Chinese workers arriving on the docks near Johannesburg, where they sign work contracts offered by British colonial officials. (Chris Hellier/Getty Images)

Emigration from Asia would undoubtedly have grown much more if planters and mine owners had been able to hire as many Asian workers as they wished. But the original European settlers, disturbed by the presence of Asians who had moved beyond the fields and mines into towns, demanded a halt to Asian immigration. In 1882, the American government instituted the Chinese Exclusion Act, and Australia followed suit in 1901 with the Immigrant Restriction Act — discriminatory laws designed to keep Asians from entering the country.

Nativism in the United States

In this 1896 Senate speech, the dynamic and well-respected Republican senator Henry Cabot Lodge expressed nativist anxieties about "race mixing" in the United States and called for strict immigration restrictions. Most Europeans who immigrated to the United States in the late nineteenth century were Roman Catholics from Italy and central Europe and Jews and Slavs from Poland and Russia —"races" that nativists considered superior to Asians and Africans but far below the Anglo-Saxon Protestants from northern Europe, who constituted the majority of U.S. immigrants before the 1870s.

Restricting Immigration

This bill is intended to amend the existing law so as to restrict still further immigration to the United States. Paupers, diseased persons, convicts, and contract laborers are now excluded. By this bill it is proposed to make a new class of excluded immigrants, and to add to those which have just been named the totally ignorant. . . .

[We propose] to exclude all immigrants who could neither read nor write, and this is the plan which was adopted by the committee. . . . In their report the committee have shown by statistics, which have been collected and tabulated with great care, the emigrants who would be affected by this illiteracy test. . . . It is found . . . that the illiteracy test will bear most heavily upon the Italians, Russians, Poles, Hungarians, Greeks, and Asiatics, and very lightly, or not at all, upon English-speaking emigrants, or Germans, Scandinavians, and French. In other words, the races most affected by the illiteracy test are those whose emigration to this country has begun within the last twenty years and swelled rapidly to enormous proportions, races with which the English-speaking people have never hitherto assimilated, and who are most alien to the great body of the people of the United States. . . .

Immigration and the Economy

There is no one thing which does so much to bring about a reduction of wages and to injure the American wage earner as the unlimited introduction of cheap foreign labor through unrestricted immigration. . . .

Immigration and Citizenship

When we speak of a race, . . . we mean the moral and intellectual characters, which in their association make the soul of a race, and which represent the product of all its past, the inheritance of all its ancestors. . . .

[I]t is on the moral qualities of the English-speaking race that our history, our victories, and all our future rest. There is only one way in which you can lower those qualities or weaken those characteristics, and that is by breeding them out. If a lower race mixes with a higher in sufficient numbers, history teaches us that the lower race will prevail. . . . The lowering of a great race means not only its own decline, but that of civilization. . . .

Mr. President . . . The time has certainly come, if not to stop, at least to check, to sift, and to restrict those immigrants. . . . The gates which admit men to the United States and to citizenship in the great republic should no longer be left unguarded.

EVALUATE THE EVIDENCE

1. How does Lodge's understanding of race drive his enthusiasm for limits on immigration?
2. Why would nativist arguments win popular support in the late nineteenth century? Are such arguments still relevant in Europe and the United States today?

Source: Henry Cabot Lodge, *Speeches and Addresses, 1884–1909* (Boston: Houghton Mifflin Company, 1909), pp. 245, 247, 249–250, 262, 264–266.

In fact, the explosion of mass mobility in the late nineteenth century, combined with the growing appeal of nationalism and scientific racism (see "Nationalism and Racism" in Chapter 23), encouraged a variety of attempts to control immigration flows and seal off national borders. National governments established strict rules for granting citizenship and asylum to foreigners. Passports and custom posts were created so state governments could monitor travelers across increasingly tight national boundaries. Such attempts were often inspired by **nativism**, beliefs that led to policies giving preferential treatment to native-born inhabitants above immigrants. Thus French nativists tried to limit the influx of Italian migrant workers, German nativists stopped Poles from crossing eastern borders, and American nativists (in the 1920s) restricted immigration from southern and eastern Europe and banned it outright from much of Asia. (See "Evaluating Written Evidence: Nativism in the United States," above.)

A crucial factor in migration patterns before 1914 was, therefore, immigration policies that offered preferred status to "acceptable" racial and ethnic groups in the open lands of possible permanent settlement. This,

too, was part of Western dominance in the increasingly lopsided world. Largely successful in monopolizing the best overseas opportunities, Europeans and people of European ancestry reaped the main benefits from the mass migration. By 1913 people in Australia, Canada, and the United States had joined the British in having the highest average incomes in the world, while incomes in Asia and Africa lagged far behind.

How did the New Imperialism change Western colonialism?

The expansion of Western society reached its apex between about 1880 and 1914. In those years, the leading European nations not only continued to send massive streams of migrants, money, and manufactured goods around the world, but also rushed to create or enlarge vast empires. This political empire building, under direct European rule, contrasted sharply with economic intervention in non-Western territories between 1816 and 1880, which had, for example, "opened" China and Japan to international trade on unequal terms but left these countries politically independent. By contrast, the direct political control of the empires of the late nineteenth century recalled the old European colonial empires of the sixteenth to eighteenth centuries. Because this renewed imperial push came after a long pause in European expansionism, contemporaries called it the **New Imperialism**.

Characterized by a frantic rush to plant the flag over as many people and as much territory as possible, the New Imperialism had momentous consequences. By the early twentieth century almost 84 percent of the globe was dominated by European nations, and Britain alone controlled one-quarter of the earth's territory and one-third of its population. Aimed primarily at Africa and Asia, the New Imperialism created tensions among competing European states and led to wars and threats of war with non-European powers.

The European Presence in Africa Before 1880

Prior to 1880, European nations controlled only about 10 percent of Africa. The French had begun the conquest of Algeria in 1830, and by 1880 many French, Italian, and Spanish colonists had settled among the overwhelming Arab majority there. Yet the overall effect on Africa was minor.

At the southern tip of the continent, Britain had taken possession of the Dutch settlements in and around Cape Town during the wars with Napoleon Bonaparte. This takeover had led disgruntled Dutch cattle ranchers and farmers in 1835 to make their Great Trek into the interior, where they fought the Zulu and Xhosa (KO-sah) peoples for land. After 1853 the Boers, or **Afrikaners** (a-frih-KAH-nuhrz), as the descendants of the Dutch in the Cape Colony were beginning to call themselves, proclaimed their independence and defended it against British armies. By 1880 Afrikaner and British settlers, who detested each other and lived in separate areas, had wrested control of much of South Africa from the Zulu, Xhosa, and other African peoples.

In addition to the French in the north and the British and Afrikaners in the south, the Portuguese maintained a loose hold on their old possessions on the coast of West Africa in Angola and Mozambique. Elsewhere, over the great mass of the continent, Europeans did not rule.

The Berlin Conference and the Scramble for Africa

Between 1880 and 1900 the situation changed drastically. In a spectacular manifestation of the New Imperialism, Britain, France, Belgium, Germany, and Italy scrambled for African possessions as if their national livelihoods depended on it (Map 24.2). By 1900 nearly the whole continent had been carved up and placed under European rule: only Ethiopia, which fought off Italian invaders, and Liberia, which had been settled by freed slaves from the United States, remained independent.

In the complex story of the European seizure of Africa, certain events and individuals stand out. Of enormous importance was the British occupation of Egypt in 1882, which established a new model of formal political control. King Leopold II of Belgium (r. 1865–1909), an energetic, strong-willed monarch of a tiny country with a lust for distant territory, also played a crucial role. As early as 1861, he had laid out his vision of expansion: "The sea bathes our coast, the world lies before us. Steam and electricity have annihilated distance, and all the nonappropriated lands on the surface of the globe can become the field of our operations and of our success."[4]

nativism Policies and beliefs, often influenced by nationalism, scientific racism, and mass migration, that give preferential treatment to established inhabitants over immigrants.

New Imperialism The late-nineteenth-century drive by European countries to create vast political empires abroad.

Afrikaners Descendants of the Dutch settlers in the Cape Colony in southern Africa.

MAPPING THE PAST

MAP 24.2 The Partition of Africa

The European powers carved up Africa after 1880 and built vast political empires. European states also seized territory in Asia in the nineteenth century, although some Asian states and peoples managed to maintain their political independence (see Map 24.3). Compare the patterns of European imperialism in Africa and Asia, using this map and Map 24.3.

ANALYZING THE MAP What European countries were leading imperialist states in both Africa and Asia, and what lands did they hold? What countries in Africa and Asia maintained their independence? What did the United States and Japan have in common in Africa and Asia?

CONNECTIONS The late nineteenth century marked the high point of European imperialism. What conditions made the European rush for land and empire in Africa and Asia so successful?

By 1876 Leopold's expansionism focused on central Africa. He formed a financial syndicate under his personal control to send Henry M. Stanley, a sensation-seeking journalist and part-time explorer, to the Congo basin. Stanley established trading stations, signed unfair treaties with African chiefs, and planted the Belgian flag. Leopold's actions alarmed the French, who quickly sent out an expedition under Pierre de Brazza. In 1880 de Brazza signed a treaty of protection with the chief of the large Teke tribe and began to establish a French protectorate on the north bank of the Congo River.

By 1882 much of Europe had caught "African fever," and a gold-rush mentality threatened the balance of power in Europe. To lay down some basic rules for this new and dangerous global competition for territory in Africa, French statesman Jules Ferry, an ardent republican who also embraced imperialism, and German chancellor Otto von Bismarck arranged for the competitors to meet in Berlin in 1884 and 1885. The **Berlin Conference**, attended by over ten Western powers including the United States, established the principle that European claims to African territory had to rest on "effective occupation" (a strong presence on the ground) to be recognized by other states. The conference basically legitimized British claims in Egypt and southern Africa. With Bismarck's tacit approval, the French could now press southward from Algeria, eastward from their old forts on the Senegal coast, and northward from their protectorate on the Congo River to take control of parts of West and Central Africa.

At the conference, European statesmen also recognized King Leopold's personal rule over a supposedly neutral Congo Free State and agreed to work to stop slavery and the slave trade in Africa. In reality, conditions in Leopold's Congo Free State—a territory about the size of the United States east of the Mississippi River—exemplify some of the worst abuses perpetrated against native peoples by any European imperial power. Belgian colonial administrators sought to enrich themselves by harvesting Congo's ample supplies of elephant ivory and rubber, both in high demand in European markets. Africans in the Congo were coerced by the *Force Publique*, Leopold's private army, to labor in the jungle, where conditions were little better than slavery. The profits never materialized, and the *Force Publique* punished Congolese who resisted colonial demands or simply failed to meet the quotas for rubber collection by torturing, dismembering, and even murdering them.

As reports and photos of the atrocities—often collected by appalled white Christian missionaries—made their way back to Europe, a public scandal ensued. Widespread outrage and the determined efforts of the anticolonial Congo Reform Association (whose members included Mark Twain and Booker T. Washington) ultimately forced Leopold in 1908 to end his personal rule. The Congo Free State became a formal colony of the Belgian state, and the *Force Publique* was disbanded, but only after 5 to 10 million Africans had lost their lives to Leopold's mad pursuit of profit and power. (See "Evaluating Visual Evidence: European Imperialism at Its Worst," page 744.)

Atrocities on a Rubber Plantation in the Belgian Congo Native rubber workers display the severed hands of two of their countrymen murdered by plantation overseers in 1904. The white men are Baptist missionaries, who documented many such atrocities for publication by anti-imperialist critics in Europe. The "Congo Free State" controlled by the Belgians stands as one of the most violent and brutal examples of European imperialism. (Everett Collection Historical/Alamy)

The Berlin Conference coincided with Germany's sudden emergence as an imperial power. Before about 1880, Bismarck, like many other European leaders, had seen little value in colonies. In 1884 and 1885, as nationalist agitation for colonial expansion increased, Bismarck did an abrupt about-face. Germany established protectorates over a number of small African kingdoms and tribes in Togo, the Cameroons region, southwest Africa, and, later, East Africa. Revolts against exploitative German rule in the colonies of German Southwest Africa (present-day Namibia) and German East Africa (present-day Burundi, Rwanda, and Tanzania) led to German military intervention and full-scale warfare. In German Southwest Africa, German troops massacred some 100,000 Herero and Nama Africans. Some historians see in this example of European imperialism at its worst a prelude to Nazi genocide of European Jews in the Second World War.

The British in Africa After 1885

Meanwhile, the British began to enlarge their own African colonies, beginning at the southern tip of the African continent. Led by Cecil Rhodes (1853–1902),

■ **Berlin Conference** A meeting of European leaders held in 1884 and 1885 in order to lay down some basic rules for imperialist competition in sub-Saharan Africa.

European Imperialism at Its Worst

This 1908 English cartoon, "Leopold, King of the Congo, in his national dress," focuses on the barbaric practice of cutting off the hands and feet of Africans who failed to gather as much rubber as Leopold's company demanded. As newspaper reports and photographs of Belgian abuses — often composed by white missionaries, as in the photo on page 743 — trickled back to Europe, public outrage grew. In 1908 an international human rights campaign forced the Belgian king to cede his personal fief to the Belgian state.

(Granger/Granger — All rights reserved)

EVALUATE THE EVIDENCE

1. How does the cartoonist draw on real-life atrocities but also humor and exaggeration to maximize the impact of his message?
2. Why would European missionaries play a central role in publicizing colonial atrocities?
3. What legacies would the brutalization of native Congolese leave for Europeans, and for Africans?

prime minister of Britain's Cape Colony, British colonists leapfrogged over the two Afrikaner states — the Orange Free State and the Transvaal (see Map 24.2) — in the early 1890s and established protectorates over Bechuanaland (bech-WAH-nuh-land; now Botswana) and Rhodesia (now Zimbabwe and Zambia), named in honor of its founder. (See "Individuals in Society: Cecil Rhodes," page 745.)

English-speaking capitalists like Rhodes developed fabulously rich gold mines in the Transvaal, and this unilateral territorial and economic expansion heightened tensions between the British and Afrikaner settlers (or Boers, descendants of Dutch colonialists). In 1899 the conflict erupted in the bloody **South African War,** or **Boer War** (1899–1902). After a series of defeats at the hands of the determined Afrikaners, the British shipped some 180,000 troops to southern Africa. Overwhelming British forces put the Afrikaners on the defensive, and they responded with an intensive guerrilla war that took two years to put down. During the fighting, both sides enlisted the support of indigenous African troops. The British forces resorted to "scorched earth" policies, burning crops and villages in Afrikaner regions, and, most notoriously, forced Afrikaners and some native Africans into concentration camps in an attempt to halt the guerrilla campaign. News of these tactics provoked liberal outrage at home in Britain.

The war ended with a British victory in 1902. In 1910 the Afrikaner-Boer territories were united with the old Cape Colony and the eastern province of Natal in a new Union of South Africa, established as a largely

■ **South African (Boer) War** Conflict in 1899–1902 in which British troops defeated rebellious Afrikaners, descendants of Dutch colonialists, leading to consolidation of South African territories.

INDIVIDUALS IN SOCIETY

Cecil Rhodes

Cecil Rhodes epitomized the dynamism and the ruthlessness of the New Imperialism. He built a corporate monopoly, claimed vast tracts in Africa, and established the famous Rhodes scholarships to educate British (and American) colonial leaders who would love and strengthen the British Empire. But to Africans, he left a bitter legacy.

Rhodes came from a large middle-class family and at seventeen went to southern Africa to seek his fortune. He soon turned to diamonds, newly discovered at Kimberley, where he picked good business partners, and was wealthy by 1876. But Rhodes, often called a dreamer, wanted more. He entered Oxford University, where he studied while returning periodically to Africa. His musings crystallized in a Social Darwinist belief in progress through racial competition and territorial expansion. "I contend," he wrote, "that we [English] are the finest race in the world and the more of the world we inhabit the better it is for the human race."*

Rhodes's belief in British expansion never wavered. In 1880 he formed the De Beers Mining Company, and by 1888 his firm had monopolized southern Africa's diamond production and earned fabulous profits. Rhodes also entered the Cape Colony's legislature and became the colony's all-powerful prime minister from 1890 to 1896.

His main objective was to annex the Afrikaner republics and impose British rule on as much land as possible beyond their northern borders. Working through a state-approved private company financed in part by De Beers, Rhodes's agents forced and cajoled African kings to accept British "protection," and then put down rebellions with machine guns. Britain thus obtained a great swath of empire on the cheap.

But Rhodes, like many high achievers obsessed with power and personal aggrandizement, went too far. He encouraged, and then declined to call back, the 1896 Jameson Raid, a failed British invasion of the Afrikaner Transvaal that was designed to topple the Dutch-speaking republic. Repudiated by top British leaders who had encouraged his plan, Rhodes had to resign as prime minister. In declining health, he continued to agitate against the Afrikaner republics. He died at age forty-nine as the South African War (1899–1902) ended.

In accounting for Rhodes's remarkable but flawed achievements, both sympathetic and critical biographers stress his imposing physical size, enormous energy, and charismatic personality. His ideas were commonplace, but he believed in them passionately, and he could persuade and inspire others to follow his lead. Rhodes the idealist was nonetheless a born negotiator, a crafty deal maker who believed that everyone could be had for a price. According to his most insightful biographer, Rhodes's homosexuality — discreet, partially repressed, but undeniable — was also "a major component of his magnetism and his success."† Never comfortable with women, he loved male companionship. He drew together a "band of brothers," both gay and straight, who shared in his pursuit of power.

Cecil Rhodes riding on his estate outside Cape Town, South Africa. (Universal History Archive/Universal Images Group/Shutterstock)

Rhodes cared nothing for the rights of Africans and blacks. Both a visionary and an opportunist, he looked forward to an eventual reconciliation of Afrikaners and British in a united white front. Therefore, as prime minister of the Cape Colony, he broke with the colony's liberal tradition and supported Afrikaner demands to drastically reduce the number of black voters and limit black freedoms. This helped lay the foundation for the Union of South Africa's brutal policy of racial segregation known as apartheid after 1948.

QUESTIONS FOR ANALYSIS

1. In what ways did Rhodes's career epitomize the New Imperialism in Africa?
2. How did Rhodes relate to Afrikaners and to black Africans? How do you account for the differences and the similarities?

*Robert I. Rotberg, *The Founder: Cecil Rhodes and the Pursuit of Power* (New York: Oxford University Press, 1988), p. 150.

†Rotberg, *The Founder*, p. 408.

"self-governing" colony but still under British control. Gradually, however, the defeated Afrikaners used their numerical superiority over the British settlers to take political power, as even the most educated nonwhites lost the right to vote, except in the Cape Colony.

The British also fought to enlarge their colonies in West Africa, pushing northward from the Cape Colony, westward from Zanzibar, and southward from Egypt. In 1885 British troops stationed in the Sudanese city of Khartoum, an outpost on the Nile that protected imperial interests in Egypt, were massacred by fiercely independent Muslim Sudanese.

A decade later the British sought to establish permanent rule in Sudanese territory. Under the command of General Sir Herbert Kitchener (who would serve Britain as secretary of state for war during World War I), a well-armed force moved cautiously and more successfully up the Nile River, building a railroad to supply arms and reinforcements as it went. Finally, in 1898 these British troops confronted the poorly armed Sudanese army at the Battle of Omdurman (ahm-duhr-MAHN) (see Map 24.2). Sudanese soldiers charged the British lines time and time again, only to be cut down by the recently invented Maxim machine gun. In the solemn words of one English observer, "It was not a battle but an execution. The bodies were . . . spread evenly over acres and acres." In the end, about 10,000 Sudanese soldiers lay dead, while 28 Britons had been killed and 145 wounded.[5]

Continuing up the Nile after the battle, Kitchener's armies found that a small French force had already occupied the village of Fashoda (fuh-SHOH-duh). Locked in imperial competition with Britain ever since the British occupation of Egypt, France had tried to be first to reach one of Africa's last areas unclaimed by Europeans—the upper reaches of the Nile. The result was a serious diplomatic crisis known as the **Fashoda Incident**, which brought the threat of war between two major European powers. Wracked by the Dreyfus affair (see "Republican France and the Third French Republic" in Chapter 23) and unwilling to fight, France eventually backed down and withdrew its forces, allowing the British to take over.

The British conquest of Sudan exemplifies the general process of empire building in Africa. Like the Muslim-Sudanese force at Omdurman, or the Herero and Nama in German South West Africa, native peoples who openly resisted European control were blown away by vastly superior military force. But as the Fashoda Incident showed, however much the European powers squabbled for territory around the world, they stopped short of actually fighting one other. Imperial ambitions were not worth a great European war.

■ **Fashoda Incident** French colonial troops backed down in this 1898 diplomatic crisis caused by British-French competition over African territory in present-day South Sudan, preventing a European Great Power war over imperialist ambitions.

Imperialism in Asia

Although their sudden division of Africa was more spectacular, Europeans also exerted political control over much of Asia. Along with the British in India, the Dutch in present-day Indonesia were major players. In 1815 the Dutch ruled little more than the island of Java in the East Indies. Thereafter they gradually brought almost all of the three-thousand-mile Malay Archipelago under their political authority, though—in good imperialist fashion—they had to share some of the spoils with Britain and Germany. In the critical decade of the 1880s, the French under the leadership of Jules Ferry took Indochina (Map 24.3).

Russians also acquired territories in Asia, moving steadily forward on two fronts throughout the nineteenth century. To the south they conquered Muslim areas in the Caucasus and in Central Asia, reaching the border of Afghanistan in 1885. To the east they nibbled on China's outlying provinces, especially in the 1890s.

The United States likewise widened its imperialist sights, taking the Philippines from Spain in 1898 through the Spanish-American War. When it quickly became clear that the United States had no intention of granting the independence it had promised, Philippine patriots rose in revolt and were suppressed only after long, bitter fighting. Some Americans protested the taking of the Philippines, but to no avail. Thus another great Western power joined the imperialist ranks in Asia.

Causes of the New Imperialism

Many factors contributed to the late-nineteenth-century rush for empire. First, economic motives were important in the extension of political empires, especially in the British Empire. By the late 1870s France, Germany, and the United States were industrializing rapidly behind rising tariff barriers. Great Britain was losing its early economic lead and facing increasingly tough competition in foreign markets. In this changing economic climate, the seizure of Asian and African territory by continental powers in the 1880s raised alarms in Britain. Fearing that France and Germany would seal off their empires with high tariffs, resulting in the permanent loss of future economic opportunities, the British followed suit and began their own push to expand empire.

Actually, the overall economic gains of the New Imperialism proved quite limited before 1914. The new colonies were simply too poor to buy much, and they offered few immediately profitable investments. Nonetheless, even the poorest, most barren desert was jealously prized, and no territory was ever abandoned because each leading country saw colonies as crucial to national security and military power. For instance, safeguarding the Suez Canal played a key role in the British occupation of Egypt, and protecting Egypt in

MAP 24.3 Asia in 1914 India remained under British rule, while China preserved a precarious political independence. The Dutch Empire in modern-day Indonesia was old, but French control of Indochina was a product of the New Imperialism. Russia continued to expand to the south and to the east as well.

turn led to the bloody conquest of Sudan. Far-flung possessions guaranteed ever-growing navies the safe havens and the dependable coaling stations they needed in time of crisis or war.

Along with economic motives, many people were convinced that colonies were essential to great nations. "There has never been a great power without great colonies," concluded one French publicist. The influential nationalist historian of Germany, Heinrich von Treitschke, spoke for many when he wrote: "Every virile people has established colonial power. . . . All great nations in the fullness of their strength have desired to set their mark upon barbarian lands and those who fail to participate in this great rivalry will play a pitiable role in time to come."[6]

Treitschke's harsh statement reflects not only the increasing aggressiveness of European nationalism after Bismarck's wars of German unification, but also Social Darwinian theories of brutal competition among races and nations. The strongest nation, in this view, would always conquer the weaker in the grand race for national survival and domination. Thus European nations—in their imagined role as racially distinct representatives of the superior white race—had to seize colonies to show they were strong and powerful. Moreover, since victory of the fittest in the struggle for survival was nature's inescapable law, the conquest of "inferior" peoples was just. "The path of progress is strewn with the wreck . . . of inferior races," wrote one professor in 1900. "Yet these dead peoples are, in very truth, the stepping stones on which mankind has risen to the higher intellectual and deeper emotional life of today."[7] Social Darwinism and pseudoscientific racial doctrines fostered imperialist expansion.

So did the Western world's unprecedented technological and military superiority. Three aspects were particularly important. First, the rapidly firing Maxim machine

Tools for Empire Building Western technological advances aided Western political ambitions in Africa and Asia. The Maxim machine gun shown at far right was highly mobile and could lay down a continuous barrage that would decimate charging enemies, as in the slaughter of Muslim soldiers at the Battle of Omdurman in the Sudan. Quinine (near right) was also very important to empire building. First taken around 1850 to prevent the contraction of deadly malaria, quinine enabled European soldiers and officials to move safely into the African interior and conquer indigenous peoples. (quinine: Science Museum, London, UK, CC BY/Wellcome Images; gun: © Lordprice Collection/Alamy)

gun, so lethal at Omdurman, was an ultimate weapon in many another unequal battle. Second, newly discovered quinine proved effective in controlling malaria, which had previously decimated whites in the tropics whenever they left breezy coastal enclaves and dared to venture into mosquito-infested interiors. Third, the steamship and the international telegraph permitted Western powers to quickly concentrate their firepower in a given area when it was needed. Never before—and never again after 1914—would the technological gap between the West and non-Western regions of the world be so great.

Attempts to manage social tensions and domestic political conflicts in Europe contributed to overseas expansion. In Germany and Russia, and in other countries to a lesser extent, conservative political leaders manipulated colonial issues to divert popular attention from the class struggle at home and to create a false sense of national unity. Thus imperial propagandists relentlessly stressed that colonies benefited workers as well as capitalists, providing jobs and cheap raw materials that raised workers' standard of living. Government leaders and their allies in the tabloid press successfully encouraged the masses to savor foreign triumphs and to glory in the supposed increase in national prestige. In short, conservative leaders defined imperialism as a national necessity, which they used to justify the status quo and their hold on power.

Finally, certain special-interest groups in each country were powerful agents of expansion. White settlers in the colonial areas demanded more land and greater state protection. Missionaries and humanitarians wanted to spread religion and stop the slave trade within Africa. Shipping companies wanted lucrative subsidies to protect rapidly growing global trade. Military men and colonial officials foresaw rapid advancement and highly paid positions in growing empires. The actions of such groups pushed the course of empire forward.

A "Civilizing Mission"

Western society did not rest the case for empire solely on naked conquest and a Darwinian racial struggle, or on power politics and the need for naval bases on every ocean. Imperialists developed additional arguments for imperialism to satisfy their consciences and answer their critics. A favorite idea was that Westerners could and should civilize more primitive nonwhite peoples. Supposedly "savage" Africans and Asians would eventually receive the benefits of industrialization and urbanization, Western education, Christianity, advanced medicine, and finally higher standards of living. In time, they might be ready for self-government and Western democracy. Thus the French repeatedly spoke of their imperial endeavors as a sacred "civilizing mission." As one German missionary put it, prayer and hard work under German direction would lead "the work-shy native to work of his own free will" and thus lead him to "an existence fit for human beings."[8] Another argument was that imperial government protected natives from tribal warfare as well as from cruder forms of exploitation by white settlers and business people. In 1899 Rudyard Kipling (1865–1936), who wrote masterfully of Anglo-Indian life and was perhaps the most influential British writer of the 1890s, summarized such ideas in his poem "The White Man's Burden." (See "Viewpoints: The White Man's Versus the Brown Man's Burden," page 749.)

VIEWPOINTS

The White Man's Versus the Brown Man's Burden

When it was first published in an American illustrated magazine for the middle classes in 1899, Rudyard Kipling's well-known poem was read as encouragement for U.S. occupation of the Philippines in the aftermath of the Spanish-American War. It has since been understood as a forceful if somewhat anxious justification for Western imperialism in general. As soon as it was published, the poem drew mockery from anti-imperialist intellectuals and politicians. In 1899 British publisher and Parliament member Henry Labouchère, known for his inflammatory views on any number of contemporary issues, wrote one of the most famous satires of Kipling's poem.

Rudyard Kipling, "The White Man's Burden"

Take up the White Man's Burden —
  Send forth the best ye breed —
Go, bind your sons to exile
  To serve your captive's 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 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 iron 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 those 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 will or whisper,
  By all ye leave or do,
The silent sullen peoples
  Shall weigh your God 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.

Henry Labouchère, "The Brown Man's Burden"

Pile on the brown man's burden
  To gratify your greed;
Go clear away the "niggers"
  Who progress would impede;
Be very stern, for truly
  'Tis useless to be mild
With new-caught, sullen peoples,
  Half devil and half child.

Pile on the brown man's burden;
  And if ye rouse his hate,
Meet his old-fashioned reasons
  With Maxims up to date.
With shells and dumdum bullets
  A hundred times made plain
The brown man's loss must ever
  Imply the white man's gain. . . .

Pile on the brown man's burden,
  And if his cry be sore,
That surely need not irk you —
  Ye've driven slaves before.
Seize on his ports and pastures,
  The fields his people tread;
Go make from them your living,
  And mark them with his dead.

Pile on the brown man's burden,
  Nor do not deem it hard
If you should earn the rancor
  Of these ye yearn to guard,
The screaming of your eagle
  Will drown the victim's sob —
Go on through fire and slaughter,
  There's dollars in the job.

Pile on the brown man's burden,
  And through the world proclaim
That ye are freedom's agent —
  There's no more paying game!
And should your own past history
  Straight in your teeth be thrown,
Retort that independence
  Is good for whites alone.

Pile on the brown man's burden,
  With equity have done;
Weak, antiquated scruples
  Their squeamish course have run,
And though 'tis freedom's banner
  You're waving in the van,
Reserve for home consumption
  The sacred "rights of man"!

QUESTIONS FOR ANALYSIS

1. What, exactly, is the "white man's burden"? What, according to Kipling, are the costs and rewards of undertaking the "civilizing mission"?
2. How does Labouchère mock Kipling's poem? What, according to Labouchère, drives the imperial project?

Source: Reprinted in "The White Man's Versus the Brown Man's Burden," *The Literary Digest*, vol. 18, no. 8 (New York: Funk and Wagnalls, 1899), p. 219.

Outside of Europe, many Americans also accepted the ideology of the **white man's burden**. It was an important factor in the decision to rule, rather than liberate, the Philippines after the Spanish-American War. Like their European counterparts, these Americans believed that their civilization had reached unprecedented heights and that they had unique benefits to bestow on supposedly less advanced peoples.

Though the colonial administrators and generals in charge of imperial endeavors were men, European women played a central role in the "civilizing mission." Europeans who embraced the "white man's burden" believed that the presence of white women in the colonies might help stop what they called "race mixing": the tendency of European men to establish relationships or cross-race marriages with indigenous women. Proponents of imperial expansion actively encouraged women to serve in the colonies, and many answered the call. Some women worked as colonial missionaries, teachers, and nurses; others accompanied their husbands overseas. If they stayed in the colonies long enough to establish a semipermanent household, European women might oversee native servants. Colonial encounters thus established complicated social hierarchies that entangled race, class, and gender. (See "Thinking Like a Historian: Women and Empire," page 752.)

European control also facilitated the spread of Christianity. Catholic and Protestant missionaries—both men and women—competed with Islam and native religions south of the Sahara, seeking converts and building schools. Many Africans' first real contact with whites was in mission schools. Some peoples, such as the Ibo in Nigeria, became highly Christianized.

Such occasional successes in sub-Saharan Africa contrasted with the general failure of missionary efforts in India, China, and the Islamic world. There Christians often preached in vain to peoples with ancient, complex religious beliefs. Yet the number of Christian believers around the world did increase substantially in the nineteenth century, and missionary groups kept trying.

Orientalism

Even though many Westerners felt superior to non-Western peoples, they were often fascinated by foreign cultures. In the late 1970s the literary scholar Edward Said (sigh-EED) (1935–2003) coined the term **Orientalism** to describe this fascination and the stereotypical and often racist Western understandings of non-Westerners. Said originally used "Orientalism" to refer to the way Europeans viewed Arab societies in North Africa and the Middle East. The term caught on, however, and is often used more broadly to refer to Western views of non-Western peoples across the globe.

Said believed that it was almost impossible for people in the West to look at or understand

A Missionary School A Swahili schoolboy leads his classmates in a reading lesson in Dar es Salaam in German East Africa (now Tanzania) in 1903; portraits of Emperor Wilhelm II and his wife look down on the classroom, a reminder of imperial control. Europeans argued that they were spreading the benefits of a superior civilization with schools like this one, which is unusually well built and furnished because of its strategic location in the German-controlled territory's capital city. Schoolrooms were typically segregated by sex, and lessons for young men and women adhered to Western notions of gender difference. (ullstein bild/Granger — All rights reserved)

Orientalism in Western Society This "Official Guide" to an exhibition on Cairo held in Berlin offered Europeans an exotic look at foreign lands. Note the veiled women in the center and the pyramid and desert mosque in the background. Stereotyped Western impressions of Arabs and the Islamic world became increasingly popular in the West in the nineteenth century. This wave of Orientalism found expression in high art but also in everyday life, when ordinary people visited museum exhibits, read newspaper articles, or purchased popular colonial products like cigarettes, coffee, and chocolate. (Private Collection/Archives Charmet/Bridgeman Images)

non-Westerners without falling into an Orientalist stereotype. Politicians, scholarly experts, writers and artists, and ordinary people readily adopted "us versus them" views of foreign peoples. The West, they believed, was modern, while the non-West was primitive. The West was white, the non-West colored; the West was rational, the non-West emotional; the West was Christian, the non-West pagan or Islamic. As part of this view, Westerners imagined the Orient as a place of mystery and romance, populated with exotic, dark-skinned peoples, where Westerners might have exciting experiences of foreign societies and cultures.

Such views swept through North American and European scholarship, arts, and literature in the late nineteenth century. The emergence of ethnography and anthropology as academic disciplines in the 1880s was part of the process. Inspired by a new culture of collecting, scholars and adventurers went into the field, where they studied supposedly primitive cultures and traded for, bought, or stole artifacts from non-Western peoples. The results of their work were reported in scientific studies, articles, and books, and intriguing objects filled the display cases of new public museums of ethnography and natural history. A slew of novels published around 1900 portrayed romance and high adventure in the colonies. Artists followed suit, and dramatic paintings of ferocious Arab warriors, Eastern slave markets, and the sultan's harem adorned museum walls and wealthy middle-class parlors.

Scholars, authors, and artists were not necessarily racists or imperialists, but as Said explained, they found it difficult to escape Orientalist stereotypes. In the end they helped justify colonial expansion and spread notions of Western superiority.

European Critics of Imperialism

The expansion of empire aroused sharp, even bitter, critics. A forceful attack was made by radical English economist J. A. Hobson (1858–1940) in *Imperialism* (1902), a work that influenced Lenin and others. Deeply angered by British tactics during the unpopular South African (Boer) War, Hobson contended that the rush to acquire colonies was due to the economic needs of unregulated capitalism, particularly the need of the rich to find outlets for their surplus capital. Yet, Hobson argued, only unscrupulous special-interest groups profited from imperial possessions, at the expense of both European working-class taxpayers and indigenous peoples. Moreover, the quest for empire diverted popular

white man's burden The idea that Europeans could and should civilize more primitive nonwhite peoples and that imperialism would eventually provide nonwhites with modern achievements and higher standards of living.

Orientalism A term coined by literary scholar Edward Said to describe the way Westerners described and misunderstood colonial subjects and cultures.

THINKING LIKE A HISTORIAN

Women and Empire

Though men played dominant roles in colonial territories, European women also worked as educators, missionaries, nurses, and housewives. What was life like for European women in the colonies?

1 ***The Complete Indian Housekeeper & Cook*, 1898.** This book on household management described the domestic duties of the elite British woman (the "memsahib") in colonial India. It is shot through with notions of racial difference and superiority.

This book, it is hoped, will meet the very generally felt want for a practical guide to young housekeepers in India. A large proportion of English ladies in this country come to it newly married, to begin a new life, and take up new responsibilities under absolutely new conditions. . . .

The first duty of a mistress is, of course, to be able to give intelligible orders to her servants; therefore it is necessary she should learn to speak Hindustani. . . .

The second duty is obviously to insist on her orders being carried out. And here we come to the burning question, "how is this to be done?" . . . The secret lies in making rules, and keeping to them. The Indian servant is a child in everything save age, and should be treated as a child; that is to say, kindly, but with the greatest firmness. . . . [F]irst faults should never go unpunished. By overlooking a first offence, we lose the only opportunity we have of preventing it becoming a habit. . . .

In their own experience the authors have found a system of rewards and punishments perfectly easy of attainment. One of them has for years adopted the plan of engaging her servants at so much a month—the lowest rate at which such service is obtainable—and so much extra as buksheesh [a tip or bribe], conditional on good service. . . . Of course common sense is required to adjust the balance of rewards and punishments, for here again Indian servants are like children, in that they have an acute sense of justice. . . .

We do not wish to advocate an unholy haughtiness; but an Indian household can no more be governed peacefully, without dignity and prestige, than an Indian empire.

2 **Elspeth Huxley, *The Flame Trees of Thika*, 1959.** In her memoir, Elspeth Huxley described her childhood in British Kenya on the eve of the First World War.

Juma [the family's male Kenyan servant] had a patronizing air that [my mother] resented, and she doubted if he was showing enough respect. Those were the days when to lack respect was a more serious crime than to neglect a child, bewitch a man or steal a cow, and was generally punishable by beating. Indeed respect was the only protection available to Europeans who lived singly, or in scattered families, among thousands of Africans accustomed to constant warfare and armed with spears and poisoned arrows, but had themselves no barricades, and went about unarmed. This respect preserved them [the Europeans] like an invisible coat of mail, or a form of magic, and seldom failed; but it had to be very carefully guarded.

3 **Arguments for "race mixing" in Germany's African colonies.** When Germans first claimed African colonies in the mid-1880s, settlers often married or had close relations with African women.

Max Buchner, *colonial bureaucrat*

As for free social intercourse with the daughters of the country [African colonial subjects], it is to be seen as more helpful than harmful to health. The eternal feminine, also under dark skin, is an excellent charm against low spirits, to which one is so vulnerable in the solitude of Africa.

Carl Büttner, *prominent missionary*

Frau Kleinschmidt [the Nama-African wife of a German missionary] is *highly respected* by whites and natives. . . . [H]er household could be a *model* for all the whites living in Damaraland [central Namibia]. . . . In short, this entire family [with seven children], descended from a mixed marriage, has had an *important* role in the development of this land and one can only wish that there be more like it.

ANALYZING THE EVIDENCE

1. What does the evidence presented in Sources 1–2 and 5–6 reveal about the relationships between European women and colonial subjects? What are the main points of contact and concern?
2. Why is respect a key element in the relationship between colonizers and colonized (Sources 1 and 2)? Why would it be particularly important to women like Elspeth Huxley?
3. In Sources 3 and 4, what are the main arguments for and against "race mixing" in the German colonies? How do they draw on stereotypes about Europeans and Africans?

4 Arguments against "race mixing" in Germany's African colonies. After about 1900, colonial authorities tried to halt "race mixing" by condemning and outlawing interracial marriage and encouraging German women to move to colonial Africa.

Paul Rohrbach, *colonial bureaucrat*

[German men are ruined by] keeping a filthy house with the lazy, ignorant, indolent, in a word barbaric and in almost every respect base colored wenches. [German men] for years and years have had no other contact with women besides this intercourse that is down-dragging, demoralizing, and nothing but coarse sensuality.

Editorial, *Hamburg News*, 1912

The tolerance of mixed marriages would deeply degrade the prestige of the white race in Central Africa and would severely endanger the white women. Mixed marriages would then be permissible for white women as well, with native men. The white woman would thereby lose the only thing that offers her an unconditional protection from attacks in the colonies today, the respect of the colored.

Editorial, *Usambara Post*, 1912

The European woman alone can solve the problem [of race mixing]. Only she can accomplish something positive, all so-called disciplinary measures belong to the realm of prohibitive and negative decrees, in which no real value resides: nature cannot be driven out with a pitchfork.

(Mansell/The LIFE Picture Collection/Getty Images)

5 Photograph of a British tea party in India, 1896. Class, race, and gender come together in this revealing photograph of an elite group of British colonists enjoying their tea, accompanied by Indian servants. The British "memsahib" at the center of the picture rests her feet on a tiger-skin rug and holds a tiger cub in her lap.

6 Timetable for the Christian Missionary Society Girl's School, Ibadan, Nigeria, 1908. Nigerian schoolchildren learned Western domestic tasks at European missionary schools.

5:00 A.M.	Prepare food, fetch water from river for baths, house, and kitchen
6:15–7:00	Quiet time and prayers
7:00	Domestic Work*
8:00	School
12:00 P.M.	Dinner
1:30	School
3:30	Recreation
4:00	Domestic Work*
6:00	Supper
7:15	Home Lessons
8:15	Prayers

Total time devoted to course work (including domestic subjects): 6 hours
Total time devoted to domestic chores: 4 hours, 15 minutes
*Note: "Domestic Work" tasks varied day by day and could include housework, laundry, ironing, preparing food, gardening, and cleaning.

PUTTING IT ALL TOGETHER

European women played a major role in the colonies during the era of New Imperialism. Using the sources above, along with what you have learned in class and in this chapter, write a short essay that describes their experience. How did ideas about race and gender help define the relationship between European colonizers and their colonial subjects?

Sources: (1) F. A. Steel and G. Gardiner, *The Complete Indian Housekeeper & Cook* (London: Heinemann, 1898), pp. 1–4, 9; (2) Quoted in Margaret Strobel, *European Women and the Second British Empire* (Bloomington: Indiana University Press, 1991), p. 23; (3, 4) All quotes from Lora Wildenthal, *German Women for Empire, 1884–1945* (Durham, N.C.: Duke University Press, 2001), pp. 81, 86–87, 103, 120–121; (6) "Timetable" in LaRay Denzer, "Domestic Science Training in Colonial Yorubaland, Nigeria," in *African Encounters with Domesticity*, ed. Karen Tranberg Hansen (New Brunswick, N.J.: Rutgers University Press, 1992), p. 119.

attention away from domestic reform and the need to reduce the great gap between rich and poor.

Like Hobson, Marxist critics offered a thorough critique of Western imperialism. Rosa Luxemburg, a radical member of the German Social Democratic Party, argued that capitalism needed to expand into noncapitalist Asia and Africa to maintain high profits. The Russian Marxist and future revolutionary leader Vladimir Lenin concluded that imperialism represented the "highest stage" of advanced monopoly capitalism and predicted that its onset signaled the decay and coming collapse of capitalist society. These and similar arguments were not very persuasive, however. Most people then (and now) were sold on the idea that imperialism was profitable for the homeland and beneficial to the colonized.

Hobson and other critics struck home, however, with their moral condemnation of whites' imperious rule of nonwhites. They rebelled against crude Social Darwinian thought. "O Evolution, what crimes are committed in thy name!" cried one foe. Another sardonically coined a new beatitude: "Blessed are the strong, for they shall prey on the weak."[9] Kipling and his kind were lampooned as racist bullies whose rule rested on brutality, racial contempt, and the Maxim gun. (See "Viewpoints: The White Man's Versus the Brown Man's Burden," page 749.) Similarly, in 1902 in the novel *Heart of Darkness*—a demolishing critique of the Belgian exploitation of the Congo—Polish-born novelist Joseph Conrad (1857–1924) castigated the "pure selfishness" of Europeans in supposedly civilizing Africa. The main character, once a liberal scholar, turns into a savage brute.

Critics charged Europeans with applying a degrading double standard and failing to live up to their own noble ideals. At home, Europeans had won or were winning representative government, individual liberties, and a certain equality of opportunity. In their empires, Europeans imposed military dictatorships. Colonial administrators forced Africans and Asians to work involuntarily, almost like slaves, and subjected them to shameless discrimination. Only by renouncing imperialism, its critics insisted, and giving captive peoples the freedoms Western society had struggled for since the French Revolution would Europeans be worthy of their traditions.

How did non-Westerners respond to Western expansion?

To Africans and Asians, Western expansion was a profoundly disruptive assault on existing ruling classes, local economies, and long-standing ways of life. Christian missionaries and European secular ideologies challenged established beliefs and values. Non-Western peoples experienced imperialism as an invasion, one made all the more painful by the power and arrogance of the European intruders.

The Patterns of Response

Generally, the initial response of African and Asian rulers to aggressive Western expansion was to try to drive the unwelcome foreigners away. This was the case in China, Japan, and Sudan. Violent antiforeign reactions exploded elsewhere again and again, as in the lengthy U.S.-Indian wars, but the superior military technology of the industrialized West almost invariably prevailed. Beaten in battle, many Africans and Asians concentrated on preserving their cultural traditions at all costs. Others found themselves forced to reconsider their initial hostility. Some (such as Ismail of Egypt) concluded that the West was indeed superior in some ways and that it was therefore necessary to copy some European achievements, especially if they wished to escape full-blown Western political rule.

Thus one can think of responses to the Western impact as a spectrum, with "traditionalists" at one end, "westernizers" or "modernizers" at the other, and many shades of opinion in between. Both before and after European domination, the internal struggle among these groups was often intense. With time, however, the modernizers tended to gain the upper hand.

When the power of both the traditionalists and the modernizers was shattered by superior force, some Asians and Africans accepted imperial rule. Political participation in non-Western lands was historically limited to small elites, and ordinary people often did what their rulers told them to do. Europeans, clothed in power and convinced of their righteousness, tried to govern smoothly and effectively. At times they received considerable support from both traditionalists (local chiefs, landowners, religious leaders) and modernizers (Western-educated professional classes and civil servants).

Nevertheless, imperial rule was in many ways an imposing edifice built on sand. Support for European rule among subjugated peoples was shallow and weak. Colonized lands were primarily peasant societies, and much of the burden of colonization fell on small farmers who tenaciously fought for some measure of autonomy. When colonists demanded extra taxes or crops, peasants played dumb and hid the extent of their harvest; when colonists asked for increased labor, peasants dragged their feet. These everyday forms of evasion and resistance—termed "weapons of the weak" by one historian—stopped short of open defiance but nonetheless presented a real challenge to Western rule.[10] Moreover, leaders

always arose to openly oppose the Europeans, for at least two basic reasons.

First, the nonconformists — the eventual anti-imperialist leaders — developed a burning desire for human dignity, economic emancipation, and political independence. Second, potential leaders ironically found in the Western world the ideologies underlying and justifying their protest. They discovered liberalism, with its credos of civil liberties and political self-determination. They echoed the demands of anti-imperialists in Europe and America that the West live up to its own ideals. Above all, they found themselves attracted to nationalism, which asserted that every people had the right to control its own destiny. After 1917 anti-imperialist revolt would find another European-made weapon in Lenin's version of Marxist socialism. Thus the anti-imperialist search for dignity drew strength from Western thought and culture, particularly in three major Asian countries — India, Japan, and China.

The British Empire in India

India was the jewel of the British Empire, and no colonial area experienced a more profound British impact. Unlike Japan and China, which maintained a real if precarious independence, and unlike African territories, which Europeans annexed only at the end of the nineteenth century, India was ruled more or less absolutely by Britain for a very long time.

Arriving in India on the heels of the Portuguese in the seventeenth century, the British East India Company had conquered the last independent native state by 1848. The last "traditional" response to British rule by the existing ruling groups — an attempt to drive the invaders out by military force — was broken in 1857 and 1858 in the **Great Rebellion** (which the British called a "mutiny"). This insurrection by Muslim and Hindu mercenaries in the British army spread throughout northern and central India before it was finally put down, primarily by loyal indigenous troops from southern India. Britain then established direct control until Indian independence was gained in 1947.

India was ruled by the British Parliament in London and administered by a tiny, all-white civil service in India. In 1900 this elite consisted of fewer than 3,500 top officials, who controlled a population of 300 million. The white elite, backed by white officers and indigenous troops, was competent and generally well disposed toward the welfare of the Indian population. Yet it practiced strict job discrimination and social segregation, and most of its members saw the jumble of Indian peoples and castes as racially inferior. Elite colonial administrators and military leaders like Lord Kitchener believed in the "inherent superiority of the European" in India. As Kitchener put it, "however well educated and clever a native may be, and however brave he may prove himself, I believe that no rank we can bestow on him would cause him to be considered an equal of the British officer."[11]

The Great Rebellion, 1857–1858

British women played an important part in the imperial enterprise, especially after the opening of the Suez Canal in 1869 made it much easier for civil servants and businessmen to bring their wives and children with them to India. British families tended to live in separate communities, where they occupied large houses with well-shaded porches, handsome lawns, and a multitude of servants. It was the wife's responsibility to manage this complex household. Many officials' wives learned to relish their duties, and they directed their households and servants with the same self-confident authoritarianism that characterized their husbands' political rule.

A small minority of British women — feminists, social reformers, or missionaries, both married and single — sought to go further and shoulder the "white women's burden" in India.[12] These women tried especially to improve the lives of Indian women, both Hindu and Muslim, promoting education and legislation to move them closer to the better conditions they believed Western women had attained. Their greatest success was educating some elite Hindu women who took up the cause of reform.

Inspired by the "civilizing mission" and strong feelings of racial superiority, British imperialists worked energetically to westernize Indian society. Realizing that they needed well-educated Indians to serve as skilled subordinates in both the government and the army, the British established a modern system of secondary education, with all instruction in English. Thus some Indians gained excellent opportunities for economic and social advancement. High-caste Hindus, particularly quick to respond, emerged as skillful intermediaries between the British rulers and the Indian people, and soon they formed a new elite profoundly influenced by Western thought and culture.

This new Indian elite joined British officials and businessmen to promote modern economic development, constructing irrigation projects for agriculture,

■ **Great Rebellion** The 1857 and 1858 insurrection by Muslim and Hindu mercenaries in the British army that spread throughout northern and central India before finally being crushed.

building the world's third-largest railroad network, and forming large tea and jute plantations geared to the world economy. Unfortunately, the lot of the Indian masses improved little, for the profits went to indigenous and British elites.

Finally, the British created a unified, powerful state with a well-educated, English-speaking Indian bureaucracy. They placed under the same system of law and administration the different Hindu and Muslim peoples and the vanquished kingdoms of the entire subcontinent—groups that had fought each other for centuries and had been repeatedly conquered by Muslim and Mongol invaders. It was as if Europe, with its many states and varieties of Christianity, had been conquered and united in a single great empire.

The transformation of India engendered a decisive reaction to European rule: the rise of national resistance among the Indian elite. No matter how anglicized and necessary a member of the indigenous educated classes became, he or she could never become the white ruler's equal. The top jobs, the best clubs, the modern hotels, and even certain railroad compartments were off limits to Indians. Racial discrimination meant injured pride and bitter injustice. It flagrantly contradicted the cherished Western concepts of human rights and equality that the Indian elite had learned about in Western schools. Moreover, it was based on dictatorship, no matter how benign.

By 1885, when educated Indians came together to found the predominantly Hindu Indian National Congress, demands were increasing for the equality and self-government that Britain had already granted white-settler colonies, such as Canada and Australia. By 1907, emboldened in part by Japan's success (see the next section, "Reforming Japan"), a radical faction in the Indian National Congress called for Indian independence. Although Hindus and Muslims disagreed on what shape the Indian future should take, Indians were finding an answer to the foreign challenge. The experience of discriminatory British rule and exposure to liberal Western ideals, along with the revitalization of the Hindu religion and the determined resistance to colonial abuse, had created a genuine movement for national independence.

Reforming Japan

When Commodore Matthew Perry arrived in Tokyo in 1853 with his crude but effective gunboat diplomacy, Japan was a complex feudal society. At the top stood a figurehead emperor, but real power was in the hands of a hereditary military governor, the shogun. With the help of a warrior nobility known as samurai, the shogun governed a country of hardworking, productive peasants and city dwellers. The intensely proud samurai were deeply angered by the sudden American intrusion and the unequal treaties with Western countries that followed.

When foreign diplomats and merchants began to settle in Yokohama, radical samurai reacted with a wave of antiforeign terrorism and antigovernment assassinations that lasted from 1858 to 1863. In response, American, British, Dutch, and French warships demolished key forts, further weakening the power and prestige of the shogun's government. Then in 1867 a coalition led by patriotic samurai seized control of the government with hardly any bloodshed and restored the political power of the emperor in the **Meiji Restoration**, a great turning point in Japanese history.

The battle cry of the Meiji (MAY-jee) reformers was "Enrich the state and strengthen the armed forces," and their immediate goal was to meet the foreign threat. Yet how were these tasks to be accomplished? In a remarkable about-face, the leaders of Meiji Japan dropped their antiforeign attacks. Convinced that Western civilization was indeed superior in its military and industrial aspects, they initiated a series of measures to reform Japan along modern lines. In the broadest sense, the Meiji leaders tried to harness Western models of industrialization and political reform to protect their country and catch up with Europe.

In 1871 the new leaders abolished the old feudal structure of aristocratic, decentralized government and formed a strong unified state. Following the example of the French Revolution, they dismantled the four-class legal system and declared social equality. They decreed freedom of movement in a country where traveling abroad had been a serious crime. They created a free, competitive, government-stimulated economy. Japan began to build railroads and modern factories. In addition, Japan skillfully adapted the West's science and technology, particularly in industry, medicine, and education, and many Japanese studied abroad. The government paid large salaries to attract foreign experts, who were replaced by trained Japanese as soon as possible.

Yet the overriding concern of Japan's political leadership was always to maintain a powerful state and a strong military. State leaders created a powerful modern navy and completely reorganized the army along European lines, forming a professional officer corps and requiring three years of military service of all males. This army of draftees effectively put down disturbances in the countryside, and in 1877 it crushed a major rebellion by feudal elements protesting the loss of their privileges.

By 1890, when the new state was firmly established, the wholesale borrowing of the early restoration had given way to a more selective emphasis on those things

■ **Meiji Restoration** The restoration of the Japanese emperor to power in 1867, leading to the subsequent modernization of Japan.

The Russo-Japanese War, 1904–1905 This 1904 Japanese print portrays the surprise Japanese naval attack on the Russian fleet at Port Arthur as a glorious victory. Though the opening battle was in fact inconclusive, with few losses on either side, the Japanese won the war. The Japanese victory over a European "Great Power" inspired anticolonial independence movements in East Asia. In Russia, defeat by a supposedly "primitive" Asian nation encouraged reform movements in the Russian Empire and became a factor in the outbreak of the Russian Revolution of 1905 (see Chapter 23). (Universal Images Group/Getty Images)

foreign that were in keeping with Japanese tradition. Following the model of the German Empire, Japan established an authoritarian constitution and rejected democracy. The power of the emperor and his ministers was vast, that of the legislature limited.

Japan also successfully copied the imperialism of Western society. Expansion proved that Japan was strong and cemented the nation together in a great mission. Having "opened" Korea with its own gunboat diplomacy in 1876, Japan decisively defeated China in the Sino-Japanese War fought over Korean territory in 1894 and 1895 and took Formosa (modern-day Taiwan). In the next years, Japan competed aggressively with European powers for influence and territory in China, particularly in Manchuria, where Japanese and Russian imperialism collided. In 1904 Japan launched the Russo-Japanese War (1904–1905) by attacking Russia without a formal declaration of war. After a series of bloody battles, Japan took over Russia's former protectorate in Port Arthur and emerged with a valuable foothold in China (see Map 24.3). By 1910, with the annexation of Korea, Japan had become a major imperial power.

Japan became the first non-Western country to combine European-style economic and political reforms with its own long-standing values and traditions in order to meet the many-sided challenge of Western expansion. Moreover, Japan demonstrated that a modern Asian nation could defeat and humble Russia, a great Western power. Japan's achievement fascinated many Chinese and Vietnamese nationalists and provided patriots throughout Asia and Africa with an inspiring example of national recovery and liberation.

Toward Revolution in China

In 1860 the two-hundred-year-old Qing Dynasty in China appeared on the verge of collapse. Efforts to repel foreigners had failed, and rebellion and chaos wracked the country. Yet the government drew on its traditional strengths and made a surprising comeback that lasted more than thirty years.

Demonizing the Boxer Rebellion The Sunday supplement to *Le Petit Parisien*, a popular French newspaper, ran a series of gruesome front-page pictures of ferocious Boxers burning buildings, murdering priests, and slaughtering Chinese Christians. In this 1910 illustration, Boxer rebels invade a church in Mukden, Manchuria, and massacre the Christian worshippers. Whipping up European outrage about Chinese atrocities was a prelude to harsh reprisals by the Western powers. (Print Collector/Getty Images)

Two factors were crucial in this reversal. First, the traditional ruling groups temporarily produced new and effective leadership. Loyal scholar-statesmen and generals quelled disturbances such as the great Tai Ping rebellion. The remarkable empress dowager Tzu Hsi (tsoo shee) governed in the name of her young son, combining shrewd insight with vigorous action to revitalize the bureaucracy.

Second, destructive foreign aggression lessened, for the Europeans had obtained their primary goal of establishing commercial and diplomatic relations. Indeed, some Europeans contributed to the dynasty's recovery. A talented Irishman effectively reorganized China's customs office, increasing government tax receipts, and a sympathetic American diplomat represented China in foreign lands, helping to strengthen the Chinese government. Such efforts dovetailed with the dynasty's efforts to adopt some aspects of Western government and technology while maintaining traditional Chinese values and beliefs.

This parallel movement toward domestic reform and limited cooperation with the West collapsed under the blows of Japanese imperialism. Defeat in the Sino-Japanese War (1894–1895) and the subsequent harsh peace treaty revealed China's helplessness in the face of aggression, triggering a rush by foreign powers for concessions and protectorates. At the high point of this rush in 1898, it appeared that the European powers might actually divide China among themselves, as they had recently divided Africa. Probably only the jealousy each nation felt toward its imperialist competitors saved China from partition. In any event, the tempo of foreign encroachment greatly accelerated after 1894.

China's precarious position after the war with Japan led to a renewed drive for fundamental reforms. Like the leaders of the Meiji Restoration, some modernizers saw salvation in Western institutions. In 1898 they convinced the young emperor to launch a desperate **hundred days of reform** in an attempt to meet the foreign challenge. More radical reformers, such as the revolutionary Sun Yatsen (1866–1925), who came from the peasantry and was educated in Hawaii by Christian missionaries, sought to overthrow the dynasty altogether and establish a republic.

The efforts at radical reform by the young emperor and his allies threatened the Qing establishment and the empress dowager Tzu Hsi, who had dominated the court for a quarter of a century. In a palace coup, she and her supporters imprisoned the emperor, rejected the reform movement, and put reactionary officials in charge. Hope for reform from above was crushed.

A violent antiforeign reaction swept the country, encouraged by the Qing court and led by a secret society that foreigners called the Boxers. The patriotic Boxers blamed China's ills on foreigners, charging foreign missionaries with undermining reverence for ancestors and thereby threatening the Chinese family and the society as a whole. In the agony of defeat and unwanted reforms, the Boxers and other secret societies struck out at their enemies. In northeastern China, more than two hundred foreign missionaries and several thousand Chinese Christians were killed, prompting threats and demands from Western governments. The empress dowager answered by declaring war on the foreign powers, hoping that the Boxers might help limit European influence and control.

The imperialist response was swift and harsh. After the Boxers besieged the embassy quarter in Beijing,

■ **hundred days of reform** A series of Western-style reforms launched in 1898 by the Chinese government in an attempt to meet the foreign challenge.

foreign governments (including Japan, Britain, France, Germany, and the United States) organized an international force of twenty thousand soldiers to rescue their diplomats and punish China. These troops defeated the Boxers and occupied and plundered Beijing. In 1901 China was forced to accept a long list of penalties, including a heavy financial indemnity payable over forty years.

The years after this heavy defeat were ever more troubled. Anarchy and foreign influence spread as the power and prestige of the Qing Dynasty declined still further. Antiforeign, antigovernment revolutionary groups agitated and plotted. Finally, in 1912 a spontaneous uprising toppled the Qing Dynasty. After thousands of years of emperors, a loose coalition of revolutionaries proclaimed a Western-style republic and called for an elected parliament. The transformation of China under the impact of expanding Western society entered a new phase, and the end was not in sight.

NOTES

1. Quoted in J. W. Hall, *Japan: From Prehistory to Modern Times* (New York: Delacorte Press, 1970), p. 250.
2. Quoted in Earl of Cromer, *Modern Egypt* (London, 1911), p. 48.
3. Quoted in Brooke Hauser, *The New Kids: Big Dreams and Brave Journeys at a High School for Immigrant Teens* (New York: Free Press, 2011), title page.
4. Quoted in W. L. Langer, *European Alliances and Alignments, 1871–1890* (New York: Vintage Books, 1931), p. 290.
5. Quoted in J. Ellis, *The Social History of the Machine Gun* (New York: Pantheon Books, 1975), pp. 86, 101. The numbers given for British casualties at the Battle of Omdurman vary; the total casualties quoted here come from an original British army report. See Lieutenant General H. M. L. Rundle, M.G., Chief of Staff, "Herewith Returns of Killed and Wounded of the Expeditionary Force at the Battle of Khartum, on September 2, 1898," Khartum, September 9, 1898, at North East Medals, http://www.britishmedals.us/kevin/other/lgomdurman.html.
6. Quoted in G. H. Nadel and P. Curtis, eds., *Imperialism and Colonialism* (New York: Macmillan, 1964), p. 94.
7. Quoted in W. L. Langer, *The Diplomacy of Imperialism*, 2d ed. (New York: Alfred A. Knopf, 1951), pp. 86, 88.
8. Quoted in S. Conrad, *Globalisation and the Nation in Imperial Germany* (New York: Cambridge University Press, 2010), p. 78.
9. Quoted in Langer, *The Diplomacy of Imperialism*, p. 88.
10. J. C. Scott, *Weapons of the Weak: Everyday Forms of Peasant Resistance* (New Haven, Conn.: Yale University Press, 1985), p. xvi.
11. Quoted in K. M. Panikkar, *Asia and Western Dominance: A Survey of the Vasco da Gama Epoch of Asian History* (London: George Allen & Unwin, 1959), p. 116.
12. A. Burton, "The White Women's Burden: British Feminists and 'The Indian Women,' 1865–1915," in *Western Women and Imperialism: Complicity and Resistance*, ed. N. Chauduri and M. Strobel (Bloomington: Indiana University Press, 1992), pp. 137–157.

LOOKING BACK LOOKING AHEAD

In the early twentieth century educated Europeans had good reason to believe that they were living in an age of progress. The largest wave of mass migration in human history had spread Europeans and their ideas around the world, even as it relieved social pressures at home. The ongoing triumphs of industry and science and the steady improvements in the standard of living beginning about 1850 were undeniable, and it was generally assumed that these favorable trends would continue. There had also been progress in the political realm. The bitter class conflicts that culminated in the bloody civil strife of 1848 had given way in most European countries to stable nation-states with elected legislative bodies that responded to real problems and enjoyed popular support. Moreover, there had been no general European war since Napoleon's defeat in 1815. Only the brief, limited wars connected with German and Italian unification at midcentury had broken the peace in the European heartland.

In the global arena, peace was much more elusive. In the name of imperialism, Europeans (and North Americans) used war and the threat of war to open markets and punish foreign governments around the world. Although criticized by some intellectuals and leftists such as J. A. Hobson, these foreign campaigns resonated with European citizens and stimulated popular nationalism. Like fans in a sports bar, the peoples of Europe followed their colonial teams and cheered them on to victories that were almost certain. Thus imperialism and nationalism reinforced and strengthened each other in Europe, especially after 1875.

This was a dangerous development. Easy imperialist victories over weak states and poorly armed non-Western peoples encouraged excessive pride and led Europeans to underestimate the fragility of their accomplishments as well as the murderous power of their weaponry. Imperialism also made nationalism more aggressive and militaristic. At the same time that European imperialism was dividing

the world, the leading European states were also dividing themselves into two opposing military alliances. Thus when the two armed camps stumbled into war in 1914, there would be a superabundance of nationalistic fervor, patriotic sacrifice, and cataclysmic destruction.

Make Connections

Think about the larger developments and continuities within and across chapters.

1. How did the expansion of European empires transform everyday life around the world?
2. Historians often use the term *New Imperialism* to describe the globalization of empire that began in the later nineteenth century. Was the New Imperialism really that different from earlier waves of European expansion (Chapters 14 and 17)?
3. In what ways does the global impact of European imperialism in the late nineteenth century continue to shape world relations and conflicts today?

24 REVIEW & EXPLORE

Identify Key Terms

Identify and explain the significance of each item below.

neo-Europes (p. 732)
Opium Wars (p. 733)
gunboat diplomacy (p. 734)
global mass migration (p. 736)
nativism (p. 740)
New Imperialism (p. 741)
Afrikaners (p. 741)
Berlin Conference (p. 743)
South African (Boer) War (p. 744)
Fashoda Incident (p. 746)
white man's burden (p. 750)
Orientalism (p. 750)
Great Rebellion (p. 755)
Meiji Restoration (p. 756)
hundred days of reform (p. 758)

Review the Main Ideas

Answer the section heading questions from the chapter.

1. What were the global consequences of European industrialization? (p. 730)
2. How was massive migration an integral part of Western expansion? (p. 736)
3. How did the New Imperialism change Western colonialism? (p. 741)
4. How did non-Westerners respond to Western expansion? (p. 754)

Suggested Resources

BOOKS

- Bagchi, Amiya Kumar. *Perilous Passage: Mankind and the Global Ascendancy of Capital.* 2005. A spirited radical critique of the "rise of the West."
- Bayley, C. A. *The Birth of the Modern World, 1780–1914.* 2004. A broad survey that puts European imperialism and nationalism in a global context.