

CHAPTER  
**12**

# Transformations Around the Globe, 1800–1914

## PREVIEWING THEMES

### Empire Building

During the 19th and early 20th centuries, many Western nations sought influence over other countries. Great Britain, additional European countries, and the United States tried to dominate various nations both politically and economically.

### Cultural Interaction

Imperialism brought new religions, philosophies, and technological innovations to East Asia and Latin America. Chinese, Japanese, and Latin American people resisted some Western ideas and adapted others.

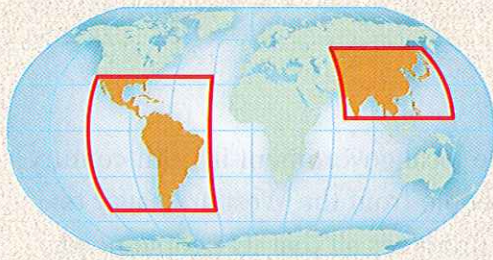
### Revolution

As the world took the first steps toward becoming a global community, political and social unrest were common. Both China and Japan struggled to deal with foreign influence and modernize their governments. Mexicans staged a revolution that brought political and economic reforms.

## A WORLD IN TURMOIL, 1850–1914

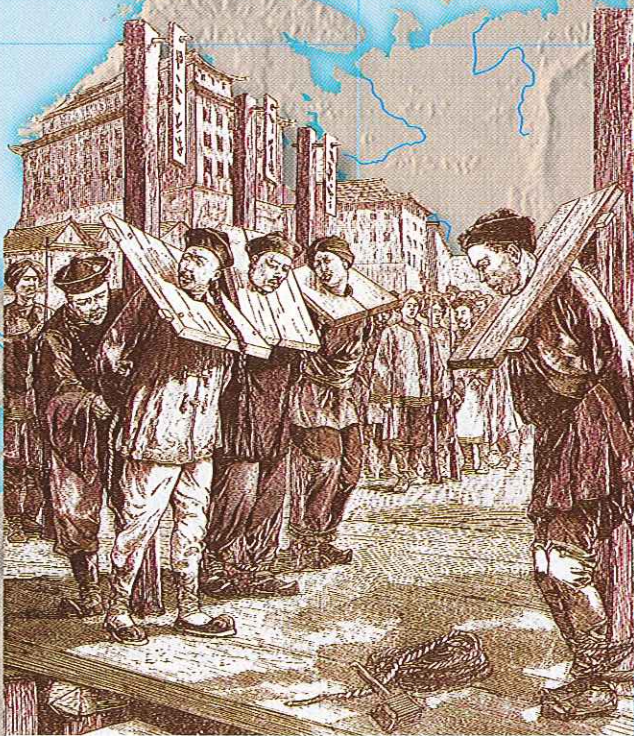


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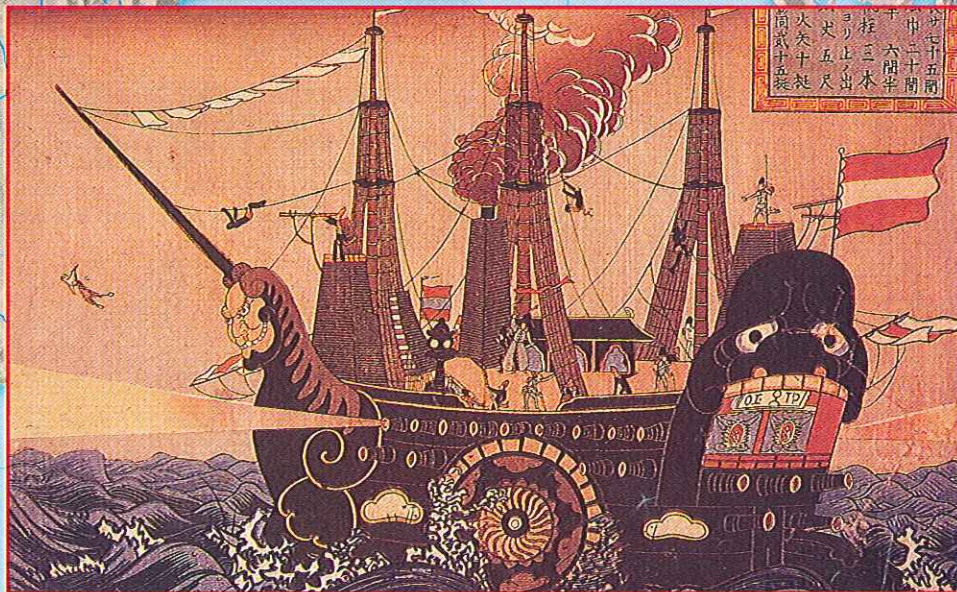


## PREVIEWING THE CHAPTER

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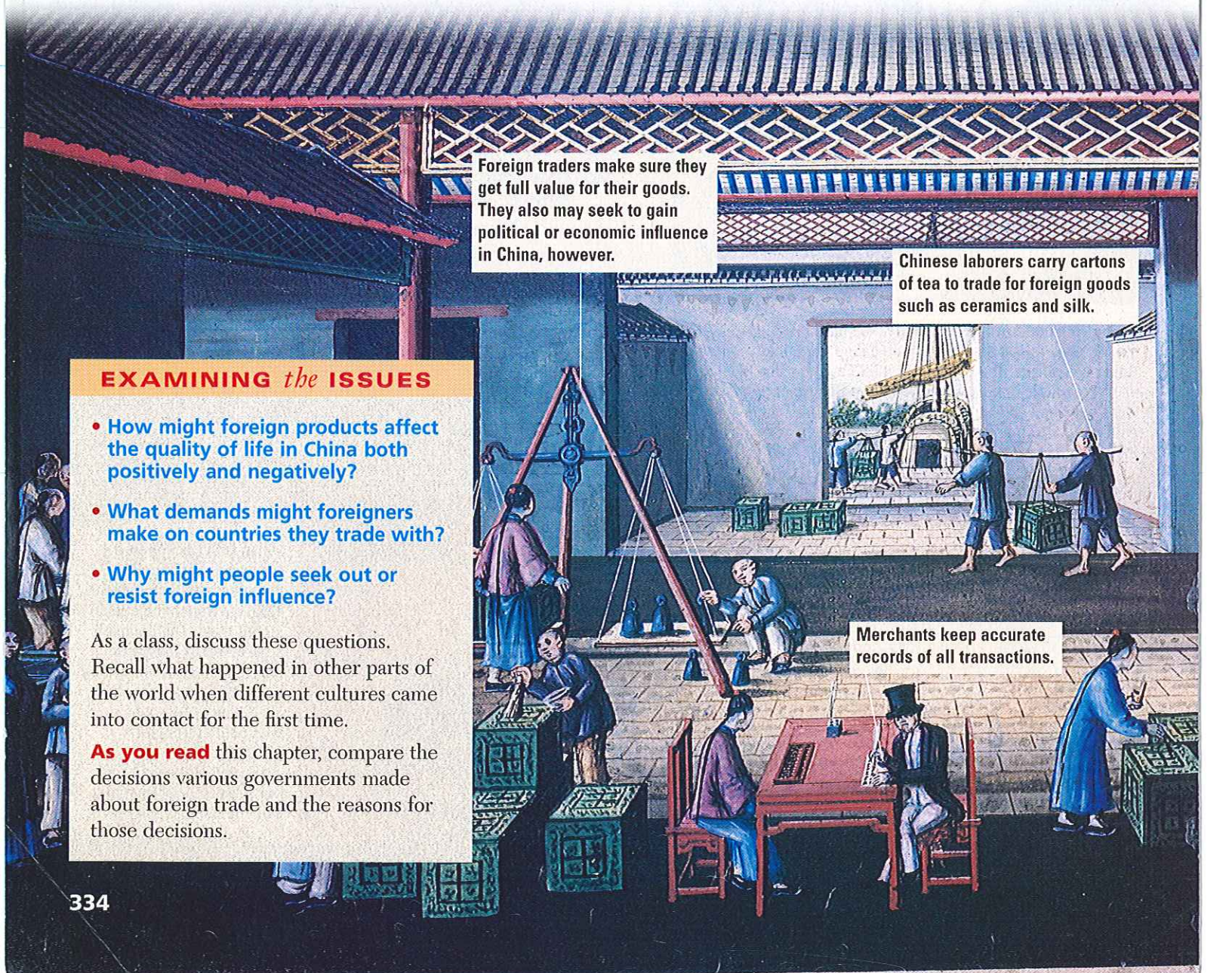
As the 20th century dawned, thousands of Chinese peasants and workers joined an organization called the Society of Harmonious Fists. They protested their country's dealings with foreigners. Popularly known as the **Boxers**, protesters were punished by being made to wear wooden collars in public, as shown here. They could not lie down or reach their mouths while wearing the collars.



When **U.S. Commodore Perry** steamed into Edo Bay in **1853**, the Japanese couldn't ignore them. The belching smoke and exaggerated features of this ship painted by a Japanese artist show his country's fear and mistrust of foreigners. Ironically, Japan quickly realized the necessity of dealing with the West and soon became a rival power.

Life is good for you as a member of the local government in 19th-century China, but it could be even better. People from the West are eager to trade with your country. China, however, produces all that its people need, and government officials discourage contact with foreigners. Many foreign products, such as ceramics, are inferior to Chinese goods. The foreigners, however, do offer items that can improve your life, including rifles, cameras, and small sticks called matches that can be scraped against a rock to start a fire. You are curious about these inventions. But you wonder why the foreigners are so eager to trade with China and what they hope to gain.

## *Would you trade with the foreigners?*



Foreign traders make sure they get full value for their goods. They also may seek to gain political or economic influence in China, however.

Chinese laborers carry cartons of tea to trade for foreign goods such as ceramics and silk.

### EXAMINING *the* ISSUES

- How might foreign products affect the quality of life in China both positively and negatively?
- What demands might foreigners make on countries they trade with?
- Why might people seek out or resist foreign influence?

As a class, discuss these questions. Recall what happened in other parts of the world when different cultures came into contact for the first time.

**As you read** this chapter, compare the decisions various governments made about foreign trade and the reasons for those decisions.

Merchants keep accurate records of all transactions.

# 1 China Responds to Pressure from the West

## TERMS & NAMES

- Opium War
- extraterritorial rights
- Taiping Rebellion
- sphere of influence
- Open Door Policy
- Boxer Rebellion

### MAIN IDEA

Western economic pressure forced China to open to foreign trade and influence.

### WHY IT MATTERS NOW

China has become an increasingly important member of the global community.

**SETTING THE STAGE** In the late 18th century, China had more people than any other empire in the world. Under the Manchus of the Qing Dynasty, the empire was stable and secure. The people lived by traditions that were thousands of years old.

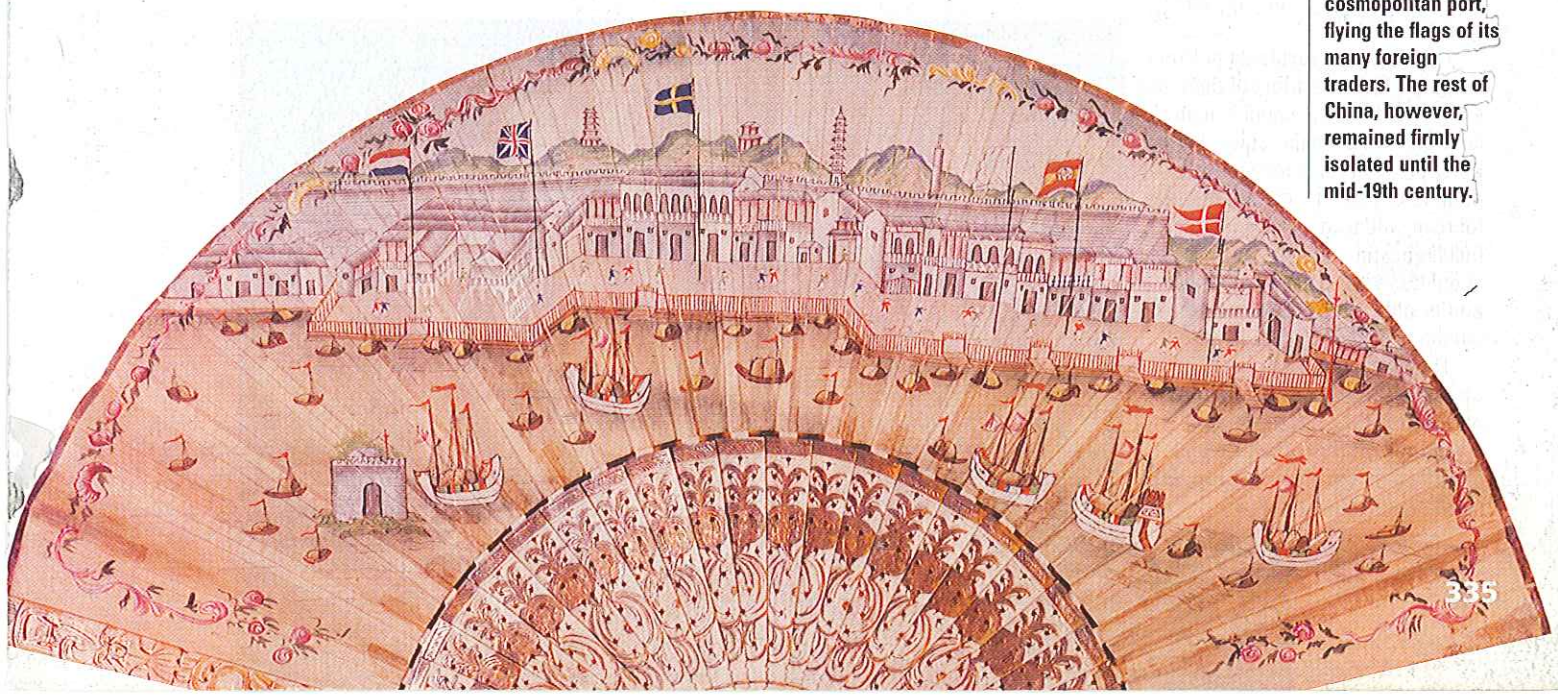
## China Resists Foreign Influence

Out of pride in their ancient culture, the Chinese looked down on all foreigners. In 1793, however, the Qing emperor agreed to receive an ambassador from England. The Englishman brought gifts of the West's most advanced technology—clocks, globes, musical instruments, and even a hot-air balloon. The emperor was not impressed. In a letter to England's King George III, he stated that the Chinese already had everything they needed. They were not interested in the “strange objects” and gadgets that the West was offering them.

**China Remains Self-Sufficient** The basis of Qing China's wealth was its healthy agricultural economy. During the 11th century, China had acquired a quick-growing strain of rice from Southeast Asia. By the time of the Qing Dynasty, the rice was being grown throughout the southern part of the country. Around the same time—the 17th and 18th centuries—Spanish and Portuguese traders brought maize, sweet potatoes, and peanuts from the Americas. These crops helped China increase the productivity of its land and more effectively feed its 300 million people. Better nutrition, in turn, led to a population boom.

China also had extensive mining and manufacturing industries. Rich salt, tin, silver, and iron mines produced great quantities of ore. The mines provided work for tens of thousands of people. The Chinese also produced beautiful silks, high-quality cottons, and fine porcelain. The Chinese people were essentially self-sufficient.

This 18th-century painted fan depicts Guangzhou in southern China as a cosmopolitan port, flying the flags of its many foreign traders. The rest of China, however, remained firmly isolated until the mid-19th century.



**The Tea-Opium Connection** Because of their self-sufficiency, the Chinese had little interest in trading with the West. For decades, the only place they would allow foreigners to do business was at the southern port of Guangzhou (gwahng-joh). And the balance of trade at Guangzhou was clearly in China's favor. This means that China earned much more for its exports than it spent on imports. The British imported millions of pounds of tea from China every year and exported goods worth much less. They made up for the difference in silver. This imbalance drained Britain's silver supply.

European merchants were determined to find a product the Chinese would buy in large quantities. Eventually they found one—opium. Opium is a habit-forming narcotic made from the poppy plant. Chinese doctors had been using it to relieve pain for hundreds of years. In the late 18th century, however, British merchants smuggled opium into China for nonmedical use. It took a few decades for opium smoking to catch on, but by 1835, as many as 12 million Chinese people were addicted to the drug.

**War Breaks Out** This growing supply of opium caused great social, moral, and monetary problems for the country. The Qing emperor was angry. In 1839, one of the emperor's highest advisers wrote a letter to England's Queen Victoria about the problem:

#### A VOICE FROM THE PAST

By what right do they [British merchants] . . . use the poisonous drug [opium] to injure the Chinese people? . . . I have heard that the smoking of opium is very strictly forbidden by your country; that is because the harm caused by opium is clearly understood. Since it is not permitted to do harm to your own country, then even less should you let it be passed on to the harm of other countries.

LIN ZEXU, quoted in *China's Response to the West*

The pleas went unanswered, and Britain refused to stop trading opium. The result was an open clash between the British and the Chinese—the **Opium War** of 1839. The battles took place mostly at sea. China's outdated ships were no match for Britain's steam-powered gunboats and sophisticated cannons. As a result, the Chinese suffered a humiliating defeat. In 1842, they signed a peace treaty, the Treaty of Nanjing.

This treaty gave Britain the island of Hong Kong. After signing another treaty in 1844, U.S. and other foreign citizens also gained **extraterritorial rights**. These rights provided exemption from Chinese law at four Chinese ports besides Guangzhou. Many Chinese greatly resented these privileges and the foreigners among them. And a bustling trade in opium continued.

#### THINK THROUGH HISTORY

**A. Analyzing Issues**  
What conflicting British and Chinese positions led to the Opium War?

### CONNECT to TODAY

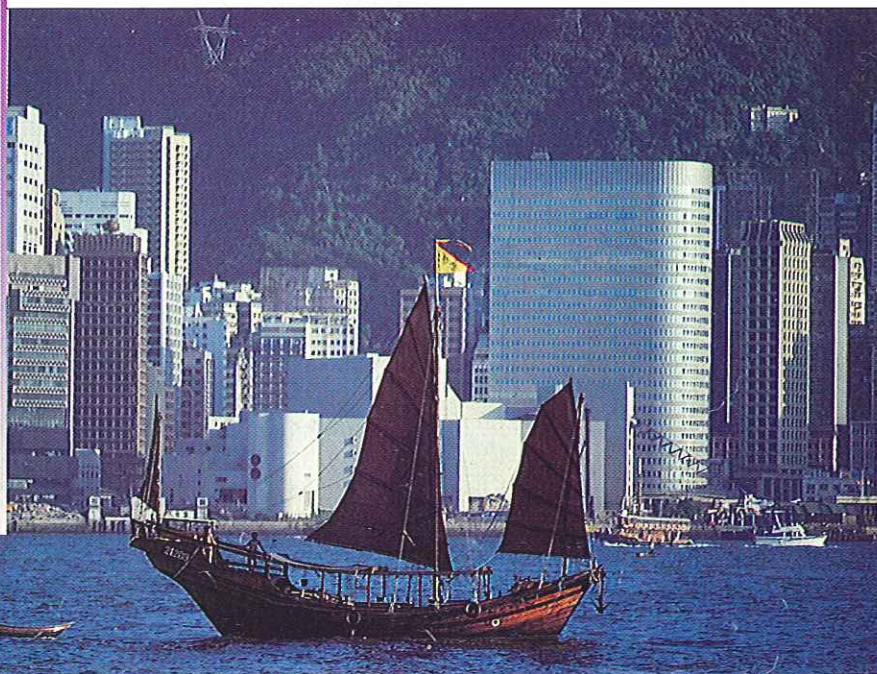
#### Hong Kong

The Treaty of Nanjing gave the island of Hong Kong to the British. After another conflict in 1899, China leased that territory and parts of the mainland to Britain for 99 years. On July 1, 1997, Hong Kong returned to Chinese control.

Although the name *Hong Kong* means "fragrant harbor," this bustling economic center is one of the most crowded places on earth. About 15,000 people occupy each square mile.

Nearly all the residents of Hong Kong are Chinese. Most of them are emigrants from Communist mainland China. The major cities, Hong Kong City and Kowloon, are bustling centers of banking, manufacturing, tourism, and trade. High-rise buildings and gaudy neon signs rub shoulders with open-air markets and traditional shops on the cities' winding, narrow streets.

There has been almost a century of exposure to capitalism and British rule in Hong Kong. Integration of the former colony into Chinese society probably will be difficult for everyone.



## Internal Problems Increase

Foreigners were not the greatest of China's problems in the mid-19th century, however. Its own population provided an overwhelming challenge. That population had grown to 430 million by 1850—a 30-percent gain in only 60 years. Yet food production had barely increased. As a result, hunger was widespread, even in good years. In the frequent bad years, the Huang He (Yellow River) broke through its dikes and flooded vast farming areas. Millions starved.

The Chinese government itself was riddled with corruption and could do little to ease its people's suffering. Dikes that might have held back the river had fallen into disrepair. Public granaries were empty. Talented people who were unable or unwilling to bribe state examiners often were denied government jobs. The people became discouraged, and opium addiction rose steadily. As their problems mounted, the Chinese actively began to rebel against the Qing Dynasty.

**The Taiping Rebellion** The rebellion that was to become China's largest was led by Hong Xiuquan (hung shee-oo-choo-ahn). The Treaty of Nanjing had granted Christian missionaries increased privileges in China. The missionaries greatly influenced this sensitive young man. Hong had mystical visions and wanted to save the world, beginning with China. He dreamed of a "Heavenly Kingdom of Great Peace." In this kingdom, all Chinese people would share China's vast wealth and no one would live in poverty. Hong's revolt was called the **Taiping Rebellion**, from the Chinese expression *taiping*, meaning "great peace."

Beginning in the late 1840s, Hong organized an army made up mainly of peasants—both men and women—from southern China. By 1853, 1 million people had joined his rebel forces. That year, Hong captured the city of Nanjing and declared it his capital. The Taiping government controlled large areas of southeastern China.

Over the next ten years, however, the Qing regained control of the country. Imperial troops, local militias, and British and French forces all fought against the Taiping. By 1864, they crushed the 14-year rebellion. But China paid a terrible price. Huge, hungry armies had destroyed fertile farmland in their search for food. At least 20 million—and possibly twice that many—people died.

## China Wrestles with Reform

The Taiping Rebellion and other smaller uprisings put tremendous internal pressure on the Chinese government. And, despite the Treaty of Nanjing, external pressure from foreign powers was increasing. At the Qing court, stormy debates raged about how best to deal with these pressures. Some government leaders called for reforms patterned on Western ways. Others insisted on honoring Chinese traditions. The Chinese Empire was conservative overall, though. Clinging to traditional ways and resisting change started at the top.

**The Dowager Empress Cixi Resists Change** During the last half of the 19th century, there was only one person at the top in the Qing imperial palace. The Dowager Empress Cixi (tsoo-shee) ruled China, with only one brief gap, from 1861 until 1908.

Although she was committed to traditional values, the Dowager Empress did support certain reforms. In the 1860s, for example, she backed the self-strengthening movement. That program aimed to update China's educational system, diplomatic service,

## HISTORY MAKERS

### Hong Xiuquan 1814–1864

Hong Xiuquan came from a rural family. As a young man, he tried to move up in Chinese society by seeking a government post. However, he kept failing the civil service exam. In his early twenties, Hong had a dream that ordered him to fight evil. From then on, he worked to overthrow the "evil" Qing dynasty and the same Qing system that he had tried so hard to enter. To destroy evil, Hong and his rebel followers destroyed Qing artworks and outlawed such Qing symbols as the pigtail.

Hong slowly developed his own personal vision of Christianity. That vision led him to forbid opium, tobacco, alcohol, and gambling. Under Hong, men and women were treated as equals. Women, for example, could fight for Hong's cause just as men could. However, men and women were divided into separate divisions, and even husbands and wives were not allowed contact.

After winning Nanjing, Hong withdrew into his mystical visions. After years of bloody feuding among his lieutenants, Hong's Taiping government fell. After that defeat, thousands of his followers burned themselves to death rather than surrender to the emperor.

**THINK THROUGH HISTORY**  
**B. Recognizing Effects** What were the results of the Taiping Rebellion?

### Background

The Dowager Empress Cixi first served as ruler for two emperors who took the throne as children. When she gained the throne herself she was known as "dowager," or endowed empress.



## Foreign Influence in China, 1850–1911



### GEOGRAPHY SKILLBUILDER: Interpreting Maps

- Human-Environment Interaction** Which countries had spheres of influence in China?
- Location** What foreign power shown on the map had access to inland China? What geographic feature made this possible?

China's economy. As shown in the map, many of Europe's main political powers and Japan gained a strong foothold in China. This foothold, or **sphere of influence**, was a region in which the foreign nation controlled trade and investment.

The United States was a long-time trading partner with China. Americans worried that other nations would soon divide China into formal colonies and shut out American traders. To prevent this occurrence, in 1899 the United States declared the **Open Door Policy**. This policy proposed that China's "doors" be open to merchants of all nations. Britain and the other European nations agreed. The policy thus protected both American trading rights in China and China's freedom from colonization. But the country was still at the mercy of foreign powers.

## Chinese Nationalism Grows

Humiliated by their loss of power, many Chinese pressed for strong reforms. Among them was China's young emperor, Guangxu (gwahng-shoo). In June 1898, Guangxu's aunt, the Dowager Empress Cixi, was relaxing at the summer palace. Assuming that he had her support, Guangxu introduced measures to modernize China. These measures called for overhauling China's educational system, strengthening the economy, modernizing the military, and streamlining the government. Guangxu asked progressive, creative advisers to help carry out his programs.

Most Qing officials saw these innovations as threats to their power. They reacted with alarm. In September 1899, they called the Dowager Empress back to the imperial court. Guangxu realized too late that he had misjudged her. Striking with the same speed as her nephew, the Dowager Empress Cixi placed him under arrest at the

and military. Under this program, China set up arsenals to manufacture steam-powered gunboats, rifles, and ammunition. By 1875, these ammunition supply and storage facilities were among the largest in the world.

The self-strengthening movement had mixed results, however. The ability to produce its own warships and ammunition was undoubtedly good for China's morale. But the Chinese hired foreigners to run many of its arsenals. These outsiders often didn't feel comfortable working with Chinese resources. So they imported both raw materials and factory machinery from abroad. This practice contributed to both an imbalance in trade for China and a lack of quality control. In addition, the movement lacked support from the Chinese people as a whole.

**Other Nations Step In** China's weak military technology and its economic and political problems were not a secret from the rest of the world. Throughout the late 19th century, many foreign nations took advantage of this weakness and attacked China. Treaty negotiations after each conflict gave the West increasing control over

**THINK THROUGH HISTORY**  
**C. Making Inferences** What importance did spheres of influence have for China and for the nations involved?

palace. She then took back her own power. She reversed his reforms and executed a number of the movement's leaders. Guangxu's Hundred Days of Reform ended without a single long-term change. The Chinese people's frustration with their situation did change, however. It grew.

**The Boxer Rebellion** This widespread frustration finally erupted. Poor peasants and workers particularly resented the special privileges granted to foreigners. They also resented Chinese Christians, who were protected by foreign missionaries. To demonstrate their discontent, they formed a secret organization called the Society of Harmonious Fists. They soon came to be known as the Boxers. Their campaign against the Dowager Empress's rule and foreigner privilege was called the **Boxer Rebellion**.

In the spring of 1900, the Boxers descended on Beijing. Shouting "Death to the foreign devils," the Boxers surrounded the European section of the city. They kept it under siege for several months. The Dowager Empress expressed support for the Boxers but did not back her words with military aid. In August, a multinational force of 20,000 troops marched toward Beijing. Soldiers from Britain, France, Germany, Austria, Italy, Russia, Japan, and the United States quickly defeated the Boxers.

Despite the failure of the Boxer Rebellion, a strong sense of nationalism had emerged in China. The Chinese people realized that their country must resist more foreign intervention. Most important, however, the government must become responsive to their needs.

**The Beginnings of Reform** At this point, even the Qing court realized that China needed to make profound changes to survive. In 1905, the Dowager Empress sent a select group of Chinese officials on a world tour to study the operation of different governments. The group traveled to Japan, the United States, Britain, France, Germany, Russia, and Italy. On its return in the spring of 1906, the officials recommended that China restructure its government. They based their suggestions on the constitutional monarchy of Japan. The empress accepted this recommendation and began making reforms. Although she convened a national assembly within a year, change was slow. In 1908, the court announced that it would establish a full constitutional government by 1917.

Unfortunately, however, the turmoil in China did not end with these progressive steps. Unrest would continue for the next four decades as the Chinese faced internal and external threats. But as wholeheartedly as China had struggled to remain isolated from the outside world, its neighbor Japan responded to Western influence in a much different way.

Boxer rebels like this one drawn by a 20th-century artist were driven by a fierce hatred of foreigners. They used their fists, swords, and guns in an unsuccessful attempt to oust the "foreign devils" from China.



**THINK THROUGH HISTORY**  
**D. Analyzing**  
**Causes** Why did the Boxer Rebellion fail?

## Section 1 Assessment

### 1. TERMS & NAMES

Identify

- Opium War
- extraterritorial rights
- Taiping Rebellion
- sphere of influence
- Open Door Policy
- Boxer Rebellion

### 2. TAKING NOTES

In a flow chart like the one below, list the major events in China's dealings with foreign nations between 1830 and 1900. Include both policies and actual confrontations.



### 3. RECOGNIZING EFFECTS

Do you think the opium trade was finally more harmful or beneficial to China? Explain.

**THINK ABOUT**

- the effects of the Opium War
- other Chinese responses to foreign influence
- the aftermath of the Boxer Rebellion

### 4. THEME ACTIVITY

**Cultural Interaction** Under the long rule of the Dowager Empress Cixi, China fiercely resisted foreign influence. As a class or in a small group, role-play a debate among the Dowager Empress's advisers. Some should argue for continued isolation, and others for openness to foreign influence and trade.



# 2 Japan Modernizes

## TERMS & NAMES

- Treaty of Kanagawa
- Meiji era
- Russo-Japanese War
- annexation

### MAIN IDEA

Japan followed the model of Western powers by industrializing and expanding its foreign influence.

### WHY IT MATTERS NOW

Japan's continued development of its own way of life has made it a leading world power.

**SETTING THE STAGE** In the early 17th century, Japan had shut itself off from almost all contact with other nations. Under the rule of the Tokugawa shoguns, the society was tightly ordered. The shogun parceled out land to the lords. The peasants worked for and lived under the protection of their lord and his samurai. This rigid system kept Japan free of civil war. Peace and relative prosperity reigned for two centuries.

## Daily Life

### Japanese Women

Japan not only restricted its citizens' contact with the outside world but it also severely confined its own women. The supreme duty of a woman was to honor the men in her life. Her restrictive dress and footwear helped ensure that she did not stray far from her place in the home.

As a child, she was expected to be obedient to her father, and as a wife, to her husband. Even as a widow, she was expected to submit to her son or sons.

In Japan today, increasing numbers of women work outside the home, most of them as "office ladies" or "OLs." These secretarial workers have no opportunity to advance, and are arguably no better off than their grandmothers were.

The number of women managers is increasing today, however, and Japanese women are becoming more vocal about playing an active role in their society.



## Japan Ends Its Isolation

The Japanese had almost no contact with the industrialized world during this time of isolation. They continued, however, to trade with China and with Dutch traders from Indonesia. They also had diplomatic contact with Korea. However, trade was growing in importance, both inside and outside Japan.

**Facing the Demand for Foreign Trade** In the early 19th century, Westerners began trying to convince the Japanese to open their ports to trade. British, French, Russian, and American officials occasionally anchored off the Japanese coast. Like China, however, Japan repeatedly refused to receive them. Then, in 1853, U.S. Commodore Matthew Perry took four ships into what is now Tokyo Harbor. The Japanese were astounded by these massive black wooden ships that were powered by steam. They were also shocked by the cannons and rifles. These weapons could have wiped out hundreds of the fiercest samurai in a matter of seconds. The Tokugawa shogun realized he had no choice but to receive the letter Perry had brought from U.S. President Millard Fillmore:

### A VOICE FROM THE PAST

It seems to be wise from time to time to make new laws. . . . If your Imperial Majesty were so far to change the ancient laws as to allow a free trade between the two countries [the U.S. and Japan], it would be extremely beneficial to both. . . . Our steamships, in crossing the great ocean, burn a great deal of coal, and it is not convenient to bring it all the way from America. We wish that our steamships and other vessels should be allowed to stop in Japan and supply themselves with coal, provisions, and water. They will pay for them, in money, or anything else your Imperial Majesty's subjects may prefer.

MILLARD FILLMORE, quoted in *Millard Fillmore Papers*

Polite as President Fillmore's letter was, Perry delivered it with a threat. He would come back with a larger fleet in a year to receive Japan's reply. That reply was the **Treaty of Kanagawa**, which was signed in 1854. Under the terms of the treaty, Japan opened two ports at which American ships could take on supplies. The treaty

**THINK THROUGH HISTORY**

**A. Recognizing Effects** How did the Treaty of Kanagawa affect Japan?

also allowed the United States to set up an embassy in Japan. Once the United States had a foot in Japan's door, other Western powers soon followed. By 1860, Japan, like China, had granted foreigners permission to trade at treaty ports. It had also extended extraterritorial rights to many foreign nations.

**Reform and Modernization Under the Meiji Reign** The Japanese, however, were angry that the shogun had given in to the foreigners' demands. They feared that he was losing control over the country. The people rallied around Japan's young emperor, Mutsuhito (moot-soo-HEE-toh), who appealed to Japan's strong sense of pride and nationalism. In 1867, the Tokugawa shogun stepped down. He thus ended the military dictatorships that had lasted since the 12th century. Mutsuhito established a new government. He chose the name *Meiji* for his reign, which means "enlightened rule." Only 15 when he took over, Mutsuhito reigned for 45 years. This period of Japanese history—from 1867 to 1912—is called the **Meiji era**.

As part of this new enlightenment, the Meiji emperor realized that the best way to oppose Western imperialism was to adopt new ways. The feudal lords, for example, realized that private ownership of land prevented the entire country from benefiting from it. In one of the first acts of the Meiji era, they gave their land to the emperor.

Another way the Meiji government attempted to modernize Japan was by sending its statesmen to Europe and North America to study foreign ways. The Japanese chose what they believed to be the best Western civilization had to offer and adapted it to their own country. They admired Germany's strong centralized government, for example. And they used its constitution as a model for their own. As in Germany, a small group of men held political power in Japan. They were determined to build a mighty nation.

The Japanese also admired the discipline of the German army and the skill of the British navy. They attempted to imitate these European powers as they modernized their military. Japan adopted the American system of universal public education and required that all Japanese children attend school. Their teachers often included foreign experts. Students could go abroad to study as well.

## China and Japan Confront the West



The Dowager Empress Cixi (1862–1908)

### China

- Remains committed to traditional values
- Loses numerous territorial conflicts
- Grants other nations spheres of influence within China
- Finally accepts necessity for reform

### Both

- Have well-established traditional values
- Initially resist change
- Oppose Western imperialism

### Japan

- Considers modernization to be necessary
- Borrows and adapts Western ways
- Strengthens its economic and military power
- Becomes an empire builder



The Meiji Emperor Mutsuhito (1867–1912)

### SKILLBUILDER: Interpreting Charts

1. According to this Venn diagram, in what ways did China and Japan deal differently with Western influence?
2. What similar responses did both countries share despite the different paths they followed?

The emperor also energetically supported following the Western path of industrialization. By the early 20th century, the Japanese economy had become as modern as any in the world. The country built its first railroad line in 1872. The track connected Tokyo, the nation's capital, with the port of Yokohama, 20 miles to the south. By 1914, Japan had more than 7,000 miles of rails. Coal production grew from half a million tons in 1875 to more than 21 million tons in 1913. Meanwhile, large, state-supported companies built thousands of factories. Traditional Japanese industries, such as tea processing and silk production, expanded to give the country unique products to trade. Developing modern industries, such as shipbuilding and weapons production, made Japan competitive with the West.

## Japanese Imperialism Grows

Japan's race to modernize paid off. By 1890, the country had several dozen warships and 500,000 well-trained, well-armed soldiers. It had become the strongest military power in Asia.

Japan had gained military, political, and economic strength. It then sought to eliminate the extraterritorial rights of foreigners. The Japanese foreign minister assured foreigners that they could rely on fair treatment in Japan. This was because its constitution and legal codes were similar to those of European nations, he explained. His reasoning was convincing, and in 1894, Britain and the other foreign powers abolished the extraterritorial rights of their citizens living in Japan. Japan's feeling of strength and equality with the Western nations rose.

As Japan's sense of power grew, the nation also became more imperialistic. Like many European nations, Japan saw empire building as a way of protecting its security and meeting economic needs. As in Europe, national pride also played a large part in this policy. The Japanese were determined to show the world that they were a powerful nation.

**Japan Attacks China** The Japanese first turned their sights to their Asian neighbors. Japan's neighbor, Korea, is not far from southern Japan (see the map on page 718). In 1876, Japan forced Korea to open three ports to Japanese trade. But China also considered Korea to be important as both a trading partner and a military out-

post. Recognizing their similar interests in Korea, Japan and China signed a hands-off agreement. In 1885, both countries pledged that they would not send their armies into Korea.

In June 1894, however, China broke that agreement. Rebellions had broken out against Korea's king. He asked China for military help in putting them down. Chinese troops marched into Korea. Japan protested and sent its troops to Korea to fight the Chinese. The Sino-Japanese War had begun. Within a few months, Japan had driven the Chinese out of Korea, had destroyed the Chinese navy, and had begun taking over Manchuria. In 1895, China and Japan signed a peace treaty. This treaty gave Japan its first colonies—Taiwan and the Pescadores Islands.

**Russo-Japanese War** Most Western nations had expected China to win the showdown with Japan fairly easily. The Japanese victory surprised them. It also changed the world's balance of power. Russia and Japan emerged as the major powers—and enemies—in East Asia.

Russia and Japan soon went to war over Manchuria. This was a region north of Korea that was under Chinese rule. In 1903, Japan offered to recognize Russia's rights in Manchuria if the Russians would agree to stay out of Korea. But the Russians refused. So, in February 1904, Japan launched a surprise attack. It struck at the

### THINK THROUGH HISTORY

**B. Making Inferences** Why did Japan become imperialistic?

### Vocabulary

**Sino:** a prefix meaning "Chinese."

### Background

Russia began expanding into Asia in the 1580s. It became a world power in the late 1700s under Catherine the Great.

## GlobalImpact

### Changing Image of the East

The Japanese victory over the Russians in 1905 exploded a strong Western myth. Many Westerners believed that white people were a superior race. The overwhelming success of European colonialism and imperialism in the Americas, Africa, and Asia had reinforced this belief. But the Japanese had shown Europeans that people of other races were their equals in modern warfare.

Unfortunately, Japan's military victory led to a different form of Western racism. Influenced by the ideas of Germany's emperor Wilhelm II, the West imagined the Japanese uniting with the Chinese and conquering Europe. The resulting racist Western fear of what it called the "yellow peril" influenced world politics for many decades.

Russian navy, which was anchored off the coast of Manchuria. In the resulting **Russo-Japanese War**, Japan drove Russian troops out of Korea. Japan won brutal land battles and captured most of Russia's Pacific fleet. It also destroyed Russia's Baltic fleet, which had sailed all the way around Africa to participate in the war.

In 1905, Japan and Russia began peace negotiations. U.S. president Theodore Roosevelt helped draft the treaty, which the two nations signed on a ship off Portsmouth, New Hampshire. This agreement, the Treaty of Portsmouth, gave Japan the captured territories. It also forced Russia to withdraw from Manchuria and to stay out of Korea.

**Korea Under Japanese Occupation** After defeating Russia, Japan attacked Korea with a vengeance. In 1905, it made Korea a protectorate. Japan sent in "advisers," who grabbed more and more power from the Korean government. The Korean king was unable to rally international support for his regime. In 1907, he gave up control of the country. Within two years the Korean Imperial Army was disbanded. In 1910, Japan officially imposed **annexation** in Korea, or brought that country under Japan's control.

The Japanese were harsh rulers. For the next 35 years, they forbade public protest. They shut down Korean newspapers and took over Korean schools. There they replaced the study of Korean language and history with that of Japan. They took land away from Korean farmers and gave it to Japanese settlers. They encouraged Japanese businessmen to start industries in Korea, but forbade Koreans from going into business in their own country. Resentment of the Japanese led to nonviolent protests and to a growing Korean nationalist movement. The Japanese did modernize Korean factories and transportation and communications systems, however. Despite this technological progress, Japan's repressive rule in Korea was an example of imperialism at its worst.

The rest of the world clearly saw the brutal results of Japan's imperialism in Korea. Nevertheless, the United States and other European countries moved ahead with their own imperialistic aims, as you will learn in Section 3.

**Vocabulary**

**protectorate:** a country under the partial control and protection of another nation.

**THINK THROUGH HISTORY**

**C. Clarifying** How did Japan treat the Koreans after it annexed the country?



**SKILLBUILDER: Interpreting Political Cartoons**

1. In this cartoon of the Russo-Japanese War, which animal represents Russia and which represents Japan?
2. Whom do you think the Japanese and the Russians are crushing?

**Section 2 Assessment**

**1. TERMS & NAMES**

Identify

- Treaty of Kanagawa
- Meiji era
- Russo-Japanese War
- annexation

**2. TAKING NOTES**

In a chart like the one below, list the steps that Japan took toward modernization and the events that contributed to its growth as an imperialistic power.

Modernization	Imperialism

Do you think that Japan could have become an imperialistic power if it had not modernized? Why or why not?

**3. FORMING AN OPINION**

In your view, was Japan's aggressive imperialism justified? Support your answer with examples from the text.

**THINK ABOUT**

- reasons for Japan's early isolation
- what Japan could gain from imperialism
- Japan's treatment of conquered peoples

**4. ANALYZING THEMES**

**Empire Building** What influences do you think were most important in provoking Japan to build its empire?

**THINK ABOUT**

- Japan's size and geographical features
- Japan's relations with China and Russia
- the interest of countries such as Britain and the United States in Japan

# U.S. Economic Imperialism in Latin America

## TERMS & NAMES

- caudillo
- Monroe Doctrine
- José Martí
- Spanish-American War
- Panama Canal
- Roosevelt Corollary

### MAIN IDEA

The United States put increasing economic and political pressure on Latin America during the 19th century.

### WHY IT MATTERS NOW

This policy set the stage for 20th-century relations between Latin America and the United States.

**SETTING THE STAGE** Latin America's long struggle to gain independence from colonial domination between the late 18th and the mid-19th centuries left the new nations in shambles. Weeds choked off farm fields. Cities and towns collapsed. The new nations faced a struggle for recovery as difficult as their struggle for independence had been.

## Latin America After Independence

Political independence meant little for most citizens of the new Latin American nations. The majority remained poor, illiterate laborers caught up in a cycle of poverty.

**Colonial Legacy** During colonial times, most Latin Americans worked for large landowners. The employers paid their workers with vouchers that could be used only at their own supply stores. Since wages were low and prices were high, workers went into debt. Their debt accumulated and passed from one generation to the next. These “free” workers were almost like slaves in a system known as peonage.

The landowners, on the other hand, only got wealthier after independence. Many new Latin American governments took over the lands owned by native peoples and by the Catholic Church. They then put those lands up for sale. Wealthy landowners were the only people able to afford to buy them, and they snapped them up. But as one Argentinean newspaper reported, “Their greed for land does not equal their ability to use it intelligently.” The unequal distribution of land and its poor use combined to prevent social and economic development in Latin America.

**Political Instability** Political instability also was a widespread problem in 19th-century Latin America. Many Latin American army leaders had gained fame and power during their long struggle for independence. They often continued to assert their power. They controlled the new nations as dictators, or **caudillos**. By 1830, nearly all the countries of Latin America were ruled by caudillos. One typical caudillo was Juan Vicente Gómez. He was a ruthless man who ruled Venezuela for nearly 30 years after seizing power in 1908. “All Venezuela is my cattle ranch,” he once boasted.

There were some exceptions, however. Reform-minded presidents, such as Argentina's Domingo Sarmiento, made strong commitments to improving education. During Sarmiento's presidency, between 1868 and 1874, the number of students in Argentina doubled. But such reformers usually didn't stay in office long. Eventually a caudillo would return to power, forcing the reformer out at the point of a bayonet or gun.

The caudillos found little opposition. The upper classes usually supported them because they opposed giving power to the lower classes. In addition, Latin Americans had gained little experience with democracy under European colonial rule. So the dictatorship of a caudillo did not seem unusual to them. But even when caudillos

The land—and its rich resources—was and is Latin America's major asset. The peasants worked all of their lives in the fields and remained poor and propertyless, as many still are today.



## Latin America, 1830

**Cacao**—was used as a medium of exchange as well as a beverage by the Maya and Aztec.

**Bananas**—have been a staple food in the New World since the 1500s.

**Coffee**—plant is a source of cattle feed, alcohol, and fuel oil, as well as a beverage.

**Cotton**—is used throughout the world as a source of clothing in temperate climates.

**Nitrates**—disputes over ownership of these deposits led to war between Chile, Bolivia, and Peru in the late 1800s.

**Sugar cane**—plant is a source of cattle feed, rum, paper, and wallboard, as well as a sweetener.

**Wool**—the Latin American highlands offer ideal conditions for breeding sheep for their wool.

### Natural Resources

-  Bananas
-  Cacao
-  Cattle
-  Coffee
-  Corn
-  Cotton
-  Gold
-  Nitrates
-  Silver
-  Sugar cane
-  Wheat
-  Wool

1825 Year of independence



### GEOGRAPHY SKILLBUILDER: Interpreting Maps

- Region** Which Latin American countries remained under colonial rule in 1830?
- Human-Environment Interaction** Which country had the most different types of natural resources?

**THINK THROUGH HISTORY**  
**A. Identifying Problems** What difficulties did lower-class Latin Americans continue to face after independence?

weren't in power, most Latin Americans still lacked a voice in the government. Voting rights—and so, political power—were restricted to the relatively few members of the upper and middle classes who owned property or could read.

## Economies Grow Under Foreign Influence

When colonial rule ended in Latin America in the early 1800s, the new nations were no longer restricted to trading with colonial powers. Britain and, later, the United States became Latin America's main trading partners.

**Old Products and New Markets** No matter with whom the new Latin American nations were trading, their economies continued to depend on exports. As during the colonial era, each country concentrated on one or two products. With advances in technology, however, Latin America's exports grew. The development of the steamship and the building of railroads in the 19th century, for example, greatly increased Latin American trade. Toward the end of the century, the invention of refrigeration helped increase Latin America's exports. The sale of beef, fruits and vegetables, and other perishable goods soared.

But foreign nations benefited far more from the increased trade than Latin America did. In exchange for their exports, Latin Americans imported European and North American manufactured goods. They therefore had little reason to develop their own manufacturing industries. And as long as Latin America remained unindustrialized, it could not play a leading role on the world stage.

**Outside Investment and Interference** Furthermore, Latin American countries used little of their export income to build roads, schools, or hospitals. Nor did they

fund programs that would help them be self-sufficient. Instead, they often borrowed money—at high interest rates—to develop facilities for their export industries. Countries such as Britain, France, the United States, and Germany were willing lenders. The Latin American countries often were unable to pay back their loans, however. In response, foreign lenders either threatened to collect the debt by force or to take over the facility it had funded. Foreigners thus gained control of many industries in Latin America. Thus began a new age of economic colonialism.

## The United States and Latin America

Long before the United States had a real economic interest in Latin America, it was aware that its security depended on that of its southern neighbors.

**The Monroe Doctrine** Most of the Latin American colonies had gained their independence by the early 1800s. But their position was not secure. Many Latin Americans feared that European countries would try to reconquer the new republics. The United States, a young nation itself, feared this too. In 1823, therefore, President James Monroe issued what came to be called the **Monroe Doctrine**. This document stated that “the American continents . . . are henceforth not to be considered as subjects for future colonization by any European powers.” Britain was Latin America’s

largest trading partner. It agreed to back the Monroe Doctrine with its powerful navy. Until 1898, though, the United States did little to enforce the Monroe Doctrine. Cuba provided a real testing ground.

**Cuba Declares Independence** Cuba was one of Spain’s last colonies in the Americas. In 1868, Cuba declared its independence and fought a ten-year war against Spain. In 1878, with the island in ruins, the Cubans gave up the fight.

But some Cubans continued to seek independence. In 1895, **José Martí**, a writer who had been exiled, returned to fight for Cuban independence. Martí was killed early in the war, but the Cubans battled on.

By that time, the United States had developed substantial business holdings in Cuba. Therefore it had an economic stake in the fate of the country. In addition, the Spanish had forced many Cuban civilians into concentration camps. Americans objected to the Spanish brutality. In 1898, the United States joined the Cuban war for independence. This conflict, which came to be known as the **Spanish-American War**, lasted about four months. Years of fighting had exhausted the Spanish soldiers, and they gave up easily.

In 1901, Cuba became an independent nation, at least in name. But the Cubans resented U.S. intervention, the military government the United States had installed, and its preventing Cuba from becoming truly independent. The split that began to develop between the United States and Cuba continues to keep those close neighbors miles apart a century later.

After its defeat in the Spanish-American War, Spain turned over the last of its colonies. Puerto Rico, Guam, and the Philippines became U.S. territories. Having become the dominant imperial power in Latin America, the United States next set its sights on Panama.

**The Panama Canal Connects the Oceans** Latin Americans were beginning to regard the United States as the political and economic “Colossus of the North.” It was also a huge country geographically. By the 1870s, the transcontinental railroad connected its east and west coasts. Land travel was long and difficult, however. And sea travel involved a trip around the tip of South America. This was a

### HISTORY MAKER



**José Martí**  
1853–1895

José Martí was only 15 in 1868 when he first began speaking out for Cuban independence. In 1871, the Spanish colonial government punished Martí’s open opposition with exile to Spain.

With only a brief return to his homeland in 1878, Martí remained in exile for about 20 years. He lived most of his life in New York City. There he continued his career as a writer and a revolutionary. “Life on earth is a hand-to-hand combat . . . between the law of love and the law of hate,” he proclaimed.

While in New York, Martí helped raise an army to fight for Cuban independence. He died on the battlefield only a month after the war began. But Martí’s cry for freedom echoes in his essays and poems and in folk songs that are still sung throughout the world.

### THINK THROUGH HISTORY

**B. Analyzing Motives** Why did the United States join the Cuban war for independence?

journey of about 13,000 miles. If a canal could be dug across a narrow section of Central America, the coast-to-coast journey would be cut in half. The United States had been thinking about such a project since the early 19th century. In the 1880s, a French company tried—but failed—to build a canal across Panama.

Despite the French failure, Americans remained enthusiastic about the canal. And no one was more enthusiastic than President Theodore Roosevelt, who led the nation from 1901 to 1909. In 1903, Panama was a province of Colombia. Roosevelt offered that country \$10 million plus a yearly payment for the right to build a canal. When the Colombian government demanded more money, the United States responded by encouraging a revolution in Panama. The Panamanians had been trying to break away from Colombia for almost a century. In 1903, with help from the U.S. navy, they won their country's independence. In gratitude, Panama gave the United States a ten-mile-wide zone in which to build a canal.

For the next ten years, American engineers battled floods, heat, and disease-carrying insects to build the massive waterway. The United States began a campaign to destroy the mosquitoes that carried yellow fever and malaria, and the rats that carried bubonic plague. The effort to control these diseases was eventually successful. But thousands of workers died during construction of the canal. The **Panama Canal** finally opened in 1914. Ships from both hemispheres soon began to use it. Latin America had become a crossroads of world trade. And the United States controlled the tollgate.

### THINK THROUGH HISTORY

#### C. Making

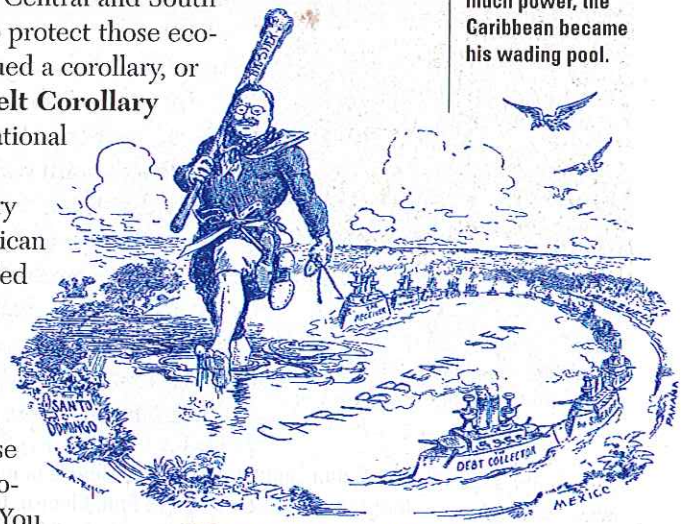
**Inferences** Why was the United States so interested in building the Panama Canal?

**Roosevelt Corollary** The building of the Panama Canal was only one way that the United States expanded its influence in Latin America in the early 20th century. Its presence in Cuba and large investments in many Central and South American countries strengthened its foothold. To protect those economic interests, in 1904, President Roosevelt issued a corollary, or extension, to the Monroe Doctrine. The **Roosevelt Corollary** gave the United States the right to be “an international police power” in the Western Hemisphere.

The United States used the Roosevelt Corollary many times in the following years to justify American intervention in Latin America. The troops occupied some countries for decades. Many Latin Americans protested this intervention by the United States. But they were powerless to stop their giant neighbor to the north.

The U.S. government turned a deaf ear to these protests. It could not ignore the rumblings of revolution just over its border with Mexico, however. You will learn about this revolution in Section 4.

In the view of this political cartoonist, the Roosevelt Corollary gave the U.S. president so much power, the Caribbean became his wading pool.



THE BIG STICK IN THE CARIBBEAN SEA  
From the Herald (New York)

## Section 3 Assessment

### 1. TERMS & NAMES

Identify

- caudillo
- Monroe Doctrine
- José Martí
- Spanish-American War
- Panama Canal
- Roosevelt Corollary

### 2. TAKING NOTES

Using a time line like the one below, list the major events of U.S. involvement in Latin America.



Which event do you think was most beneficial to Latin America? Why?

### 3. FORMING OPINIONS

Do you think that U.S. imperialism was more beneficial or harmful to Latin American people? Explain.

#### THINK ABOUT

- the benefits provided by U.S.-owned companies
- the harmful effects of foreign economic and political influence

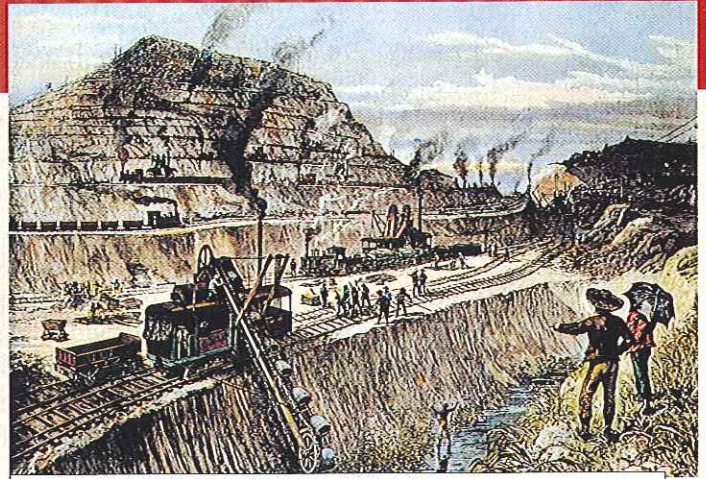
### 4. THEME ACTIVITY

**Revolution** It is 1898 and you have been fighting for the independence of your country, Cuba, for three years. The United States has just joined the war against Spain. Design a political poster that shows your feelings about U.S. participation in this war.

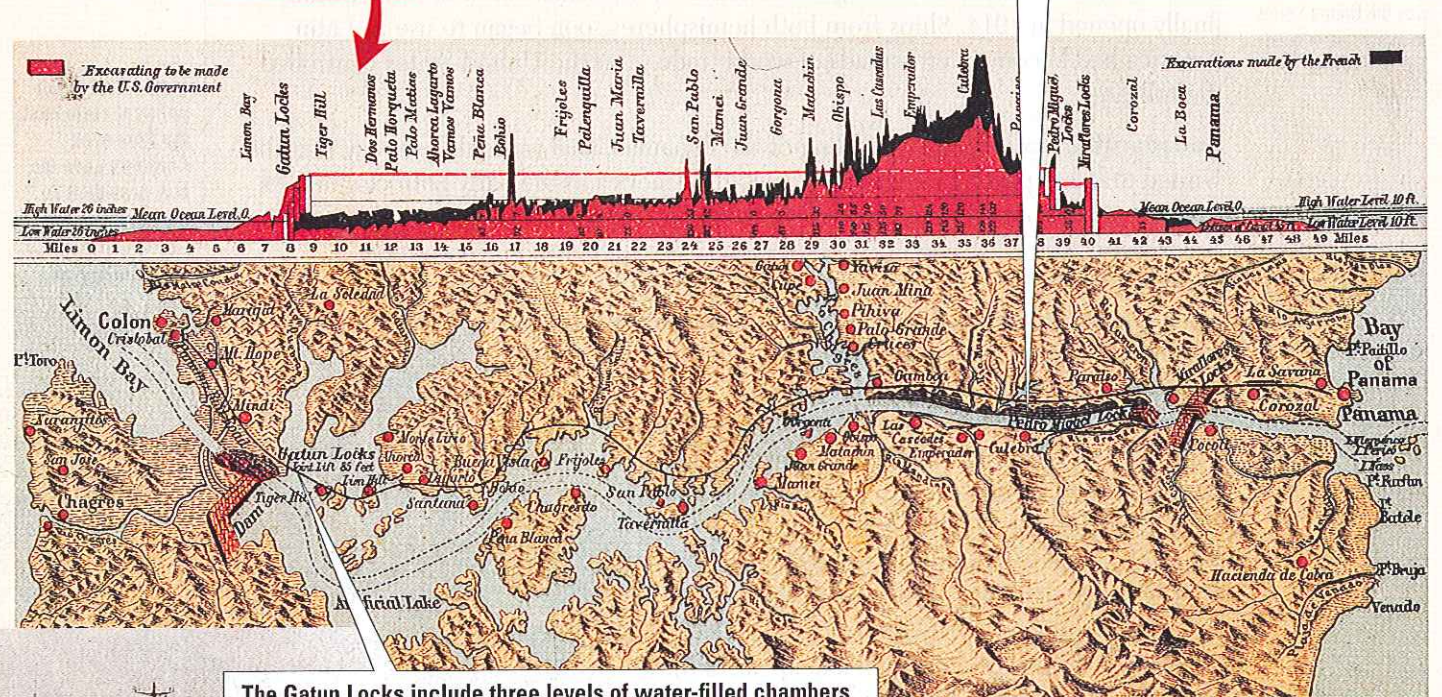


# Panama Canal

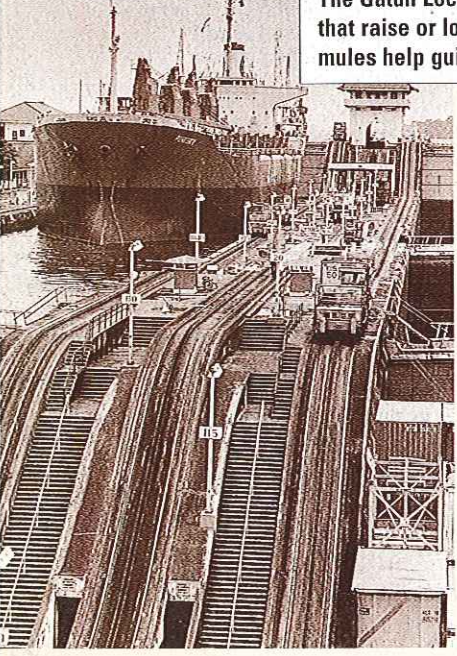
The Panama Canal is considered one of the world's greatest engineering accomplishments. Its completion changed the course of history by opening a worldwide trade route between the Atlantic and Pacific oceans. As shown in the 1914 map below, ships are raised and lowered a total of 170 feet during the 51-mile trip through the canal. It usually takes 15 to 20 hours.



This 1910 engraving shows the excavation of the Gaillard, or Culebra, Cut, at the narrowest part of the canal. Completion of this nine-mile cut took seven years because of frequent landslides. By the time the entire canal was finished, workers had dug up about 211 million cubic yards of earth.



The Gatun Locks include three levels of water-filled chambers that raise or lower ships 85 feet. Electric locomotives called mules help guide ships through the locks.



### Canal Facts

- The canal took ten years to build (1904–1914) and cost \$380 million.
- Thousands of workers died from diseases while building it.
- The trip from San Francisco to New York City via the Panama Canal is about 7,800 miles shorter than the trip around South America.
- The canal now handles more than 13,000 ships a year from around 70 nations carrying 168 million short tons of cargo.
- The United States collected about \$340 million a year in tolls.
- Panama took control of the canal on December 31, 1999.

### Connect to History

**Identifying Problems** What difficulties did workers face in constructing the canal?

SEE SKILLBUILDER HANDBOOK, PAGE 651

### Connect to Today

**Evaluating Decisions** In the more than 80 years since it was built, do you think that the benefits of the Panama Canal to world trade have outweighed the costs in time, money, and human life? Explain your answer.

# The Mexican Revolution

## TERMS & NAMES

- Antonio López de Santa Anna
- Benito Juárez
- *La Reforma*
- Porfirio Díaz
- Francisco Madero
- Francisco “Pancho” Villa
- Emiliano Zapata

### MAIN IDEA

Political, economic, and social inequalities in Mexico triggered a period of revolution and reform.

### WHY IT MATTERS NOW

Mexico has moved toward political democracy and is a strong economic force in the Americas.

**SETTING THE STAGE** The legacy of Spanish colonialism and long-term political instability that plagued the newly emerging Latin American nations in the 19th century caused problems for Mexico as well. Only Mexico, however, shared a border with the United States. The “Colossus of the North” wanted to extend its territory to the Pacific Ocean. But most of the lands in the American Southwest belonged to Mexico.

## Santa Anna and the Mexican War

During the early 19th century, no one dominated Mexican political life more than **Antonio López de Santa Anna**. Santa Anna played a leading role in Mexico’s fight for independence from Spain in 1821. In 1829, he fought against Spain again, as it tried to reconquer Mexico. In 1833, Santa Anna became Mexico’s president.

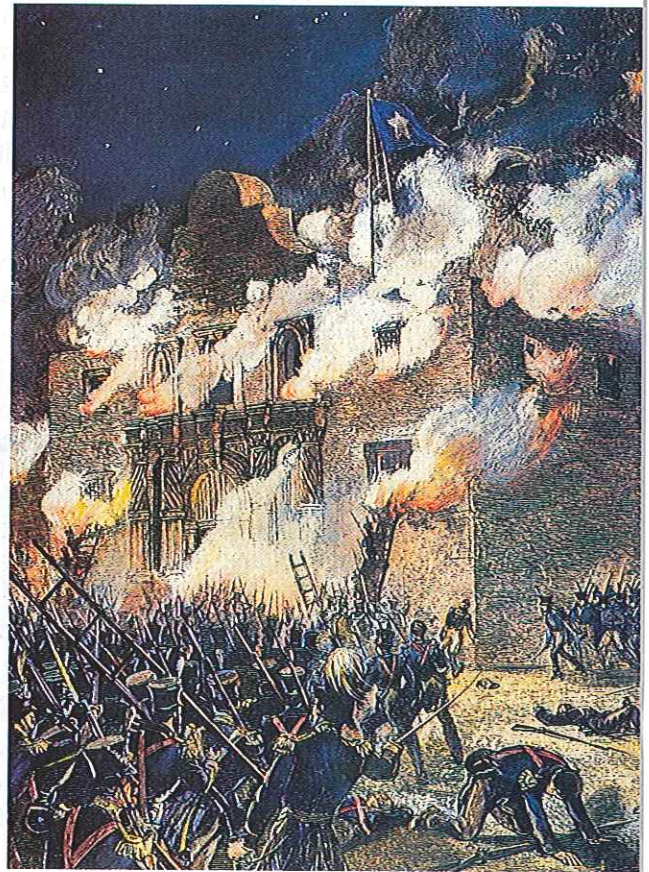
One of Latin America’s most powerful caudillos, Santa Anna was a clever politician. He would support a measure one year and oppose it the next if he thought that would keep him in power. His policy apparently worked. Between 1833 and 1855, Santa Anna was Mexico’s president four times. He gave up the presidency twice, however, to serve Mexico in a more urgent cause—retaining the territory of Texas.

**The Texas Revolt** In the 1820s, Mexico encouraged American citizens to move to the Mexican territory of Texas to help populate the country. Thousands of English-speaking colonists, or Anglos, did. In return for inexpensive land, they pledged to follow the laws of Mexico. As the Anglo population grew, though, tensions developed between the colonists and Mexico over several issues, including slavery and religion. As a result, many Texas colonists wanted greater self-government. But when Mexico refused to grant this, Stephen Austin encouraged a revolt against Mexico in 1835.

Santa Anna led Mexican forces north to try to hold the rebellious territory. He won a few early battles, including a bitter fight at the Alamo. However, he was unsuccessful at the Battle of San Jacinto. His troops were defeated, and he was captured. Sam Houston released Santa Anna after he promised to respect the independence of Texas. When he returned to Mexico in 1836, Santa Anna was quickly ousted from power.

**War and the Fall of Santa Anna** Santa Anna regained power, though, and fought against the United States again. In 1845, the United States annexed Texas.

Mexicans and Americans fought in a blazing, bloody battle at the Alamo, from February 23 to March 6, 1836. Santa Anna’s forces had one of their few victories in the attempt to hold the Texas territory.



Outraged Mexicans considered this a U.S. act of aggression. In a dispute over the border, the United States invaded Mexico. Santa Anna's army fought valiantly. But U.S. troops defeated them after two years of war. In 1848, the two nations signed the Treaty of Guadalupe Hidalgo. The United States received the northern third of what was then Mexico, including California and the American Southwest. Santa Anna went into exile. He returned as dictator one final time, however, in 1853. After his final fall, in 1855, he remained in exile for almost 20 years. When he returned to Mexico in 1874, he was poor, blind, powerless, and essentially forgotten.

## Juárez and *La Reforma*

During the mid-19th century, as Santa Anna's power rose and fell, a liberal reformer, **Benito Juárez**, strongly influenced the politics of Mexico. Juárez was Santa Anna's complete opposite in background as well as in goals. Santa Anna came from a well-off Creole family. Juárez was a poor, orphaned Zapotec Indian. While Santa Anna put his own personal power first, Juárez worked primarily to serve his country.

**Benito Juárez Rises to Power** Ancestry and racial background were important elements of political power and economic success in 19th-century Mexico. For that reason, the rise of Benito Juárez was clearly due to his personal leadership qualities. Juárez was raised on a small farm in the Mexican state of Oaxaca. When he was 12, he moved to the city of Oaxaca. He started going to school at age 15, and in 1829, he entered a newly opened state-run university. He received his law degree in 1831.

He then returned to the city of Oaxaca, where he opened a law office. Most of his clients were poor people who could not otherwise have afforded legal assistance. Juárez gained a reputation for honesty, integrity, hard work, and good judgment. He was elected to the city legislature and then rose steadily in power. Beginning in 1847, he served as governor of the state of Oaxaca.

**Juárez Works for Reform** Throughout the late 1840s and early 1850s, Juárez worked to start a liberal reform movement. He called this movement *La Reforma*. Redistribution of land, separation of church and state, and increased educational opportunities were among its goals. In 1853, however, Santa Anna returned to power for the last time. He sent Juárez and other liberals into exile.

Just two years later, rebellion against Santa Anna brought down his government. Benito Juárez and other liberal leaders returned to Mexico to deal with their country's tremendous problems. As in other Latin American nations, rich landowners kept most other Mexicans in a cycle of debt and poverty. Liberal leader Ponciano Arriaga described how these circumstances led to great problems for both poor farmers and the government:

### A VOICE FROM THE PAST

There are Mexican landowners who occupy . . . an extent of land greater than the areas of some of our sovereign states, greater even than that of one of several European states. In this vast area, much of which lies idle, deserted, abandoned . . . live four or five million Mexicans who know no other industry than agriculture, yet are without land or the means to work it, and who cannot emigrate in the hope of bettering their fortunes. . . . How can a hungry, naked, miserable people practice popular government? How can we proclaim the equal rights of men and leave the majority of the nation in [this condition]?

PONCIANO ARRIAGA, speech to the Constitutional Convention, 1856–1857

**The French Invade Mexico** Not surprisingly, Arriaga's ideas and those of the other liberals in government threatened most conservative upper-class Mexicans. To express their dissatisfaction, these conservative rebels fought against the liberal government. The civil war lasted for three years before the government defeated the rebels. Juárez took over the presidency in 1858. He was officially elected president in 1861.

### THINK THROUGH HISTORY

**A. Contrasting** In what ways did Benito Juárez differ from Santa Anna?

### THINK THROUGH HISTORY

**B. Identifying Problems** What does Ponciano Arriaga think is Mexico's greatest problem?

The end of the civil war did not end Mexico's troubles, though. The country was deeply in debt. Exiled conservatives plotted with some Europeans to reconquer Mexico. In 1862, France was ruled by Napoleon III, who sent a large army to Mexico. Within 18 months, France had taken over the country. Napoleon appointed Austrian archduke Maximilian to rule Mexico as emperor. Juárez and other Mexicans fought against French rule. After five years under siege, the French decided that the struggle was too costly. They ordered the army to withdraw from Mexico in 1867. Maximilian was captured and executed.

Juárez was reelected Mexico's president in 1867. He returned to the reforms he had proposed more than ten years earlier. He began rebuilding the country, which had been shattered during decades of war. He promoted trade with foreign countries, the opening of new roads, the building of railroads, and the establishment of a telegraph service. He set up a national education system, separate from that run by the Catholic Church. In 1872, Juárez died of a heart attack. But after half a century of civil strife and chaos, he left his country a legacy of relative peace, progress, and reform.

## HISTORY THROUGH ART: Political Art

A century after Mexico's long struggle for independence, artist José Clemente Orozco made many paintings dealing with the burdens that prevent people from being free, happy, and creative. Here he depicts the starving, suffering masses protesting their oppression by those in power (*right*). Benito Juárez emerges as a product of and symbol of hope for his people (*below*).



Fresco detail at University of Guadalajara (1936–1939), José Clemente Orozco



Fresco detail at Hospicio Cabañas (1948), José Clemente Orozco

### Connect to History

**Making Inferences** What conclusions can you draw about Orozco's feeling for his people from these two murals?

SEE SKILLBUILDER HANDBOOK, PAGE 663

### Connect to Today

**Comparing** What modern countries or peoples face problems similar to those of the 19th-century Mexico that Orozco portrayed?

## Porfirio Díaz and "Order and Progress"

Juárez's era of reform didn't last long, however. In the mid-1870s, a new caudillo, **Porfirio Díaz**, came to power. Like Juárez, Díaz was an Indian from Oaxaca. He rose through the army and became a noted general in the fight against the French. In 1876, Díaz took control of Mexico by ousting the president. He had the support of the military, whose power had been reduced during and after the Juárez years. Indians and small landholders also supported him, because they thought he would work for land reforms.

During the Díaz years, elections became meaningless. Díaz offered land, power, or political favors to anyone who supported him. He terrorized many who didn't support him, ordering them to be beaten or put in jail. As a political slogan, Díaz adapted a rallying cry from the Juárez era. Juárez's "Liberty, Order, and Progress" became merely "Order and Progress." With this motto and his strong-arm methods, Díaz remained in power until 1911.

Order and progress did come to Mexico under Díaz, in spite of his methods. Railroads expanded, banks were built, the currency stabilized, and foreign investment grew. Mexico seemed to be a stable, prospering country. But appearances were deceiving. The wealthy owned more and more land, which they didn't put to good use. As a result, food costs rose steadily. Most Mexicans remained poor farmers and workers, and they continued to grow poorer.

**THINK THROUGH HISTORY**  
**C. Recognizing Effects** What effects did Díaz's rule have on Mexico?

### HISTORY MAKERS



**Francisco "Pancho" Villa**  
1877–1923

Pancho Villa was famous in Mexico, but infamous in the United States. In 1916, the United States permitted revolutionary politician Venustiano Carranza to use U.S. trains to transport troops who were fighting Villa in northern Mexico. In retaliation, Villa raided the town of Columbus, New Mexico, and killed 16 Americans traveling on a train in northern Mexico.

President Wilson was furious and ordered the U.S. Army to capture Villa. Villa hid out in the desert country he knew so well. The Americans never did find him.

Meanwhile, the Mexican government considered the American pursuit of Villa to be an invasion of its country. The United States and Mexico might well have gone to war over Villa. However, the United States entered World War I in 1917, forcing the withdrawal of its troops from Mexico.

## Revolution and Civil War

In the early 1900s, Mexicans from many walks of life began to protest Díaz's harsh rule. Idealistic liberals hungered for liberty. Farm laborers hungered for land. Workers hungered for fairer wages and better working conditions. Even some of Díaz's hand-picked political allies spoke out for reform. A variety of political parties began to form. Among the most powerful was a party led by Francisco Madero.

**Madero Begins the Revolution** Born into one of Mexico's ten richest families, **Francisco Madero** was educated in the United States and France. He believed in democracy and wanted to strengthen its hold in Mexico. Madero announced his candidacy for president of Mexico early in 1910. Soon afterward, Díaz had him arrested. From exile in the United States, Madero called for an armed revolution against Díaz.

The Mexican Revolution began slowly. Leaders arose in different parts of Mexico and gathered their own armies. In the north, cowboy **Francisco "Pancho" Villa** became immensely popular. He had a bold Robin-Hood policy of taking money from the rich and giving it to the poor. South of Mexico City, another strong, popular leader, **Emiliano Zapata**, raised a powerful revolutionary army. Like Villa, Zapata came from a poor family. He was determined to see that land was returned to peasants and small farmers. He wanted the laws reformed to protect their rights. "*Tierra y Libertad* [Land and Liberty]" was his battle cry. Villa, Zapata, and other armed revolutionaries won important victories against Díaz's army. By the spring of 1911, Díaz agreed to step down. He called for new elections.

**Mexican Leaders Struggle for Power** Madero was elected president in November 1911. But he had a difficult time holding on to power. He resigned and was murdered shortly afterward. The military leader General Victoriano Huerta then took over the presidency.

Huerta was unpopular with many people, including Villa and Zapata. These revolutionary leaders allied themselves with another politician who also wanted to overthrow Huerta. His name was Venustiano Carranza. Their three armies advanced, seizing the Mexican countryside from Huerta's forces and approaching the capital, Mexico City. They overthrew Huerta only 15 months after he took power.

Carranza took over the government. He then turned his army on his former revolutionary allies. Both Villa and Zapata continued to fight. In 1919, however, Carranza lured Zapata into a trap and murdered him. With Zapata's death, the civil war also came to an end. More than a million Mexicans had lost their lives.

**The New Mexican Constitution** Carranza began a revision of Mexico's constitution. It was adopted in 1917. A revolutionary document, that constitution is still in effect today. As shown in the chart below, it promoted education, land reforms, and workers' rights. Carranza didn't support the final version of the constitution, however, and in 1920, he was overthrown by his former general, Alvaro Obregón.

Reforms of Mexican Constitution of 1917			
Land	Religion	Labor	Social Issues
<ul style="list-style-type: none"> <li>• Breakup of large estates</li> <li>• Restrictions on foreign ownership of land</li> <li>• Government control of resources (oil)</li> </ul>	<ul style="list-style-type: none"> <li>• State takeover of land owned by the Church</li> </ul>	<ul style="list-style-type: none"> <li>• Minimum wage for workers</li> <li>• Right to strike</li> <li>• Institution of labor unions</li> </ul>	<ul style="list-style-type: none"> <li>• Equal pay for equal work</li> <li>• Limited legal rights for women (spending money and bringing lawsuits)</li> </ul>

**SKILLBUILDER: Interpreting Charts**

1. Which reforms do you think landowners resented?
2. Which reforms benefited workers?

Although Obregón seized power violently, he did not remain a dictator. Instead, he supported the reforms the constitution called for. He also promoted public education. Mexican public schools taught a common language—Spanish—and stressed nationalism. In this way, his policies helped unite the various regions and peoples of the country. Nevertheless, Obregón was assassinated in 1928.

The next year, a new political party that attempted to address the interests of all sectors of the society arose. Although the Institutional Revolutionary Party (PRI) did not tolerate opposition, it initiated an ongoing period of peace and political stability in Mexico. While Mexico was struggling toward peace, however, the rest of the world was on the brink of war.

**THINK THROUGH HISTORY**  
**D. Summarizing**  
 What were Obregón's accomplishments?

**Section 4 Assessment**

**1. TERMS & NAMES**

Identify

- Antonio López de Santa Anna
- Benito Juárez
- *La Reforma*
- Porfirio Díaz
- Francisco Madero
- Francisco "Pancho" Villa
- Emiliano Zapata

**2. TAKING NOTES**

In a chart like the one below, list the major accomplishment of each Mexican leader.

Leader	Major Accomplishment

Which leader do you think benefited his country most? Why?

**3. ANALYZING ISSUES**

Why did Juárez have trouble putting his liberal program *La Reforma* into action?

**THINK ABOUT**

- the types of reforms Juárez wanted
- how those reforms would affect Mexicans of the upper and lower classes
- the political climate of the country

**4. ANALYZING THEMES**

**Revolution** Juárez's motto for change in Mexico was "Liberty, Order, and Progress." Díaz's slogan was "Order and Progress." What did this difference in goals mean for the country?

**THINK ABOUT**

- Juárez's accomplishments
- Díaz's accomplishments
- the value of order and progress without liberty

# Chapter 12 Assessment

## TERMS & NAMES

Briefly explain the importance of each of the following to the changes in global power between 1800 and 1914.

1. Opium War
2. Taiping Rebellion
3. Boxer Rebellion
4. Meiji era
5. Russo-Japanese War
6. Monroe Doctrine
7. Spanish-American War
8. Antonio López de Santa Anna
9. Benito Juárez
10. Francisco "Pancho" Villa

### Interact with History

On page 334, you considered whether or not you would urge your country to trade with foreigners. Now that you've learned how several countries dealt with foreign influence and what the results were, would you change your recommendation? Discuss your ideas in a small group.

## REVIEW QUESTIONS

SECTION 1 (pages 335–339)

### China Responds to Pressure from the West

11. Why was China traditionally not interested in trading with the West?
12. What conditions during the Qing Dynasty gave rise to the Taiping Rebellion?
13. Although Guangxu's Hundred Days of Reform failed, what changes did it finally set in motion?

SECTION 2 (pages 340–343)

### Japan Modernizes

14. What events caused Japan to end its isolation and begin to westernize?
15. What were the results of Japan's growing imperialism at the end of the 19th century?

SECTION 3 (pages 344–348)

### U.S. Economic Imperialism in Latin America

16. How were Latin American caudillos able to achieve power and hold on to it?
17. What effects did the Monroe Doctrine and the Roosevelt Corollary have on Latin America?
18. Why was the United States so intent on building the Panama Canal?

SECTION 4 (pages 349–353)

### The Mexican Revolution

19. What were the major causes of tension between the Mexicans and the American colonists who settled in Texas?
20. What roles did Francisco "Pancho" Villa and Emiliano Zapata play in the Mexican Revolution?

## Visual Summary

### Transformations Around the Globe

#### China

- Fails to prevent Britain from pursuing illegal opium trade in 1839 **Opium War**
- Deals with internal unrest during almost two decades of Hong Xiuquan's **Taiping Rebellion**
- Attempts to build self-sufficiency during 1860s in **self-strengthening movement**
- Violently opposes foreigners in 1900 **Boxer Rebellion**
- Begins to establish **constitutional government** in 1908

#### Japan

- Signs 1854 **Treaty of Kanagawa**, opening Japanese ports to foreign trade
- Modernizes based on Western models during **Meiji era** (1867–1912)
- Fights 1894 **Sino-Japanese War** seeking control of Korea
- Wages 1904 **Russo-Japanese War** seeking control of Manchuria
- Annexes Korea in 1910

#### Latin America

- Depends on **exports** to fuel economy
- Receives much **foreign investment**
- Gains U.S. military support in 1898 **Spanish-American War**
- Becomes crossroads of world trade when U.S. completes **Panama Canal** in 1914

#### Mexico

- Fights to hold **Texas territory** from U.S. colonialism (1835–1845)
- Tries to establish a national identity in the early 1850s under Benito Juárez's **La Reforma**
- Overcomes **French occupation** in 1867
- Stages the **Mexican Revolution** in 1910

### Foreign Influence

## CRITICAL THINKING

### 1. BYPASSING THE EMPRESS

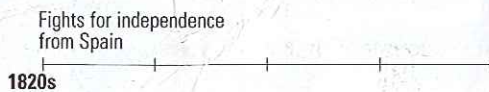
Do you think that Emperor Guangxu would have been able to put his reforms into practice if the Dowager Empress Cixi had not intervened? Why or why not? Think about China's government, its attitude toward foreign influence, and Guangxu's power.

### 2. THE SWORD VS. THE PEN

**THEME REVOLUTION** Consider what you have learned in this and other chapters about Latin American colonial history and about how countries undergo change. What are the pros and cons of both military strategies and peaceful political means of improving a country's economic, social, and political conditions?

### 3. CHARTING SANTA ANNA'S CAREER

On a time line like the one below, indicate the major events of Santa Anna's military and political career in Mexico. Why do you think he was able to remain in power for so long?



### 4. ANALYZING PRIMARY SOURCES

In 1877, the Meiji era of modernization in Japan had been underway for about a decade. The following excerpt from an article in one of Japan's major newspapers, the *Tokyo Times*, comments on the changes that had taken place. Read the selection and answer the questions that follow.

#### A VOICE FROM THE PAST

In the second and third years of Meiji, the demand for foreign goods remarkably increased. Those who formerly looked upon them with contempt changed their minds and even dressed in foreign clothes. Our males adopted the European style. They put on fine tall hats instead of wearing large [queues] on their heads, and took to carrying sticks after discarding their swords. They dressed in coats of the English fashion and trousers of the American. They would only eat from tables and nothing would satisfy them but French cookery.

- Do you think this newswriter sees the adoption of foreign ways as a good or a bad thing for Japan? What specific words in the article make you feel that way?
- What dangers might a nation face when its people uncritically take on the behaviors and ways of life of another culture?

## CHAPTER ACTIVITIES

### 1. LIVING HISTORY: Unit Portfolio Project

**THEME EMPIRE BUILDING** Your unit portfolio project focuses on empire building and colonialism. For Chapter 12, you might use one of the ideas suggested below:

- Stage a debate between a conservative member of the Dowager Empress Cixi's court and an official in Emperor Mutsuhito's Meiji government. Each should defend the leader's position on dealing with foreign intervention.
- Create a poster that dramatically illustrates one of the challenges that Mexico faced from the 1840s to the 1920s.
- Design an action figure based on one of the reformers or leaders you studied in this chapter. Draw a picture of the figure or construct a simple model. Then write a paragraph describing the reformer.

### 2. CONNECT TO TODAY: Cooperative Learning

**THEME CULTURAL INTERACTION** On May 5, 1862, badly outnumbered Mexican forces defeated the French at the Battle of Puebla. Mexicans still celebrate their country's triumph on the holiday Cinco de Mayo.

Working with a team, honor Cinco de Mayo by presenting a report to the class about some aspect of Mexican culture.

**INTERNET** Use the Internet, books, interviews, and other resources to gather information about topics such as Mexican customs and traditions, music, dance, holidays, food, or art.

- Collect pictures or samples, or decide how you will demonstrate your Mexican custom to make it come alive for the class.
- Consider staging a cultural fair and inviting other students, administrators, parents, and community members to participate.

### 3. INTERPRETING A TIME LINE

Study the unit time line on pages 248–249. Which events on the Chapter 12 segment were the result of U.S. imperialism? of European imperialism? of Japanese imperialism?

## FOCUS ON GEOGRAPHY

The United States wanted the Panama Canal so badly that it both supported a revolution and suffered the deaths of thousands of workers to get it built.

- How many miles did the canal cut from a trip between San Francisco and New Orleans?
- Would a trip from Rio de Janeiro to Valparaíso be shorter via the Panama Canal or the Strait of Magellan?

**Connect to History** How might the canal have forced Latin American countries to change?

### Sea Routes and the Panama Canal

