### 1. KEY CONCEPTS

**Imperialism** is a policy in which one country seeks to extend its authority by conquering other countries or by establishing economic and political dominance over other countries. The first chart below discusses the four forms of imperialist authority.

Each European nation had certain policies and goals for establishing colonies. To establish control of an area, Europeans used different techniques. Over time, **four forms** of colonial control emerged: colony, protectorate, sphere of influence, and economic imperialism. In practice, gaining control of an area might involve the use of several of these forms.

<table>
<thead>
<tr>
<th>FORM</th>
<th>DEFINITION</th>
<th>EXAMPLE</th>
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<tbody>
<tr>
<td>COLONY</td>
<td>A country or a territory governed internally by a foreign power</td>
<td>Somaliland in East Africa was a French colony.</td>
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<tr>
<td>PROTECTORATE</td>
<td>A country or a territory with its own internal government but under the control of an outside power</td>
<td>Britain established a protectorate over the Niger River delta.</td>
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<tr>
<td>SPHERE OF INFLUENCE</td>
<td>An area in which an outside power claims exclusive investment or trading privileges</td>
<td>Liberia was under the sphere of influence of the United States.</td>
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<tr>
<td>ECONOMIC INFLUENCE</td>
<td>An independent but less-developed country controlled by private business interests rather than other governments</td>
<td>The Dole Fruit company controlled pineapple trade in Hawaii.</td>
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2. A NEW PERIOD OF IMPERIALISM

The imperialism of the 18th and 19th centuries was conducted differently from the explorations of the 15th and 16th centuries. In the earlier period, imperial powers often did not penetrate far into the conquered areas in Asia and Africa. Nor did they always have a substantial influence on the lives of the people.

During this new period of imperialism, the Europeans demanded more influence over the economic, political, and social lives of the people. They were determined to shape the economies of the lands to benefit European economies. They also wanted the people to adopt European customs.

2.1. Forms of Control

European rulers also developed methods of day-to-day management of the colony. Two basic methods emerged. Britain and other nations—such as the United States in its Pacific Island colonies—preferred indirect control. France and most other European nations wielded a more direct control. Later, when colonies gained independence, the management method used had an influence on the type of government chosen in the new nation.

<table>
<thead>
<tr>
<th>Indirect Control</th>
<th>Direct Control</th>
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<tbody>
<tr>
<td>• Local government officials used</td>
<td>• Foreign officials brought in to rule</td>
</tr>
<tr>
<td>• Limited self-rule</td>
<td>• No self-rule</td>
</tr>
<tr>
<td>• Goal: to develop future leaders</td>
<td>• Goal: assimilation</td>
</tr>
<tr>
<td>• Government institutions are based on European styles but may have local rules.</td>
<td>• Government institutions are based only on European styles.</td>
</tr>
</tbody>
</table>

Examples:
- British colonies such as Nigeria, India, Burma
- U.S. colonies on Pacific Islands
- French colonies such as Somaliland, Vietnam
- German colonies such as German East Africa
- Portuguese colonies such as Angola
2.2. The race for the imperial world

By the begging of 19th century the imperialism was reduced to the American continent, where Spanish and Portuguese had controlled it. By 1800 both Iberian empires were weak and Great Britain and other European countries had been started their industrial revolution. In less than 50 years this map experimented a great change when Europeans started their own race to control the world. In this race, Spain and Portugal will be the biggest losers. By 1898 the imperial world map was:
3. THE CAUSES

**ECONOMIC CAUSES**
- **Mercantilism**: A nation that exploits their colony.
- **Natural resources**: Needed to fuel the Industrial Revolution in Europe.
- **New markets**: Needed to sell the products produced during the Industrial Revolution.
- Economic growth led to increased global influence because Europe wanted to spread their power.

**IDEOLOGICAL CAUSES**
- Missionaries wanted to spread Christianity.
- Spread culture and traditions to other nations.
- Western nations wanted to **civilize** “barbaric” nations (White Man Burden).
- Social Darwinism: The strong nations will survive and take over the weaker nations.

**POLITICAL CAUSES**
- Powerful nations needed new products and military bases.
- European powers competed for land and military bases.
- **Nationalism**: Countries believed that they should be allowed to compete with other nations to create a more powerful society. The strong should rule. Stronger states were able to have power since they were able to have power.
4. THE SCRAMBLE FOR AFRICA

The Scramble for Africa (also known as the Race for Africa or Partition of Africa) was the invasion, occupation, colonization, and annexation of territory by European powers during the New Imperialism period between 1881 and 1914.

That race’s main cause was the industrialization which stirred ambitions in many Europeans nations. They wanted more resources to fuel their industrial production. They competed for new markets for their goods. Many nations looked to Africa as a source of raw materials and as a market for industrial products.

4.1. Africa before European domination

In the mid-1800s African peoples were divided into hundreds of ethnic and linguistic groups. Most continued to follow traditional beliefs, while others converted to Islam or Christianity. These groups spoke more than 1000 different languages.

Europeans had established contacts with sub-Saharan Africans as early as the 1450s and some coastal points. Europeans did not travel into the interior and they did not navigate African rivers since 1800s, when steam-powered boats allowed Europeans to conduct major expeditions into the interior of Africa. First Europeans who did penetrate the interior of Africa were explorers, missionaries, or humanitarians who opposed the European and American slave trade.
In the late 1860s, David Livingstone, a missionary from Scotland, traveled with a group of Africans deep into central Africa to promote Christianity. Several years passed with no word from him and many people feared he was dead. In 1871 Dr. Livingstone was found on the shores of Lake Tanganyika. He had been exploring the Congo River and his discoveries sparked the interest of King Leopold II of Belgium, who wanted the control of Congo River valley. Leopold claimed that his primary motive in Congo was to abolish the slave trade and promote Christianity. However, he licensed companies that brutally exploited Africans by forcing them to collect sap from rubber plants. At least 10 million Congolese died due to the abuses inflicted during Leopold’s rule. In 1908, the Belgian government took control of the colony away from Leopold and it became known as the Belgian Congo.

4.2. The division of Africa: The Berlin Conference

The scramble for African territory had begun about 1880. At that time, the French began to expand from the West African coast toward western Sudan. The discoveries of diamonds in 1867 and gold in 1886 in South Africa increased European interest in colonizing the continent. No European power wanted to be left out of the race. The competition was so fierce that European countries feared war among themselves. To prevent conflict, fourteen European nations met at the Berlin Conference (1884-85) to lay down rules for the division of Africa. Europeans agreed that any European country could claim land in Africa by notifying other nations of its claims and showing it could control the area. The conference, which was organized by Otto von Bismarck, first chancellor of Germany, finished dividing the continent with little thought about how African ethnic or linguistic groups were distributed. No African ruler was invited to attend these meetings. By 1914, only Liberia and Ethiopia remained free from European control.

4.3. THE GREATEST COLONIAL EMPIRES IN AFRICA

In Africa, the greatest colonial empires were Great Britain and France's empires. Germany started to build its colonial empire later.

a) GREAT BRITAIN

Great Britain pretended to connect its colonial territories from North (Egyptian colony) to South (South Africa colony) by means of a railway route which should connect Cairo with Capetown. For that reason they needed to control all African territories from North to South.

They had Suez Canal control too which was very important for their commercial routes with its India colony.

b) FRANCE

France aspired to connect its territories into an horizontal axis from East to West, connecting its Atlantic territories with its Indian territories.
c) GERMANY

Bismarck knew that European countries finally would crash for their territorial ambitions, so Germany should keep away from the race. However, when Bismarck was forced into retirement, Germany started a violent race for African territories, colliding with French interests over Moroccan territories.

4.4. CONFLICTS OVER AFRICA

As Bismarck had predicted, conflicts came soon. Some of these colonial crashes will be the WWI prelude.
5. ASIA

European imperialism followed a different pattern in Asia than in Africa. In Asia Europeans were also surrounded by evidence of complex civilizations much older than their own, so they did not use the colonial formula.

5.1. British India

The most important possession for the British were the India. The British had entered India as traders in the early 1600s, but a century later they had established fortified bases along the coasts and had become involved in the internal politics of the Empire.

British even had their own army of Indian soldiers known as sepoys to protect the British East India Company which became the greatest power in India.

The primary objective for the Company was to control the trade but it also governed over the territories helping the administrative structure of the Mughals. Later, the local governors put in administrative place 1000 British civilians as civil servants. Since that moment the Indian society will be divided between Indians and Europeans, especially when English became as an official language of higher
education, governor and business. In a few years, some Indian customs will be prohibited and Christian missionaries contributed to increasing cultural reforms among the Indian people.

Although many Indians accepted British rule, those who had been displaced from power did not. Those Indian leaders inspired a revolt in the Indian army in 1857, which soon spread in the general population in parts of northern India. The Indian Mutiny did not affect most of India. The majority of the Indian army and Western-educated Indians remained loyal to the British.

5.3. China

By the late 1700s the Qing dynasty was in decline. The civil-service system had grown so corrupt and the army had fallen apart while bandits roamed the countryside.

Europeans, especially the British, were particularly interested in obtaining Chinese tea, a popular drink in Britain. However, the Qing dynasty feared foreign contacts. The Chinese saw the Europeans as barbarians and had little need for their products. Westerners now began to demand that China permit trade on an equal basis. Under pressure from Europeans and some Chinese merchants, the Qing eventually permitted a strictly limited trade with some ports.

The Opium War. Eventually, British and American merchants discovered a product that the Chinese would pay silver to buy: the opium. Europeans bought opium from India and smuggled it into China in exchange for silver and other goods as silks and teas. By 1830s opium sales had grown so dramatically that the imbalance of trade had been reversed. Alarmed by the drain of silver from China’s economy to pay for opium, as well as worried by the health and economic problems the drug was causing, Chinese authorities worked to stop the opium trade. In 1939 the imperial government decided to end the illegal trade, harming the interest of foreign merchants and provoking a war, known such as Opium War. When the war finished, China was forced to accept a new trade agreement and to pay a large war indemnity and to cede the island of Hong Kong to Great Britain.

Despite their defeat in the Opium War, Chinese officials continued to resist dealing with the westerners, and the westerners decided to force China, even they occupied Beijing in 1860. Western culture fueled the discontent that many of them felt toward their imperial government. As the Qing continued to lose prestige and power to Europeans, a new leader in southern China rebelled against the dynasty. Hong Xiuquan was a Christian, who believed that he was the younger brother of Jesus Christ and that God had commanded him to save humanity. Hong Xiuquan preached a message of social equality, including women, and called for strict moral behavior. He and his followers rebelled against the Qing emperor in 1850 and proclaimed the Taiping or “Heavenly Peace”. The Taiping Rebellion swept through nearly half of China. The Qing responded to the Taiping Rebellion using European technologies and put an end to the rebellion in 1864, but million of people had died during the revolt, which left cities and countryside destroyed and China became weaker.

In 1900, a new revolt against the West influence became popular. This revolt is called Boxers, a secret society which wanted to cleanse China of foreign influences. The movement spread quickly across northern China and they started to attack missionaries and journalist and even the diplomatic community in Beijing. A German-led international army arrived to stop the violence.

Some years later Qing dynasty ended.
5.4. Japan and the Meiji Restoration

While Europeans were forcing China open, the United States pursued a similar goal in Japan. Japan had been a traditional and closed society, which had had some minor trade with the Dutch, but an imperial decree had ordered Japanese officials to drive off all foreign ships. Such regulations offended many European countries. In 1852 the United States became determined to open Japan to the outside world, using even the naval forces.

The U.S. demands threw Japan into a state of crisis. Many of the Japanese aristocracy believed that unless Japan could rapidly acquire the same technology that the westerners possessed, it was only a matter of time before the country was swallowed up completely by Europeans.

The Meiji Restoration were all the reforms that the emperor approved in order to copy all the Western-style. They abolished feudalism and adopted a constitution based on the autocratic model of Prussia. Japan also began to build up its defenses and as well its industrial base. They also sent students overseas to Western universities to study Western technology and brought foreign experts to Japan to improve industry.

Then, they started to imitate the West: Japan not only remained independent but also became an imperial power in its own right. Japan defeated China in the 1894-95 Sino-Japanese War, in which China lost Taiwan to Japan and China recognized Korea's independence. Korea's independence soon became a target of Russian imperial expansion, which saw 1902 Anglo-Japanese Alliance such a danger for its imperial desires. In 1904 Russia and Japan crashed; Japanese defeated the Russians, sinking Russia's entire fleet. Thus, Japan had become a great world power.