

Woodblock print of landscape by
Katsushika Hokusai

Coffee (1935), Candido Portinari

China Resists Outside Influence

MAIN IDEA

CULTURAL INTERACTION

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.

TERMS & NAMES

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

CALIFORNIA STANDARDS

10.4.4 Describe the independence struggles of the colonized regions of the world, including the roles of leaders, such as Sun Yat-sen in China, and the roles of ideology and religion.

CST 1 Students compare the present with the past, evaluating the consequences of past events and decisions and determining the lessons that were learned.

CST 4 Students relate current events to the physical and human characteristics of places and regions.

SETTING THE STAGE 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 and the West

China was able to reject these offers from the West because it was largely self-sufficient. The basis of this self-sufficiency was China's 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 huge population.

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 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 (gwahn-g'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.

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.

TAKING NOTES

Identifying Problems

Use a chart to identify the internal and external problems faced by China in the 1800s and early 1900s.

China's Problems	
Internal	External

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OBJECTIVES

- Explain China's resistance to foreigners.
- Describe rebellions that shook China.
- Summarize effects of China's reforms.
- Trace the growth of nationalism there.

1 FOCUS & MOTIVATE

Explain that this section describes the importance of foreign trade. Ask students to think of items associated with the United States that are the result of trade or influence from elsewhere. (Possible Answers: pizza—Italy, Statue of Liberty—France)

2 INSTRUCT

China and the West

10.4.4

Critical Thinking

- How did resistance to technology hurt China? (*China's outdated boats lost to British gunboats.*)
- How did the extraterritorial treaty help foreigners? (*not subject to law in certain ports*)

CALIFORNIA RESOURCES

California Reading Toolkit, p. L54
California Modified Lesson Plans for English Learners, p. 103
California Daily Standards Practice Transparencies, TT46
California Standards Enrichment Workbook, pp. 53–54
California Standards Planner and Lesson Plans, p. L99
California Online Test Practice
California Test Generator CD-ROM
California Easy Planner CD-ROM
California eEdition CD-ROM

SECTION 1 PROGRAM RESOURCES

ALL STUDENTS

In-Depth Resources: Unit 3

- Guided Reading, p. 71
- History Makers: Cixi, p. 86
- Geography Application: The Opium Wars, p. 77

Formal Assessment

- Section Quiz, p. 207

ENGLISH LEARNERS

In-Depth Resources in Spanish

- Guided Reading, p. 96
- Geography Application: The Opium Wars, p. 101

Reading Study Guide (Spanish), p. 127

Reading Study Guide Audio CD (Spanish)

STRUGGLING READERS

In-Depth Resources: Unit 3

- Guided Reading, p. 71
- Building Vocabulary, p. 75
- Geography Application: The Opium Wars, p. 77
- Reteaching Activity, p. 90

Reading Study Guide, p. 127

Reading Study Guide Audio CD

GIFTED AND TALENTED STUDENTS

In-Depth Resources: Unit 3

- Primary Source: from Letter to Queen Victoria, p. 79

Electronic Library of Primary Sources

- from *Two Years in the Forbidden City*

INTEGRATED TECHNOLOGY

eEdition CD-ROM

Voices from the Past Audio CD

Power Presentations CD-ROM

World Art and Cultures Transparencies

- AT60 Sorting of Cocoons

Electronic Library of Primary Sources

- from *Two Years in the Forbidden City*

classzone.com

More About . . .

China's Opium Addiction

In the 19th century, opium addiction spread rapidly among Chinese government employees and soldiers. Historians blame the drug for a decline in China's standard of living and for the deterioration of public services, which eventually led to massive peasant uprisings during the mid-1800s.

In-Depth Resources: Unit 3

- Primary Source: from Letter to Queen Victoria, p. 79

Growing Internal Problems 10.4.4

Critical Thinking

- What caused the increase in opium addiction in the mid-19th century? (*serious economic and social problems; opium was readily available*)
- How did Hong's withdrawal from everyday life contribute to the fall of the Taiping government? (*Leaders fought with one another, weakening the kingdom.*)
- What is ironic about the name Taiping, meaning "great peace"? (*The movement led to destruction and millions dead.*)

Connect to Today

Special Economic Zones

After the British defeated China in the Opium War of 1842, Shanghai became a major port of trade. Since then it has grown into one of the most crowded urban centers in the world.

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

PRIMARY SOURCE

By what right do they [British merchants] . . . use the poisonous drug 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. 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**. Under these rights, foreigners were not subject to Chinese law at Guangzhou and four other Chinese ports. Many Chinese greatly resented the foreigners and the bustling trade in opium they conducted.

Growing Internal Problems

Foreigners were not the greatest of China's problems in the mid-19th century, however. The country's own population provided an overwhelming challenge. The number of Chinese grew to 430 million by 1850, a 30 percent gain in only 60 years. Yet, in the same period of time, food production barely increased. As a result, hunger was widespread, even in good years. Many people became discouraged, and opium addiction rose steadily. As their problems mounted, the Chinese began to rebel against the Qing Dynasty.

MAIN IDEA

Analyzing Issues

What conflicting British and Chinese positions led to the Opium War?

A. Answer the British desire to trade with China and shift the balance of trade in its own favor; the Chinese resentment of the harm opium caused its citizens

Connect to Today

Special Economic Zones

Today, as in the late 1800s, the Chinese government limits foreign economic activity to particular areas of the country. Most of these areas, called special economic zones (SEZs), are located on the coast and waterways of southeastern China. Established in the late 1970s, the SEZs are designed to attract, but also control, foreign investment.

One of the most successful SEZs is Shanghai (pictured at right). By the late 1990s, dozens of foreign companies—including IBM of the United States, Hitachi of Japan, Siemens of Germany, and Unilever of Great Britain—had invested about \$21 billion in the building and operating of factories, stores, and other businesses. This investment had a huge impact on the economy of Shanghai. Throughout the 1990s, it grew by more than 10 percent each year.



DIFFERENTIATING INSTRUCTION: ENGLISH LEARNERS

Geography of the Opium Wars

Class Time 40 minutes

Task Using a map, a graph, and text to answer comprehension questions

Purpose To practice reading maps and graphs; to improve understanding of important concepts in the chapter

Instructions When students have finished reading the "China and the West" section of the text, distribute the Geography Activity for this chapter (available in English and Spanish). Write difficult

terms from the activity on the board along with their meanings. (*Possible Answers: "flooding the market" = making large amounts of a product available for sale, which lowers the price; "vested interest" = a personal reason for supporting something*) Have pairs of students work on reading the text, the map, and the chart and then answering the questions.

Geography Application: Movement

La Guerra del Opio

The Opium Wars

Chinese Opium Imports, 1700–1800

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In-Depth Resources in Spanish

In-Depth Resources: Unit 3

The Taiping Rebellion During the late 1830s, Hong Xiuquan (hung shee•oo•choo•ahn), a young man from Guangdong province in southern China, began recruiting followers to help him build 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 movement was called the **Taiping Rebellion**, from the Chinese word *taiping*, meaning “great peace.”

By the 1850s, Hong had organized a massive peasant army of some one million people. Over time, the Taiping army took control of large areas of southeastern China. Then, in 1853, Hong captured the city of Nanjing and declared it his capital. Hong soon withdrew from everyday life and left family members and his trusted lieutenants in charge of the government of his kingdom.

The leaders of the Taiping government, however, constantly feuded among themselves. Also, Qing imperial troops and British and French forces all launched attacks against the Taiping. By 1864, this combination of internal fighting and outside assaults had brought down the Taiping government. But China paid a terrible price. At least 20 million—and possibly twice that many—people died in the rebellion. ■



▲ A Taiping force surrounds and destroys an enemy village.

B. Answer little change in the status of the people and massive death and destruction

MAIN IDEA

Recognizing Effects

■ What were the results of the Taiping Rebellion?

Vocabulary

A *dowager* is a widow who holds a title or property from her deceased husband.

Foreign Influence Grows

The Taiping Rebellion and several 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 issues. Some government leaders called for reforms patterned on Western ways. Others, however, clung to traditional ways and accepted change very reluctantly.

Resistance to Change During the last half of the 19th century, one person was in command at the Qing imperial palace. The Dowager Empress Cixi (tsoo•shee) held the reins of power in China from 1862 until 1908 with only one brief gap. 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. This program aimed to update China’s educational system, diplomatic service, and military. Under this program, China set up factories to manufacture steam-powered gunboats, rifles, and ammunition. The self-strengthening movement had mixed results, however.

Other Nations Step In Other countries were well aware of China’s continuing problems. Throughout the late 19th century, many foreign nations took advantage of the situation and attacked China. Treaty negotiations after each conflict gave these nations increasing control over China’s economy. Many of Europe’s major powers and Japan gained a strong foothold in China. This foothold, or **sphere of influence**, was an area in which the foreign nation controlled trade and investment. (See the map on page 374.)

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

More About . . .

Hong Xiuquan

Hong Xiuquan had a dream in his early twenties that he believed ordered him to fight evil. From then on, he worked to overthrow the Qing dynasty. Hong had his own vision of Christianity, which forbade drugs, alcohol, and gambling. Under Hong, men and women were treated as equals. Women were allowed to fight for Hong’s causes; however, the sexes were kept separate, even husbands and wives.

Foreign Influence Grows

10.4.4

Critical Thinking

- What is one indication that the self-strengthening movement was not entirely successful? (*China’s military was still not strong enough to defeat its attackers.*)
- How did “sphere of influence” differ from the Open Door Policy? (*Sphere of influence—A specific country controlled trade in a certain area. Open Door Policy—All countries had equal trade opportunities.*)

Tip for English Learners

Explain that the word *sphere*, as part of the phrase “sphere of influence,” means “area.” A sphere is also a shape, such as a ball, a globe, or a planet.

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DIFFERENTIATING INSTRUCTION: GIFTED AND TALENTED STUDENTS

Origins of the Taiping Rebellion

Class Time 45 minutes

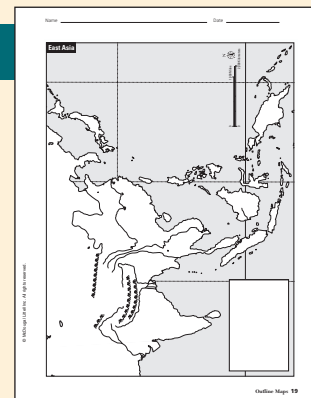
Task Researching ideology behind the Taiping Rebellion

Purpose To share information with the class by creating an inventive presentation

Instructions Tell students that the ideas that fueled the Taiping Rebellion were a mix of ancient ideals and modern practical methods. For example, the rebels worked the land and shared resources collectively. Men and women also were treated as equals at home and in the workplace.

Encourage students to do additional research on the ideology behind this massive uprising, using encyclopedias and books such as Jean Chesneau’s *China from the Opium Wars to the 1911 Revolution*.

Have students present their information in a creative format, such as a mural, a Web site, or a skit. Students may choose to use a map in their presentations to orient the class to the areas in which the rebellion took place.



Geography Skills and Outline Maps

History from Visuals

Interpreting the Map

Ask students which nations had both colonies and spheres of influence in China. (*Great Britain, France, Japan*)

Extension The United States did not have a colony or a sphere of influence in China during this period. Have students research the history of U.S. dealings with China.

SKILLBUILDER Answers

- 1. Human-Environment Interaction**
Britain, France, Germany, Japan, Russia
- 2. Location** Britain; the Chang Jiang



GEOGRAPHY SKILLBUILDER: Interpreting Maps

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

An Upsurge in Chinese Nationalism

10.4.4

Critical Thinking

- What act by the Dowager Empress helped cause the Boxer Rebellion? (*arresting Guangxu*)
- Why did Guangxu's arrest make the Chinese people unhappy? (*He was trying to make changes that would help them economically.*)

In-Depth Resources: Unit 3

- History Makers: Cixi, p. 86

Electronic Library of Primary Sources

- from *Two Years in the Forbidden City*

the **Open Door Policy**. This proposed that China's "doors" be open to merchants of all nations. Britain and the other European nations agreed. The policy thus protected both U.S. trading rights in China, and China's freedom from colonization. But the country was still at the mercy of foreign powers.

An Upsurge in Chinese Nationalism

Humiliated by their loss of power, many Chinese pressed for strong reforms. Among those demanding change was China's young emperor, Guangxu (gwahn•shoo). In June 1898, Guangxu introduced measures to modernize China. These measures called for reorganizing China's educational system, strengthening the economy, modernizing the military, and streamlining the government.

Most Qing officials saw these innovations as threats to their power. They reacted with alarm, calling the Dowager Empress back to the imperial court. On her return, she acted with great speed. She placed Guangxu under arrest and took control of the government. She then reversed his reforms. Guangxu's efforts brought about no change whatsoever. The Chinese people's frustration with their situation continued to grow.

The Boxer Rebellion This widespread frustration finally erupted into violence. Poor peasants and workers resented the special privileges granted to foreigners. They also resented Chinese Christians, who had adopted a foreign faith. To demonstrate their discontent, they formed a secret organization called the Society of Righteous and 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**.

DIFFERENTIATING INSTRUCTION: STRUGGLING READERS

Recognizing Causes and Effects

Class Time 25 minutes

Task Creating a chart of causes and effects

Purpose To understand complex events in the struggle between China and Western powers

Instructions Explain that an event can have more than one effect. Divide students into small groups. Have them draw a chart like the one shown here and then work together to fill in the causes. Review students' charts as a class and discuss the different effects students listed. Students who need more help may complete the Reading Study Guide for this lesson.

CAUSE	EFFECT	EFFECT
1. British bring opium to China.	Many Chinese become addicted.	Opium War
2. Hong Xiuquan starts Taiping Rebellion.	Rebels control south.	Millions die.
3. United States declares Open Door Policy.	China is safe from colonization.	China is still dominated by foreign powers.
4. Workers launch the Boxer Rebellion.	Chinese nationalism increases.	Major reforms are enacted.

CHAPTER 12 Section 1 (pages 369–377)

China Resists Outside Influence

BEFORE YOU READ
In the last section, you read about imperialism in Asia. In this section, you will see how China dealt with imperialism.

AS YOU READ
Use the chart below to take notes on events that occurred in China.

CAUSE	EFFECT ON CHINA
British bring opium to China	

China and the West
What China was able to resist: foreign influence?

What Happened as a Result of the Opium War?

Reading Study Guide

More About . . .

Reform in China

In the early 1900s, women in China began questioning their traditional roles as wives and mothers. Exposed to Western fashions and Western ideas, many unwrapped the binding that crippled their feet and kept them close to home. Some pursued an education either in China or in Japan. These “nontraditional” women pledged loyalty to each other and gained support from men who promised to start a new social trend and marry women with the still-unfashionable “large” feet. Some women even joined the Revolutionary Alliance and worked along with men toward political reform in China.



▲ A gang of Boxers attacks Chinese Christians.

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 19,000 troops marched on Beijing and 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. Even more important, they felt that 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 their 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.

However, the turmoil in China did not end with these progressive steps. China experienced unrest for the next four decades as it continued to face internal and external threats. China’s neighbor Japan also faced pressure from the West during this time. But it responded to this influence in a much different way.

MAIN IDEA

Analyzing Causes Why did the Boxer Rebellion fail?

C. Answer Dowager Empress Cixi expressed support but did not back up her words with actions. A multinational force overpowered the rebels.

SECTION 1 ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.
 • Opium War • extraterritorial rights • Taiping Rebellion • sphere of influence • Open Door Policy • Boxer Rebellion

USING YOUR NOTES
 2. Which created the most trouble for China, internal problems or external problems? Why? (10.4.4)

China's Problems	
Internal	External

MAIN IDEAS
 3. Why did the Chinese have little interest in trading with the West? (10.4.4)
 4. What internal problems did China face prior to the Taiping Rebellion? (10.4.4)
 5. Why did Emperor Guangxu’s efforts at reform and modernization fail? (10.4.4)

CRITICAL THINKING & WRITING
 6. **ANALYZING MOTIVES** Why do you think European powers established spheres of influence in China rather than colonies, as they did in Africa and other parts of Asia? (10.4.4)
 7. **MAKING INFERENCES** What importance did spheres of influence have for China? (10.4.4)
 8. **COMPARING AND CONTRASTING** What were the similarities and differences between the Taiping Rebellion and the Boxer Rebellion? (CST 1)
 9. **WRITING ACTIVITY** **CULTURAL INTERACTION** Write a dialogue between two of Dowager Empress Cixi’s advisers—one arguing for continued isolation, the other for openness to foreign influence and trade. (Writing 2.1.c)

INTEGRATED TECHNOLOGY **INTERNET ACTIVITY**
 Use the Internet to find information on special economic zones in China. Use your findings to create an **annotated map** showing the location of these zones. (10.4.4)

INTERNET KEYWORDS
special economic zones, SEZs

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3 ASSESS

SECTION 1 ASSESSMENT

Have students work individually to complete items 1 and 2 and work in small groups to complete the remaining items.

Formal Assessment
 • Section Quiz, p. 207

4 RETEACH

Use the Guided Reading activity for Section 1 to review the main ideas for this section.

In-Depth Resources: Unit 3
 • Guided Reading, p. 71
 • Reteaching Activity, p. 90

ANSWERS

1. Opium War, p. 372 • extraterritorial rights, p. 372 • Taiping Rebellion, p. 373 • sphere of influence, p. 373 • Open Door Policy, p. 374 • Boxer Rebellion, p. 374

- 2. **Sample Answer:** Internal—Growing population, corrupt officials opposed to reform, inability to handle external problems. External—Influence of foreign powers, extraterritorial rights for foreigners, growing opium trade. Most troublesome—Internal, because resistance to reform led to more problems.
- 3. The Chinese were economically self-sufficient.
- 4. growing population, poor harvests, corruption, growing opium addiction

- 5. Qing officials felt threatened; Dowager Empress committed to tradition
- 6. **Possible Answer:** China’s size and its centralized government made conquest difficult.
- 7. China had less control over trade and investment.
- 8. Taiping—Threatened Qing Dynasty. Boxer—Anger toward foreigners. Both failed, yet moved China toward reform.

- 9. **Rubric** Dialogues should
 - include arguments for and against openness to outside influence.
 - illustrate the turmoil the debate created.

INTEGRATED TECHNOLOGY

- Rubric** Annotated maps should
- identify locations of special economic zones in China.
 - include interesting facts on these special economic zones.
 - cite sources.

LESSON PLAN

OBJECTIVES

- Explain why Japan ended its isolation.
- Trace the growth of Japanese imperialism.

1 FOCUS & MOTIVATE

Discuss advantages and disadvantages of living in a modern society. (*Possible Answers: Technology makes life easier; rapid change can cause people to lose jobs.*)

2 INSTRUCT

Japan Ends Its Isolation

10.4.2

Critical Thinking

- What was one negative result of Japan isolating itself from the rest of the world? (*failure to modernize*)
- Why did Japan institute the Treaty of Kanagawa? (*to avoid threat of attack by Perry*)
- What other country that you have studied also looked to Europe and the United States as models for restructuring its society? (*China*)

CALIFORNIA RESOURCES

California Reading Toolkit, p. L55
California Modified Lesson Plans for English Learners, p. 105
California Daily Standards Practice Transparencies, TT47
California Standards Enrichment Workbook, pp. 49–50
California Standards Planner and Lesson Plans, p. L101
California Online Test Practice
California Test Generator CD-ROM
California Easy Planner CD-ROM
California eEdition CD-ROM



Woodblock print of landscape by Katsushika Hokusai

Coffee (1935), Candido Portinari

2

Modernization in Japan

MAIN IDEA

CULTURAL INTERACTION 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.

TERMS & NAMES

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

CALIFORNIA STANDARDS

10.4.2 Discuss the locations of the colonial rule of such nations as England, France, Germany, Italy, Japan, the Netherlands, Russia, Spain, Portugal, and the United States.

CST 2 Students analyze how change happens at different rates at different times; understand that some aspects can change while others remain the same; and understand that change is complicated and affects not only technology and politics but also values and beliefs.

REP 4 Students construct and test hypotheses; collect, evaluate, and employ information from multiple primary and secondary sources; and apply it in oral and written presentations.

HI 1 Students show the connections, causal and otherwise, between particular historical events and larger social, economic, and political trends and developments.

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, Japanese society was very tightly ordered. The shogun parceled out land to the daimyo, or lords. The peasants worked for and lived under the protection of their daimyo and his small army of samurai, or warriors. This rigid feudal system managed to keep the country free of civil war. Peace and relative prosperity reigned in Japan for two centuries.

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 merchants from Indonesia. They also had diplomatic contact with Korea. However, trade was growing in importance, both inside and outside Japan.

The Demand for Foreign Trade Beginning in the early 19th century, Westerners tried 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. These massive black wooden ships powered by steam astounded the Japanese. The ships' cannons also shocked them. The Tokugawa shogun realized he had no choice but to receive Perry and the letter Perry had brought from U.S. president Millard Fillmore.

Fillmore's letter politely asked the shogun to allow free trade between the United States and Japan. Perry delivered it with a threat, however. He would come back with a larger fleet in a year to receive Japan's reply. That reply was the **Treaty of Kanagawa** of 1854. Under its terms, Japan opened two ports at which U.S. ships could take on supplies. After the United States had pushed open the door, other Western powers soon followed. By 1860, Japan, like China, had granted foreigners permission to trade at several treaty ports. It had also extended extraterritorial rights to many foreign nations.

Meiji Reform and Modernization The Japanese were angry that the shogun had given in to the foreigners' demands. They turned to Japan's young emperor, Mutsuhito (moot•soo•HEE•toh), who seemed to symbolize the country's sense of

TAKING NOTES

Analyzing Causes List the steps that Japan took toward modernization and the events that contributed to its growth as an imperialistic power.

Modernization
Imperialism

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SECTION 2 PROGRAM RESOURCES

ALL STUDENTS

In-Depth Resources: Unit 3

- Guided Reading, p. 72

Formal Assessment

- Section Quiz, p. 208

ENGLISH LEARNERS

In-Depth Resources in Spanish

- Guided Reading, p. 97

Reading Study Guide (Spanish), p. 129

Reading Study Guide Audio CD (Spanish)

STRUGGLING READERS

In-Depth Resources: Unit 3

- Guided Reading, p. 72
- Building Vocabulary, p. 75
- Reteaching Activity, p. 91

Reading Study Guide, p. 129

Reading Study Guide Audio CD

GIFTED AND TALENTED STUDENTS

In-Depth Resources: Unit 3

- Primary Source: from *The Autobiography of Yukichi Fukuzawa*, p. 80

Electronic Library of Primary Sources

INTEGRATED TECHNOLOGY

eEdition CD-ROM

Power Presentations CD-ROM

Geography Transparencies

- GT28 Japanese Imperialism, 1875–1910

World Art and Cultures Transparencies

- AT61 *Japanese Girl in Western Dress*

Electronic Library of Primary Sources

- from *Fifty Years of New Japan*

classzone.com

pride and nationalism. In 1867, the Tokugawa shogun stepped down, ending the military dictatorships that had lasted since the 12th century. Mutsuhito took control of the government. He chose the name *Meiji* for his reign, which means “enlightened rule.” Mutsuhito’s reign, which lasted 45 years, is known as the **Meiji era**.

The Meiji emperor realized that the best way to counter Western influence was to modernize. He sent diplomats to Europe and North America to study Western ways. The Japanese then chose what they believed to be the best that 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. 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.

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 railroad. 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, made Japan competitive with the West.

Imperial Japan

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, foreign powers accepted the

Imperial Japan

10.4.2

Critical Thinking

- What were the first steps toward imperialism for Japan? (*modernizing, increasing military power, ending extraterritorial rights*)
- How many wars did Japan engage in to control Korea? (*two—the Sino-Japanese and Russo-Japanese wars*)
- What country did Britain colonize in a manner similar to Japan’s takeover of Korea? (*India*)

Geography Transparencies

- GT28 Japanese Imperialism, 1875–1910

Electronic Library of Primary Sources

- from *Fifty Years of New Japan*

History from Visuals

Interpreting the Chart

Ask students to summarize the information in the chart in their own words.

(Possible Answer: *China and Japan both emerged from isolation. China took longer to reform and modernize than Japan did.*)

Extension Encourage interested students to find out more about China’s military defeats in contrast to Japan’s military victories. Suggest that they research the Second Opium War, the Russian takeover of Manchuria, and the Sino-French War.

SKILLBUILDER Answers

1. **Contrasting** China remained isolated from the West longer. Japan quickly adapted Western ways.
2. **Comparing** hatred of Western imperialism, initial resistance to change

China and Japan Confront the West



China

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

▲ The Dowager Empress Cixi (1862–1908)

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. **Contrasting** According to the diagram, in what ways did China and Japan deal differently with Western influence?
2. **Comparing** What similar responses did each country share despite the different paths they followed?

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DIFFERENTIATING INSTRUCTION: ENGLISH LEARNERS



Japan Adapts the Best of the West

Class Time 15 minutes

Task Creating a graphic organizer

Purpose To understand what Japan adapted from other countries and what it means to adapt something

Instructions Tell students that, like China, Japan looked to the outside world when its leaders decided to make changes. Japan looked for countries that had the best ways of organizing government, the military, and education.

Have students work in pairs. Ask each pair to make a chart like the one pictured and then reread the text to find the information. Remind students that the word *adapt* means to change something to fit a new situation.

Nation	What Japan Adapted
Germany	government, constitution, army
Great Britain	navy
United States	educational system

More About . . .

Extraterritorial Rights

The Japanese showed how much they had learned about Western thinking when they convinced Western nations to give up their territorial rights in Japan. Realizing that a major reason that these nations fought for extraterritorial rights was that they didn't understand other nations' systems of justice, Japan assured them that its system was similar to their own and that they would receive fair treatment on Japanese soil.

Analyzing Political Cartoons

Warlike Japan

Have the class brainstorm adjectives that describe the animals' temperaments and activities in the cartoon. (*Possible Answer: Both animals are considered strong and fierce, but the bird of prey is dominating the bear.*)

Extension Suggest that interested students draw a cartoon that depicts the relationship between Japan and Korea during this era. Have students present their cartoons to the class and explain why they chose to portray these countries as they did.

SKILLBUILDER Answers

- 1. Clarifying** Japan is pictured as a bird of prey and is wielding a bloodstained knife.
- 2. Making Inferences** *Possible Answers:* the people of Manchuria; the people of Korea

abolition of extraterritorial rights for 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. As in Europe, national pride played a large part in Japan's imperial plans. 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 neighbor, Korea. In 1876, Japan forced Korea to open three ports to Japanese trade. But China also considered Korea to be important both as a trading partner and a military outpost. 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. This Sino-Japanese War lasted just a few months. In that time, Japan drove the Chinese out of Korea, destroyed the Chinese navy, and gained a foothold in Manchuria. In 1895, China and Japan signed a peace treaty. This treaty gave Japan its first colonies, Taiwan and the neighboring Pescadore Islands. (See the map on page 369.)

Russo-Japanese War Japan's victory over China changed the world's balance of power. Russia and Japan emerged as the major powers—and enemies—in East Asia. The two countries soon went to war over Manchuria. 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.

In February 1904, Japan launched a surprise attack on Russian ships anchored off the coast of Manchuria. In the resulting **Russo-Japanese War**, Japan drove

MAIN IDEA

Making Inferences

Why did Japan become imperialistic?

A. Possible Answer It had grown economically and militarily strong enough, and it wanted to show that it was a powerful nation.

Vocabulary

Sino: a prefix meaning "Chinese"

Analyzing Political Cartoons

Warlike Japan

Cartoonists often use symbols to identify the countries, individuals, or even ideas featured in their cartoons. Russia has long been symbolized as a bear by cartoonists. Here, the cartoonist uses a polar bear.

Prior to the Meiji era, cartoonists usually pictured Japan as a fierce samurai. Later, however, Japan often was symbolized by a caricature of Emperor Mutsuhito. Here, the cartoonist has exaggerated the emperor's physical features to make him look like a bird of prey.

SKILLBUILDER: Interpreting Political Cartoons

- 1. Clarifying** How does the cartoonist signify that Japan is warlike?
- 2. Making Inferences** In their fight, Russia and Japan appear to be crushing someone. Who do you think this might be?



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SKILLBUILDER PRACTICE: ANALYZING POLITICAL CARTOONS

Understanding Political Cartoons

Class Time 30 minutes

Task Creating a chart

Purpose To learn how to analyze political cartoons

Instructions Explain that political cartoons use caricature and exaggeration to make a serious point. A caricature is a drawing that emphasizes a certain feature or characteristic of the subject.

Ask students to draw a chart like the one shown on this page. Have them identify the subject of the cartoon. (*Japan's defeat of Russia*) Next, ask students to identify important symbols and details. (*Japan looks angry and is holding a knife and a Russian soldier; Japan is digging claws into the polar bear, Russia; Russia is holding weapons but looks defeated; Russia*

is crushing what appears to be a man.) Then have students interpret its message. (*Japan has defeated Russia; both Russia and Japan have crushed what we can assume is Korea.*) Ask students to collect two or three political cartoons and analyze them, recording their analysis in chart form. Students who need more practice with this skill should complete the Skillbuilder Practice activity for this chapter, which can be found in In-Depth Resources: Unit 3.

Identify subject	
Identify details and symbols	
Interpret message	

Russian troops out of Korea 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.

Japanese Occupation of Korea 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** on Korea, or brought that country under Japan's control.

The Japanese were harsh rulers. They shut down Korean newspapers and took over Korean schools. There they replaced the study of Korean language and history with Japanese subjects. 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. Resentment of Japan's repressive rule grew, helping to create a strong Korean nationalist movement.

The rest of the world clearly saw the brutal results of Japan's imperialism. Nevertheless, the United States and other European countries largely ignored what was happening in Korea. They were too busy 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

MAIN IDEA

Clarifying

How did Japan treat the Koreans after it annexed the country?

B. Answer harshly and brutally

SECTION 2

ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

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

USING YOUR NOTES

2. Do you think that Japan could have become an imperialistic power if it had not modernized? Why or why not? (HI 1)

Modernization
Imperialism

MAIN IDEAS

- How was the Treaty of Kanagawa similar to the treaties that China signed with various European powers? (10.4.2)
- What steps did the Meiji emperor take to modernize Japan? (10.4.2)
- How did Japan begin its quest to build an empire? (10.4.2)

CRITICAL THINKING & WRITING

- ANALYZING CAUSES** What influences were most important in motivating Japan to build its empire? (10.4.2)
- FORMING AND SUPPORTING OPINIONS** In your view, was Japan's aggressive imperialism justified? Support your answer with information from the text. (10.4.2)
- ANALYZING BIAS** How did Japan's victory in the Russo-Japanese War both explode and create stereotypes? (10.4.2)
- WRITING ACTIVITY** **EMPIRE BUILDING** In the role of a Japanese official, write a **letter** to the government of a Western power explaining why you think it is necessary for your country to build an empire. (Writing 2.5.a)

CONNECT TO TODAY CREATING A SYMBOL

Conduct research to discover the name that Akihito, the present emperor of Japan, chose for his reign. Then create a **symbol** that expresses the meaning of this name.

Transformations Around the Globe 379

Global Impact

Western Views 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 was called the *yellow peril* influenced world politics for many decades.

Global Impact

Western Views of the East

As students continue their study of world history, encourage them to look for examples of ongoing racism against the Japanese and against Japanese Americans, particularly during World War II. Also encourage further investigation of current relations between Japan and Korea. The Internet is a good resource.

Vocabulary Note: Academic Vocabulary

The terms *colony*, *protectorate*, and *annexed territory* have distinct meanings. A colony is controlled by a far-off country. A protectorate's government is partly controlled by another country. Annexed territory has been made part of another country.

3 ASSESS

SECTION 2 ASSESSMENT

Have students work in small groups to complete item 9 and the Connect to Today activity. Let groups share their final products with the class.

Formal Assessment

- Section Quiz, p. 208

4 RETEACH

Use the Reteaching Activity to review the main ideas of the section.

In-Depth Resources: Unit 3

- Reteaching Activity, p. 91

ANSWERS

1. Treaty of Kanagawa, p. 376 • Meiji era, p. 377 • Russo-Japanese War, p. 378 • annexation, p. 379

- Sample Answer:** Modernization—Military, government, and education. Imperialism—Defeat of China, Russia, Korean takeover. Modernization gave Japan the military strength to win wars.
- granted trade permission to foreigners; extended extraterritorial rights
- studied Western ways and moved toward industrialization
- by gaining control of Korea

- further intrusion by European trading nations into Japan and nearby lands; growing sense of power
- Yes—Japan had to expand to compete against European powers. No—Harsh methods against other countries were not necessary for Japan's advancement.
- The victory exploded the myth that European whites were superior in warfare. It created the myth of an Asian world takeover.

- Rubric** Letters should
 - explain Japan's reasons for wanting to build an empire.
 - express Japan's desire to be taken seriously as a major power.

CONNECT TO TODAY

- Rubric** Symbols should
- illustrate the meaning of the name.
 - be drawn neatly.

History *through* Art

OBJECTIVES

- Understand the origin and process of woodblock printing.
- Appreciate the work of famous Japanese woodblock artists.

FOCUS & MOTIVATE

Woodblock printing requires intense concentration and steadiness of hand. Ask students to compare this art form with others they have studied, including painting and sculpting. Which art form would they, themselves, be most likely to enjoy, and why?

INSTRUCT

Critical Thinking

- What might the artist be revealing about Naniwaya Okita's character by portraying her gazing into a mirror? (Possible Answers: concerned with beauty and appearance; vain or self-critical)
- What is one possible theme of Katsushika Hokusai's *Under the Wave off Kanagawa*? (Possible Answers: forces of nature; humans vs. nature)

Tip for Gifted and Talented Students

Woodblock prints by different artists often have similar characteristics. Ask interested students to compare and contrast the work shown here by Utamaro with the fine art transparency *Japanese Girl in Western Dress*, by Yoshitoshi. Have them compare and contrast the expression, attire, and detail of the subjects, along with objects depicted.

World Art and Cultures Transparencies

- AT61 *Japanese Girl in Western Dress*

Japanese Woodblock Printing

Woodblock printing in Japan evolved from black-and-white prints created by Buddhists in the 700s. By the late 1700s, artists learned how to create multicolor prints.

Woodblock prints could be produced quickly and in large quantities, so they were cheaper than paintings. In the mid-1800s, a Japanese person could buy a woodblock print for about the same price as a bowl of noodles. As a result, woodblock prints like those shown here became a widespread art form. The most popular subjects included actors, beautiful women, urban life, and landscapes.

INTEGRATED TECHNOLOGY

RESEARCH LINKS For more on Japanese woodblock printing, go to classzone.com

**▲ Naniwaya Okita**

The artist Kitagawa Utamaro created many prints of attractive women. This print shows Naniwaya Okita, a famous beauty of the late 1700s. Her long face, elaborate hairstyle, and many-colored robes were all considered part of her beauty.

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**▲ Carving the Block**

These photographs show a modern artist carving a block for the black ink. (The artist must carve a separate block for each color that will be in the final print.)

Carving the raised image requires precision and patience. For example, David Bull, the artist in the photographs, makes five cuts to create each strand of hair. One slip of the knife, and the block will be ruined.

RECOMMENDED RESOURCES

Books

Forrer, Matthi. *Hokusai: Prints and Drawings*. New York: Prestel USA, 2001. Includes 13 drawings and 151 woodblock prints by Hokusai.

Kobayashi, Tadashi. *Ukiyo-E: An Introduction to Japanese Woodblock Prints*. New York: Kodansha International, 1997. Explores the world of Japanese woodcuts.

Nagata, Seiji. *Hokusai: Genius of the Japanese Ukiyo-E*. New York: Kodansha International, 2000.

Video

The Life & Works of Hokusai: The Art of Printmaking. VHS. Library Video Company, 2002. 800-843-3620.

More About . . .

Kitagawa Utamaro

Utamaro is primarily known for his precise and masterful compositions of beautiful Japanese women. During the height of his success, he created prints of a famous military leader's wife and his concubines. For this act, he was arrested and handcuffed for 50 days, accused of insulting the leader's dignity. Utamaro did not fully recover from the experience emotionally; he did not paint again.

More About . . .

Katsushika Hokusai

Hokusai was a Japanese master artist and printmaker. Early in his career he helped develop the *ukiyo-e* tradition, or "pictures of the floating world." Enjoying his fame, Hokusai was sometimes known to paint in front of crowds, creating portraits of mythical figures up to 2,000 square feet. At the height of his popularity, he was summoned to paint before the ruler of Japan. Hokusai worked from age 18 to age 89, in his later years calling himself "the old man mad with painting."

▲ **Under the Wave off Kanagawa**

Katsushika Hokusai was one of the most famous of all Japanese printmakers. This scene is taken from his well-known series *Thirty-Six Views of Mount Fuji*. Mount Fuji, which many Japanese considered sacred, is the small peak in the background of this scene.

▲ **Printing**

After the carved block is inked, the artist presses paper on it, printing a partial image. He or she repeats this stage for each new color. The artist must ensure that every color ends up in exactly the right place, so that no blocks of color extend beyond the outlines or fall short of them.

Connect to Today

- 1. Making Inferences** What personal qualities and skills would an artist need to be good at making woodblock prints?
See Skillbuilder Handbook, page R10.
- 2. Forming and Supporting Opinions** Hokusai's print of the wave, shown above, remains very popular today. Why do you think this image appeals to modern people?

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CONNECT TO TODAY: ANSWERS**1. Making Inferences**

Possible Answers: patience, precision, good drawing ability, a steady hand, the ability to organize a step-by-step process

2. Forming and Supporting Opinions

Possible Answers: the artistry, including the colors and the sweeping line of the waves; the print's portrayal of the beauty and danger in nature; the tension created by showing an enormous wave about to swamp a boat; the unusual perspective of an enormous wave and a tiny mountain

LESSON PLAN

OBJECTIVES

- Explain how Latin America's colonial legacy shaped its history.
- Document how foreign powers influenced Latin American economies.
- Trace effects of the Monroe Doctrine and the Roosevelt Corollary.

1 FOCUS & MOTIVATE

Discuss what benefits and problems independence can bring. (*Benefits—Don't have to obey anyone, responsible for own future. Problems—Help and advice may not be available.*)

2 INSTRUCT

Latin America After Independence

10.4.1

Critical Thinking

- What other country have you studied in this chapter in which the ruling class kept the working class from financial gain? (*Korea, during period of Japanese control*)

CALIFORNIA RESOURCES

California Reading Toolkit, p. L56
California Modified Lesson Plans for English Learners, p. 107
California Daily Standards Practice Transparencies, TT48
California Standards Enrichment Workbook, pp. 47–48
California Standards Planner and Lesson Plans, p. L103
California Online Test Practice
California Test Generator CD-ROM
California Easy Planner CD-ROM
California eEdition CD-ROM



Woodblock print of landscape by Katsushika Hokusai

Coffee (1935), Candido Portinari

U.S. Economic Imperialism

MAIN IDEA

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

CALIFORNIA STANDARDS

10.4.1 Describe the rise of industrial economies and their link to imperialism and colonialism (e.g., the role played by national security and strategic advantage; moral issues raised by the search for national hegemony, Social Darwinism, and the missionary impulse; material issues such as land, resources, and technology).

CST 3 Students use a variety of maps and documents to interpret human movement, including major patterns of domestic and international migration, changing environmental preferences and settlement patterns, the frictions that develop between population groups, and the diffusion of ideas, technological innovations, and goods.

HI 5 Students analyze human modifications of landscapes and examine the resulting environmental policy issues.

WHY IT MATTERS NOW

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

TERMS & NAMES

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

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. Farm fields had been neglected and were overrun with weeds. Buildings in many cities bore the scars of battle. Some cities had been left in ruins. The new nations of Latin America faced a struggle for economic and political recovery that was every bit 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 laborers caught up in a cycle of poverty.

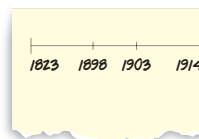
Colonial Legacy Both before and after independence, most Latin Americans worked for large landowners. The employers paid their workers with vouchers that could be used only at their own supply stores. Since wages were low and prices were high, workers went into debt. Their debt accumulated and passed from one generation to the next. In this system known as peonage, “free” workers were little better than slaves.

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. Then they put those lands up for sale. Wealthy landowners were the only people who could 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 the landowners' inability to use it effectively combined to prevent social and economic development in Latin America.

Political Instability Political instability was another 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 military dictators, or **caudillos** (kaw•DEEL•yohz). They were able to hold on to power because they were backed by the military. By the mid-1800s, nearly all the countries of Latin America were ruled by caudillos. One typical caudillo was Juan Vicente Gómez.

TAKING NOTES

Following Chronological Order Use a time line to list the major events in U.S. involvement in Latin America.



SECTION 3 PROGRAM RESOURCES

ALL STUDENTS

In-Depth Resources: Unit 3

- Guided Reading, p. 73

Formal Assessment

- Section Quiz, p. 209

ENGLISH LEARNERS

In-Depth Resources in Spanish

- Guided Reading, p. 98

Reading Study Guide (Spanish), p. 131

Reading Study Guide Audio CD (Spanish)

STRUGGLING READERS

In-Depth Resources: Unit 3

- Guided Reading, p. 73
- Building Vocabulary, p. 75
- Reteaching Activity, p. 92

Reading Study Guide, p. 131

Reading Study Guide Audio CD

GIFTED AND TALENTED STUDENTS

In-Depth Resources: Unit 3

- Primary Source: Building the Panama Canal, p. 81
- Connections Across Time and Cultures: Responses to Western Pressure, p. 88

- Science & Technology: Technology Revolutionizes Communications, p. 89

Electronic Library of Primary Sources

- from *The Rough Riders*

INTEGRATED TECHNOLOGY

eEdition CD-ROM

Power Presentations CD-ROM

Critical Thinking Transparencies

- CT28 Patterns of Resistance, 1830–1914

Electronic Library of Primary Sources

- from *The Rough Riders*

classzone.com

More About . . .

Caudillos
Caudillos ruled Latin America with a combination of bribery, patronage, and force. Although the constitutions of many Latin American nations were patterned after the U.S. Constitution, the documents were seldom upheld. As one of Latin America’s greatest liberators, Simón Bolívar, put it, “Treaties are scraps of paper; constitutions, printed matter; elections, battles; freedom, anarchy; and life, a torment.”

Economies Grow Under Foreign Influence

10.4.1

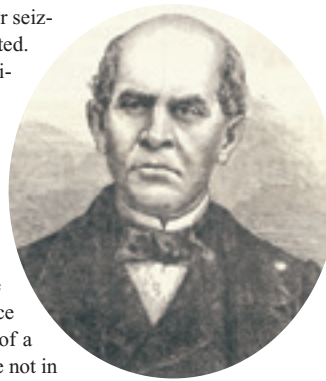
Critical Thinking

- How did the combination of railroads, steamships, and refrigeration help trade for Latin America? (*Refrigeration kept food from spoiling. Refrigerated compartments aboard ships and trains carried goods to distant markets.*)
- Why couldn’t an unindustrialized country be a major world power? (*Possible Answers: depended too much on manufactured goods from other countries; poor weather could ruin the crops and the economy*)

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 did not stay in office long. More often than not, a caudillo, supported by the army, seized control of the government.

The caudillos faced little opposition. The wealthy landowners 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 were not in power, most Latin Americans still lacked a voice in the government. Voting rights—and with them, political power—were restricted to the relatively few members of the upper and middle classes who owned property or could read.



▲ Argentine reformer Domingo Sarmiento

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 Latin America’s economies continued to depend on exports, no matter whom they were trading with. 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. As a result, they 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 economic stage.

▼ Workers unload coffee beans at a plantation in Brazil. Until recently, Brazil’s economy depended heavily on the export of coffee.



A. Answer poverty, lack of voice in government, lack of education

MAIN IDEA

Identifying Problems

What difficulties did lower-class Latin Americans continue to face after independence?

DIFFERENTIATING INSTRUCTION: ENGLISH LEARNERS



Analyzing Quotations and Academic Vocabulary

Class Time 30 minutes

Task Understanding sophisticated terms and quotations

Purpose To improve comprehension

Instructions Have pairs of students find difficult words, phrases, or quotations in the subsections “Latin America After Independence” and “Economies Grow Under Foreign Influence.” Ask each pair to create a chart like the one shown, with students working together to investigate meanings and contexts. Encourage students to use glossaries and dictionaries.

Term or Quotation	Clue	New Understanding
Colonial legacy, p. 382	Legacy means something left or handed down from the past.	The paragraph says “both before and after independence.” “Colonial legacy” must mean what was left after colonial times.
“All Venezuela is my cattle ranch.” p. 383	Restated: “I own everything, and I’ll do what I want with it.”	
unindustrialized, p. 383	Industrialized means a country has factories of its own.	

A Latin American Empire

10.4.1

Critical Thinking

- Why did U.S. security depend on Latin America? (*nearness—a hostile power could base operations in Latin America*)
- What caused Cubans to resent U.S. assistance in the Spanish-American War? (*After the war, the U.S. set up a military government in Cuba.*)
- What did the U.S. government do to secure its interest in Latin America? (*It established the Monroe Doctrine, issued the Roosevelt Corollary, and kept troops in Latin America.*)

Electronic Library of Primary Sources

- from *The Rough Riders*

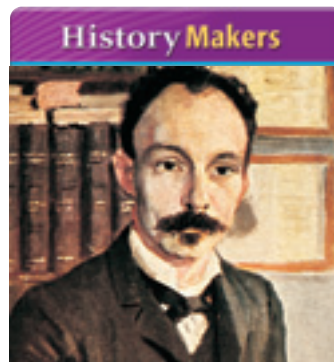
History Makers

José Martí

José Martí was a much-admired poet and essayist as well as a revolutionary. One of Martí's poems was set to music in 1961, and the song "Guantanamera" was made famous by U.S. folksinger Pete Seeger. Play a recording of this song for the class and ask students who speak or have studied Spanish to translate it.

Inclusion Tip

For those students who are hearing impaired, locate the original poem "Guantanamera," and ask a student who is fluent in Spanish to translate it in writing.



History Makers

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. Except for a brief return to his homeland in 1878, Martí remained in exile for about 20 years. For most of this time, he lived 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 about him that are still sung throughout the world.

INTEGRATED TECHNOLOGY

RESEARCH LINKS For more on José Martí, go to classzone.com

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 become 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 sometimes threatened to collect the debt by force. At other times, they threatened to take over the facilities they had funded. In this way, foreign companies gained control of many Latin American industries. This began a new age of economic colonialism in Latin America.

A Latin American Empire

Long before the United States had any economic interest in Latin American countries, it realized that it had strong links with its southern neighbors. Leaders of the United States were well aware that their country's security depended on the security of Latin America.

The Monroe Doctrine Most 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. So, in 1823, 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." Until 1898, though, the United States did little to enforce the Monroe Doctrine. Cuba provided a real testing ground.

Cuba Declares Independence The Caribbean island of 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 from Spain. In 1895, **José Martí**, a writer who had been exiled from Cuba by the Spanish, returned to launch a second war for Cuban independence. Martí was killed early in the fighting, but the Cubans battled on.

By the mid-1890s, 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 became known as the **Spanish-American War**, lasted about four months. U.S. forces launched their first attack not on Cuba but on the Philippine Islands, a Spanish colony thousands of miles away in the Pacific. Unprepared for a war on two fronts, the Spanish military quickly collapsed. (See the maps on the opposite page.)

B. Answers to protect its economic interests in Cuba and to protest Spain's brutal treatment of Cuban civilians

MAIN IDEA

Analyzing Motives

Why did the United States join the Cuban war for independence?

DIFFERENTIATING INSTRUCTION: STRUGGLING READERS

Chronology of Events in Latin America

Class Time 20 minutes

Task Creating a time line

Purpose To understand the chronological order and effects of Latin American historical events

Instructions Display Critical Thinking Transparency CT73. On the board, create a list of events like the one shown here. Ask students to work in small groups to create a chart like CT73 and fill it in using the events discussed under "A Latin American Empire." Students should locate

the events in the text and place them in the chart in chronological order, providing the date and a brief explanation for each.

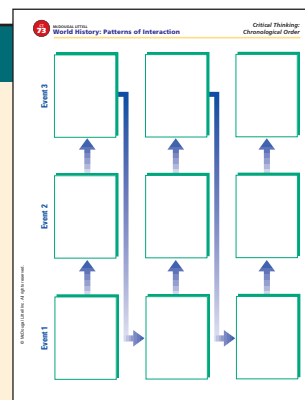
Panama Canal opens.

Monroe Doctrine issued.

Spanish-American War begins.

Roosevelt Corollary issued.

José Martí returns.



Critical Thinking Transparencies

The Spanish-American War, 1898: the Caribbean

The Spanish-American War, 1898: the Philippines



GEOGRAPHY SKILLBUILDER: Interpreting Maps

- 1. Location** Where is Cuba located in relation to the United States?
- 2. Location** In the war, the United States launched its first attack against the Philippine Islands. Why might this have surprised the Spanish?

In 1901, Cuba became an independent nation, at least in name. However, the United States installed a military government and continued to exert control over Cuban affairs. This caused tremendous resentment among many Cubans, who had assumed that the United States' aim in intervening was to help Cuba become truly independent. The split that developed between the United States and Cuba at this time continues to keep these close neighbors miles apart more than 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.

Connecting the Oceans Latin Americans were beginning to regard the United States as the political and economic “Colossus of the North.” The United States was a colossus in geographic terms too. By the 1870s, the transcontinental railroad connected its east and west coasts. But land travel still was time-consuming and difficult. And sea travel between the coasts involved a trip of about 13,000 miles around the tip of South America. If a canal could be dug across a narrow section of Central America, however, 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 this 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

Vocabulary
A *colossus* is a huge statue that towers over the surrounding area.

History from Visuals

Interpreting the Map

Encourage students to study each map and determine where U.S. forces originated, landed, and attacked. (*Tampa—Santiago; Hong Kong—near Manila*)

Extension Ask interested students to check the textbook atlas and determine the distance between Florida and Hong Kong. Have students speculate on why the United States decided to launch two attacks against the Spanish in two separate regions of the world. (*difficult for Spanish to fight in two distant places*)

SKILLBUILDER Answers

- 1. Location** Cuba is an island south of the United States.
- 2. Location** The Spanish likely expected the first attack to be in Cuba.

More About . . .

Europe and Latin America

European powers interfered many times in Latin American affairs during the 19th century before the United States enforced the Monroe Doctrine: Britain—the Argentinean Falkland Islands (1833); France—Mexico and Uruguay (several times between the 1830s and the 1860s); and Spain—the Chincha Islands (1862–1866).

In-Depth Resources: Unit 3

- Connections Across Time and Cultures: Responses to Western Pressure, p. 88

DIFFERENTIATING INSTRUCTION: GIFTED AND TALENTED STUDENTS

Analyzing Problems and Solutions in Imperialist Times

Class Time 25 minutes

Task Creating a problem/solution chart

Purpose To analyze problems and solutions in imperialist history, 1830–1914

Instructions Display Critical Thinking Transparency CT28. Ask students to choose one of the three countries to analyze. Then display transparency CT77, a problem/solution

graphic organizer. As students study the patterns of resistance in a country, have them create a similar chart with the appropriate information. Students may consult the text for additional information as they fill in the details.

When students have completed their charts, ask them to share their charts with the class. Discuss students' opinions of the outcome.

	China	Japan	Latin America
Background	Openness of markets	Openness of markets	Economic stagnation
Problems	U.S. efforts to force the opening of markets to U.S. goods and services	U.S. efforts to force the opening of markets to U.S. goods and services	U.S. efforts to force the opening of markets to U.S. goods and services
Solutions	U.S. efforts to force the opening of markets to U.S. goods and services	U.S. efforts to force the opening of markets to U.S. goods and services	U.S. efforts to force the opening of markets to U.S. goods and services
Outcomes	U.S. efforts to force the opening of markets to U.S. goods and services	U.S. efforts to force the opening of markets to U.S. goods and services	U.S. efforts to force the opening of markets to U.S. goods and services

Critical Thinking Transparencies

Science & Technology

OBJECTIVE

- Understand the operation and significance of the Panama Canal.

INSTRUCT

Have interested students read Arthur Bullard's description of the creation of the Panama Canal.

In-Depth Resources: Unit 3

- Primary Source: Building the Panama Canal, p. 81
- Science & Technology: Technology Revolutionizes Communications, p. 89

INTEGRATED TECHNOLOGY

Interactive This image is available in an interactive format on the eEdition. Students can read explanations of how the locks operate.

More About . . .

Early Attempts at Canal Building

In 1878 the French obtained the right to build a canal across Panama. Their original plan was to build the canal at sea level, but problems quickly arose and plans were drawn up using locks, similar to today's. The effort ran into trouble, however, when politicians stole money from the canal company, eventually causing bankruptcy. Scientists were unable to stop epidemics of tropical diseases from killing numerous workers. These problems eventually halted the French effort.

INTERACTIVE

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 diagram below, on entering the canal, ships are raised about 85 feet in a series of three locks. On leaving the canal, ships are lowered to sea level by another series of three locks.

The canal also had a lasting effect on other technologies. Since the early 1900s, ships have been built to dimensions that will allow them to pass through the canal's locks.

INTEGRATED TECHNOLOGY

RESEARCH LINKS For more on the Panama Canal, go to classzone.com

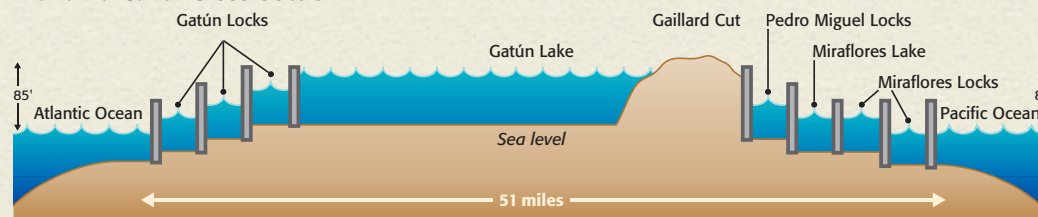
CALIFORNIA STANDARDS

10.4.1, HI 2



▲ Ships passing through the Pedro Miguel Locks

Panama Canal Cross-section



Canal Facts

- The canal took ten years to build (1904–1914) and cost \$380 million.
- During the construction of the canal, workers dug up more than 200 million cubic yards of earth.
- Thousands of workers died from diseases while building the canal.
- The trip from San Francisco to New York City via the Panama Canal is about 9,000 miles shorter than the trip around South America.
- The 51-mile trip through the canal takes 8 to 10 hours.
- The canal now handles more than 13,000 ships a year from around 70 nations carrying 192 million short tons of cargo.
- Panama took control of the canal on December 31, 1999.

▲ This cross-section shows the different elevations and locks that a ship moves through on the trip through the canal.

Connect to Today

- 1. Identifying Problems** What difficulties did workers face in constructing the canal?
See Skillbuilder Handbook, page R5.
- 2. Evaluating Decisions** In the more than 90 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.

CONNECT TO TODAY: ANSWERS

1. Identifying Problems

Possible Answers: deadly diseases, unsafe working conditions, distance from family

2. Evaluating Decisions

Yes—World trade has benefited by saving time and money; the canal was an important step forward in engineering technology. No—Human life is more valuable than time or money; air travel and highways have made the canal less important.

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 United States 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 decade, American engineers contended with floods and withering heat to build the massive waterway. However, their greatest challenge was the disease-carrying insects that infested the area. 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. Even so, thousands of workers died during construction of the canal. The **Panama Canal** finally opened in 1914. Ships from around the world soon began to use it. Latin America had become a crossroads of world trade. And the United States controlled the tollgate. 📌

MAIN IDEA**Analyzing Motives**

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

C. Possible Answers because the canal would provide a water route between the coasts of the United States and give the United States control over a direct trade link between the Atlantic and Pacific oceans

The 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 its 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 U.S. intervention in Latin America. U.S. troops occupied some countries for decades. Many Latin Americans protested this intervention, but they were powerless to stop their giant neighbor to the north. The U.S. government simply turned a deaf ear to their 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.

▼ This cartoon suggests that the Roosevelt Corollary turned the Caribbean into a U.S. wading pool.

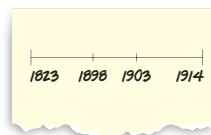
**SECTION 3 ASSESSMENT**

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

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

USING YOUR NOTES

2. Which event do you think was most beneficial to Latin America? Why? (10.4.1)

**MAIN IDEAS**

3. Why did the gap between rich and poor in Latin America grow after independence? (10.4.1)
4. What economic gains and setbacks did Latin American countries experience after independence? (10.4.1)
5. Why was the United States so interested in the security of Latin America? (10.4.1)

CRITICAL THINKING & WRITING

6. **ANALYZING MOTIVES** Why do you think upper-class Latin Americans favored governments run by caudillos? (10.4.1)
7. **FORMING OPINIONS** Do you think that U.S. imperialism was more beneficial or harmful to Latin American people? Explain. (10.4.1)
8. **CONTRASTING** How was the principle of the Roosevelt Corollary different from that of the Monroe Doctrine? (10.4.1)
9. **WRITING ACTIVITY** **REVOLUTION** Assume the role of a Cuban fighting for independence from Spain. Design a political poster that shows your feelings about the United States joining the struggle for independence. (Writing 2.2.b)

CONNECT TO TODAY CREATING A DATAFILE

Conduct research to find statistics on the ships and cargo that travel through the Panama Canal. Use your findings to create a **datafile** for usage of the canal in a recent year. (10.4.1)

Transformations Around the Globe 387

More About . . .**The Roosevelt Corollary**

The Roosevelt Corollary stated in part, “In the Western Hemisphere the adherence of the United States to the Monroe Doctrine may force the United States, however reluctantly, . . . to the exercise of an international police power.” In the first half of the 20th century, the United States used this corollary to justify sending troops into Haiti, Nicaragua, the Dominican Republic, Mexico, Cuba, Honduras, Guatemala, and Costa Rica.

Electronic Library of Primary Sources

- from *The Rough Riders*

3 ASSESS**SECTION 3 ASSESSMENT**

Have students work in pairs to complete items 6 through 9 and Connect to Today. Students may also compare answers to items 1 through 5 with their partners.

Formal Assessment

- Section Quiz, p. 209

4 RETEACH

Use the Reading Study Guide to review the main ideas of the section.

Reading Study Guide, p. 131

In-Depth Resources: Unit 3

- Reteaching Activity, p. 92

ANSWERS

1. caudillo, p. 382 • Monroe Doctrine, p. 384 • José Martí, p. 384 • Spanish-American War, p. 384 • Panama Canal, p. 387 • Roosevelt Corollary, p. 387

2. **Sample Answer:** 1823–Monroe Doctrine; 1898–Spanish-American War; 1903–Panamanian rebellion; 1914–Panama Canal opened. Most beneficial—Opening of canal, because it changed trade
3. rich got wealthy through land purchases; increased debt for poor
4. Latin American trade greatly increased, but no industrialization

5. to ensure its own security
6. Caudillos protected upper-class privileges.
7. Beneficial—Jobs and exports helped farmers and workers. Harmful—No independence was gained.
8. The Monroe Doctrine was intended to discourage European intervention. The corollary authorized U.S. intervention regardless of European involvement.

9. **Rubric** Posters should
- include text and visuals.
 - support or criticize U.S. intervention.

CONNECT TO TODAY

- Rubric** Datafiles should
- include the number of ships and the type and amount of cargo.
 - use tables, charts, or graphs.

LESSON PLAN

OBJECTIVES

- Describe the role of Antonio López de Santa Anna in the history of Mexico.
- Trace Juárez's reform movement.
- Describe the rule of Porfirio Díaz.
- Explain the causes and results of the Mexican Revolution.

1 FOCUS & MOTIVATE

Ask students what they know about the current government of Mexico. As they read this section, ask them to contrast Mexico's government today with the turmoil of the past.

2 INSTRUCT

Santa Anna and the Mexican War

10.4.4

Critical Thinking

- What caused the battle between Texas and Mexico? (*Americans in Mexico-controlled Texas wanted self-rule.*)

Electronic Library of Primary Sources

- "Alamo Massacre"

CALIFORNIA RESOURCES

California Reading Toolkit, p. L57
California Modified Lesson Plans for English Learners, p. 109
California Daily Standards Practice Transparencies, TT49
California Standards Enrichment Workbook, pp. 53–54
California Standards Planner and Lesson Plans, p. L105
California Online Test Practice
California Test Generator CD-ROM
California Easy Planner CD-ROM
California eEdition CD-ROM



Woodblock print of landscape by Katsushika Hokusai

Coffee (1935), Candido Portinari

Turmoil and Change in Mexico

MAIN IDEA

REVOLUTION 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.

TERMS & NAMES

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

CALIFORNIA STANDARDS

10.4.4 Describe the independence struggles of the colonized regions of the world, including the roles of leaders, such as Sun Yat-sen in China, and the roles of ideology and religion.

REP 4 Students construct and test hypotheses; collect, evaluate, and employ information from multiple primary and secondary sources; and apply it in oral and written presentations.

SETTING THE STAGE The legacy of Spanish colonialism and long-term political instability that plagued the newly emerging South American nations caused problems for Mexico as well. Mexico, however, had a further issue to contend with—a shared border with the United States. The "Colossus of the North," as the United States was known in Latin America, wanted to extend its territory all the way west 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 the European power tried to regain control of Mexico. Then, in 1833, Santa Anna became Mexico's president.

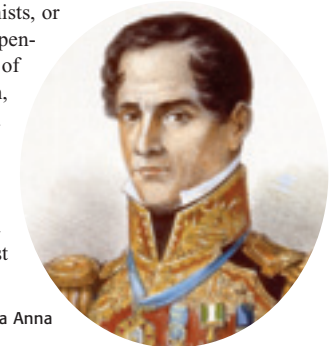
One of Latin America's most powerful caudillos, Santa Anna was a clever politician. He would support a measure one year and oppose it the next if he thought that would keep him in power. His policy seemed to work. Between 1833 and 1855, Santa Anna was Mexico's president four times. He gave up the presidency twice, however, to serve Mexico in a more urgent cause—leading the Mexican army in an effort to retain 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, answered the call. 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, a leading Anglo, encouraged a revolt against Mexico in 1835.

TAKING NOTES

Comparing Use a chart to compare the major accomplishments of the Mexican leaders discussed in this section.

Leader	Major Accomplishment



► Mexican leader Santa Anna

388 Chapter 12

SECTION 4 PROGRAM RESOURCES

ALL STUDENTS

In-Depth Resources: Unit 3

- Guided Reading, p. 74
- History Makers: Porfirio Díaz, p. 87

Formal Assessment

- Section Quiz, p. 210

ENGLISH LEARNERS

In-Depth Resources in Spanish

- Guided Reading, p. 99

Reading Study Guide (Spanish), p. 133

Reading Study Guide Audio CD (Spanish)

388 Chapter 12

STRUGGLING READERS

In-Depth Resources: Unit 3

- Guided Reading, p. 74
- Building Vocabulary, p. 75
- Reteaching Activity, p. 93

Reading Study Guide, p. 133

Reading Study Guide Audio CD

GIFTED AND TALENTED STUDENTS

In-Depth Resources: Unit 3

- Primary Source: from *The Plan of Ayala*, p. 82
- Literature: from *Tom Mix and Pancho Villa*, p. 83

Electronic Library of Primary Sources

- "Alamo Massacre"

INTEGRATED TECHNOLOGY

eEdition CD-ROM

Power Presentations CD-ROM

Critical Thinking Transparencies

- CT64 Chapter 28 Visual Summary

World Art and Cultures Transparencies

- AT62 *Distribution of the Land*

Electronic Library of Primary Sources

- "Alamo Massacre"

classzone.com



◀ Santa Anna's army met with strong resistance from the defenders of the Alamo.

Santa Anna led Mexican forces north to try to hold on to the rebellious territory. He won a few early battles, including a bitter fight at the Alamo, a mission in San Antonio. However, his fortunes changed at the Battle of San Jacinto. His troops were defeated and he was captured. Texan leader Sam Houston released Santa Anna after he promised to respect the independence of Texas. When Santa Anna returned to Mexico in 1836, he 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. Outraged Mexicans considered this an 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** (HWAHR•ehz), 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 Zapotec Indian who was orphaned at the age of three. While Santa Anna put his own personal power first, Juárez worked primarily to serve his country. 📌

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 a law degree in 1831.

A. Answer Juárez was a poor Indian who worked for the powerless. Santa Anna was a well-to-do Creole concerned mainly with maintaining his own power.

MAIN IDEA

Contrasting

📌 In what ways did Benito Juárez differ from Santa Anna?

Transformations Around the Globe 389

More About . . .

Antonio López de Santa Anna

Santa Anna was an opportunist who was true only to his own hunger for power, both inside and outside Mexico. In 1833, for example, he was elected as a liberal. When the country became more conservative, he too shifted to the right. Then, in 1845, U.S. president James Polk helped Santa Anna return from exile, with the understanding that Santa Anna would help mediate a peace agreement between the United States and Mexico over the status of Texas. Instead, Santa Anna led the Mexican army in battle against the United States.

Juárez and La Reforma

10.4.4

Critical Thinking

- How is the cycle of debt Mexicans experienced similar to peonage in Latin America? (*Rich landowners kept wages low and did not allow workers to buy land.*)
- What was one reason for Benito Juárez's rise to power and continued success? (*Possible Answers: He came from poverty, so people trusted him; he fought for years to help the people of Mexico get land and an education.*)

DIFFERENTIATING INSTRUCTION: ENGLISH LEARNERS

Creating a Time Line of the Mexican Revolution

Class Time 30 minutes

Task Creating a time line

Purpose To understand events and leaders of the Mexican Revolution

Instructions Have students keep track of the key terms and names in the section by placing them in a time line, like the one in the Reading Study Guide activity (also available in Spanish). Students can use the text and questions in the Reading Study Guide to determine whether any dates should be added to their time line. Encourage

students to develop a color system, such as using a different color for each historical figure.

1861—Benito Juárez and his supporters win control of the government.

1862—France invades Mexico.

1872—Juárez dies of a heart attack.

1876—Porfirio Díaz takes over Mexico.

1911—Díaz gives up power.

CHAPTER 12 • Section 4 (pages 388–393)	KEY TERMS AND NAMES
Turmoil and Change in Mexico	Antonio López de Santa Anna leader of Mexico's military and a conservative; Santa Anna's leader of the Mexican army during the Mexican Revolution; Santa Anna's leader of the Mexican army during the Mexican Revolution
BEFORE YOU READ In the last section, you read about U.S. economic imperialism in Latin America. In this section, you will read about revolution and reform in Mexico.	Porfirio Díaz leader of the Mexican Revolution; Díaz's leader of the Mexican Revolution
AS YOU READ Use the text to answer the questions and take notes on the reforms and key events of the Mexican Revolution.	Benito Juárez leader of the Mexican Revolution; Juárez's leader of the Mexican Revolution
Santa Anna and the Mexican War (pages 388–393)	Juárez and La Reforma (pages 394–401)
Who was Santa Anna? Antonio López de Santa Anna was a military leader in the 19th century of independent Mexico. He fought the Mexican Revolution from 1821 to 1829. He fought against Spain again in 1829 when Spain tried to reorganize Mexico. He served as Mexican president four times.	What was La Reforma? La Reforma was a series of reforms that began in 1821. It was aimed at making Mexico a more modern country. It was aimed at making Mexico a more modern country. It was aimed at making Mexico a more modern country.
What was the Mexican Revolution? The Mexican Revolution was a series of armed conflicts that took place between 1910 and 1920. It was aimed at making Mexico a more modern country. It was aimed at making Mexico a more modern country. It was aimed at making Mexico a more modern country.	What was the Mexican Revolution? The Mexican Revolution was a series of armed conflicts that took place between 1910 and 1920. It was aimed at making Mexico a more modern country. It was aimed at making Mexico a more modern country. It was aimed at making Mexico a more modern country.

Reading Study Guide

> Analyzing Art

Analyzing Art

Juárez: Symbol of Mexican Independence

José Clemente Orozco was a rare combination of philosopher and painter. He tried to present events realistically and to represent their true meaning. He said, “No artist has or ever has had political convictions of any sort. Those who profess them are not artists.”

SKILLBUILDER Answers

- 1. Contrasting** *Possible Answer:* The imperialists look old, small, and troubled by the burden of the emperor’s body. The forces of independence look young, strong, and ready to fight.
- 2. Drawing Conclusions** *Possible Answer:* Orozco looked on Juárez as a great hero and a symbol of Mexican independence.

More About . . .

Benito Juárez

Benito Juárez was a member of the Zapotec, a farming people known for their pottery and crafts. The Zapotec felt they could count on Juárez. When he was inaugurated governor of Oaxaca, a group of Zapotec gave him a petition that said, “You know what we need and you will give it to us, for you are good and will not forget that you are one of us.”

Vocabulary Note: Pronunciation

Oaxaca is pronounced wuh•HAH•kah.

Juárez: Symbol of Mexican Independence

In 1948, more than 75 years after Benito Juárez’s death, Mexican mural painter José Clemente Orozco celebrated him in the fresco *Juárez, the Church and the Imperialists*. A portrait of Juárez, which accentuates his Indian features, dominates the work. The supporters of Emperor Maximilian, carrying his body, are shown below Juárez. To either side of Juárez, the soldiers of Mexican independence prepare to attack these representatives of imperialism. By constructing the fresco in this way, Orozco seemed to suggest that Juárez was both a symbol of hope and a rallying cry for Mexican independence.

SKILLBUILDER: Interpreting Visual Sources

- 1. Contrasting** *How is Orozco’s portrayal of the imperialists different from his portrayal of the forces of independence?*
- 2. Drawing Conclusions** *Based on this fresco, how do you think Orozco felt about Benito Juárez?*



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*. Its major goals were redistribution of land, separation of church and state, and increased educational opportunities for the poor. In 1853, however, Santa Anna sent Juárez and other leaders of *La Reforma* into exile.

Just two years later, a rebellion against Santa Anna brought down his government. Juárez and other exiled 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:

PRIMARY SOURCE

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

Not surprisingly, Arriaga’s ideas and those of the other liberals in government threatened most conservative upper-class Mexicans. Many conservatives responded

B. Answer the unequal distribution of land and extreme poverty of many Mexican peasants

MAIN IDEA

Analyzing Primary Sources

What does Ponciano Arriaga think is Mexico’s greatest problem?

DIFFERENTIATING INSTRUCTION: STRUGGLING READERS

Identifying Problems That Affected Mexico

Class Time 45 minutes

Task Charting problems and the people affected by them

Purpose To understand main ideas and conflicts in history

Instructions Explain that identifying problems in history means determining the difficulties faced by a group of people at a certain time. Ask pairs of students to identify one problem from each of the parts in this section. Students should name people who were affected by the problem or tried to solve it. While there may be several problems mentioned, encourage students to find and focus on main ideas. Encourage students to use headlines, images, and captions as guides to finding main ideas. Have students record their answers in a chart like this one.

Title of Part	Problem	People Involved
<i>Santa Anna and the Mexican War</i>	<i>The United States took control of Texas.</i>	<i>Mexicans, Texans, Americans</i>
<i>Juárez and La Reforma</i>	<i>Juárez worked for reforms in government.</i>	<i>Peasants, Catholic Church, landowners</i>
<i>Porfirio Díaz and “Order and Progress”</i>	<i>Díaz became a dictator.</i>	<i>Peasants, landowners, businesspeople</i>
<i>The Revolution and Civil War</i>	<i>Leaders struggled for power.</i>	<i>Peasants, farmers, landowners</i>

Revolution and Civil War

10.4.4

Critical Thinking

- What event was responsible for Madero's calling for a revolution? (*his arrest and exile by Díaz*)
- What does "revolutionary" mean in reference to the Mexican Constitution? (*The constitution was a radical change from the past.*)

History Makers

Emiliano Zapata

Why do you think revolutionaries like Zapata were important to the Mexican Revolution? (*Possible Answer: Without strong, courageous people, real change may not occur.*)

Zapata spent much time working for reform in practical ways as well as on the battlefield. He established the country's first agricultural credit union, called the Rural Loan Bank, and tried to organize cooperatives for large sugar companies. When he met with a representative of President Wilson in 1915, he sought support from the U.S. government. Wilson had already recognized the Carranza government, and Zapata's request was denied.

In-Depth Resources: Unit 3

- from *The Plan of Ayala*, p. 82

INTEGRATED TECHNOLOGY

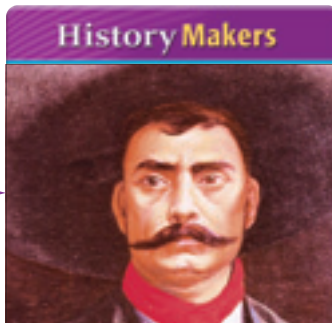
Rubric Biographical dictionaries should include

- all significant figures in the Revolution.
- specific achievements.
- important dates.

however. The wealthy acquired more and more land, which they did not put to good use. As a result, food costs rose steadily. Most Mexicans remained poor farmers and workers, and they continued to grow poorer. 📺

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 handpicked political allies spoke out for reform. A variety of political parties opposed to Díaz began to form. Among the most powerful was a party led by Francisco Madero.



Emiliano Zapata 1879–1919

Shortly after Francisco Madero took office, he met with Emiliano Zapata, one of his leading supporters. Madero's reluctance to quickly enact real land reform angered Zapata. He left the meeting convinced that Madero was not the man to carry through the Mexican Revolution.

A few days later, Zapata issued the Plan of Ayala. This called for the removal of Madero and the appointment of a new president. The plan also demanded that the large landowners give up a third of their land for redistribution to the peasants. Zapata's rallying cry, "Land and Liberty," grew out of the Plan of Ayala.

When Venustiano Carranza ordered Zapata's assassination, he expected Zapata's revolutionary ideas on land reform to die with him. However, they lived on and were enacted by Alvaro Obregón, a follower of Zapata, who seized power from Carranza in 1920.

INTEGRATED TECHNOLOGY

INTERNET ACTIVITY Create a short biographical dictionary of leaders of the Mexican Revolution. Go to classzone.com for your research.

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, 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. However, his policies were seen as too liberal by some and not revolutionary enough by others. Some of those who had supported Madero, including Villa and Zapata, took up arms against him. In 1913, realizing that he could not hold on to power, Madero resigned. The military leader General Victoriano Huerta then took over the presidency. Shortly after, Madero was assassinated, probably on Huerta's orders.

Huerta was unpopular with many people, including Villa and Zapata. These revolutionary leaders allied themselves with Venustiano Carranza, another politician who wanted to overthrow Huerta. 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 control of the government and then turned his army on his former revolutionary allies. Both Villa and Zapata continued to fight. In 1919, however, Carranza lured

MAIN IDEA

Recognizing Effects

📺 What effects did Díaz's rule have on Mexico?

C. Answers: political stability, some economic and industrial progress, but increasing poverty for most citizens

COOPERATIVE LEARNING

Creating a Historical Mural

Class Time 45 minutes

Task Creating poster-size murals

Purpose To help students understand Mexico's history

Instructions Divide students into small groups. Each group will create a poster-sized mural depicting an event in Mexican history and write explanatory paragraphs about that event.

Ask each group to choose an important event in Mexican history from this section for a mural subject. Group members should discuss their ideas and make preliminary sketches before they begin their mural. Supply groups with paper or posterboard and paints or markers.

Each group member should also write a paragraph describing the historic event, including his or her opinion about the outcome, and also how he or she contributed to the mural.

Encourage groups to present their murals to the class. Have each group elect a spokesperson to explain why they chose this event and to describe the mural and what it represents. Students may use creative symbols or images to depict attitudes, opinions, events, and outcomes.

Murals and graphics should display an understanding of the important events in Mexican history, show evidence of teamwork, and be clear and neat.

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

SKILLBUILDER: Interpreting Charts

- 1. Making Inferences** Which reforms do you think landowners resented?
- 2. Recognizing Effects** Which reforms benefited workers?

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 above, it promoted education, land reforms, and workers' rights. Carranza did not support the final version of the constitution, however, and in 1920, he was overthrown by one of his generals, Alvaro Obregón.

Although Obregón seized power violently, he did not remain a dictator. Instead, he supported the reforms the constitution called for, particularly land reform. 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, the Institutional Revolutionary Party (PRI), arose. Although the 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.

D. Answer instituting constitutional reforms, stressing education, and promoting nationalism

MAIN IDEA

Summarizing

What were Obregón's accomplishments?

SECTION 4 ASSESSMENT

TERMS & NAMES 1. For each term or name, write a sentence explaining its significance.

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

USING YOUR NOTES

2. Which leader do you think benefited Mexico most? Why? (10.4.4)

Leader	Major Accomplishment

MAIN IDEAS

- In what ways was Santa Anna a typical caudillo? (10.4.4)
- How did Porfirio Díaz change the direction of government in Mexico? (10.4.4)
- How were "Pancho" Villa and Emiliano Zapata different from other Mexican revolutionary leaders? (10.4.4)

CRITICAL THINKING & WRITING

- 6. MAKING INFERENCES** Why might Benito Juárez's rise to power be considered surprising? (10.4.4)
- 7. ANALYZING CAUSES** Why did Villa and Zapata turn against Madero? (10.4.4)
- 8. SUPPORTING OPINIONS** The revision of Mexico's constitution is considered revolutionary. Do you agree with this characterization? Why or why not? (10.4.4)
- 9. WRITING ACTIVITY** **REVOLUTION** Juárez's motto was "Liberty, Order, and Progress." Díaz's slogan was "Order and Progress." Write an **expository essay** explaining what this difference in goals meant for the people of Mexico. (Writing 2.3.b)

CONNECT TO TODAY **DESIGNING A CAMPAIGN POSTER**

Conduct research on the Institutional Revolutionary Party (PRI) today, particularly its political platform. Use your findings to design a **campaign poster** for the PRI in an upcoming election. (10.4.4)

Transformations Around the Globe 393

History from Visuals

Interpreting the Chart

Before students read the chart, have them cover the text of the chart and just look at the column heads. What reforms do they think might have taken place? Then have them compare the actual reforms with their predictions.

Extension Suggest that interested students find out when Mexican women gained the right to vote and what other legal rights Mexican women have gained since 1917.

SKILLBUILDER **Answers**

- 1. Making Inferences** breakup of large estates, restrictions on land ownership, nationalization of resources
- 2. Recognizing Effects** minimum wage, right to strike, labor unions, equal pay for equal work

World Art and Cultures Transparencies

- AT62 *Distribution of the Land*

3 ASSESS

SECTION 3 ASSESSMENT

Have students work in pairs to complete item 2.

Formal Assessment

- Section Quiz, p. 210

4 RETEACH

Use the Visual Summary to review this section and chapter.

Critical Thinking Transparencies

- CT64 Chapter 28 Visual Summary

In-Depth Resources: Unit 3

- Reteaching Activity, p. 93

ANSWERS

1. Antonio López de Santa Anna, p. 388 • Benito Juárez, p. 389 • *La Reforma*, p. 390 • Porfirio Díaz, p. 391 • Francisco Madero, p. 392 • "Pancho" Villa, p. 392 • Emiliano Zapata, p. 392

2. **Sample Answer:** Juárez—Land, education reform. Madero—Revolution. Carranza—Revised constitution. Obregón—Land reform. Benefited Mexico most—Obregón, because reforms united various peoples of Mexico.
3. gained fame as a military leader; backed by military; aligned with upper classes; concerned with maintaining power
4. rejected reform, favored strict order

5. Both were poor peasants; other leaders were upper-class and well-educated or from the military
6. poor, Indian background; lawyer (other leaders from military)
7. They believed his policies were not revolutionary enough.
8. **Possible Answer:** Yes—It introduced reforms not addressed by former governments.

9. **Rubric** Expository essays should
 - consider accomplishments of each.
 - note loss of political freedom that resulted from Díaz's policies.

CONNECT TO TODAY

- Rubric** Campaign posters should
- convey the political goals of the PRI.
 - use persuasive language and effective visuals.