



Module 6

U.S. Imperialism



Essential Question

Did American imperialism have a positive or negative impact on the world and the United States?

About the Painting: This painting depicts Theodore Roosevelt leading the Rough Riders in the fight for Cuba's freedom on San Juan Hill. Though the painting shows the troops on horseback, they actually fought on foot.

In this module you will learn about factors that influenced U.S. imperialism, and about the transformation of the United States into a world power.

What You Will Learn . . .

Lesson 1: Imperialism and America 280
The Big Idea Beginning in 1867 and continuing through the century, global competition caused the United States to expand.

Lesson 2: The Spanish-American War 286
The Big Idea In 1898 the United States went to war to help Cuba win its independence from Spain.

Lesson 3: Acquiring New Lands 293
The Big Idea In the early 1900s the United States engaged in conflicts in Puerto Rico, Cuba, and the Philippines.

Lesson 4: America as a World Power 301
The Big Idea The Russo-Japanese War, the Panama Canal, and the Mexican Revolution added to America's military and economic power.

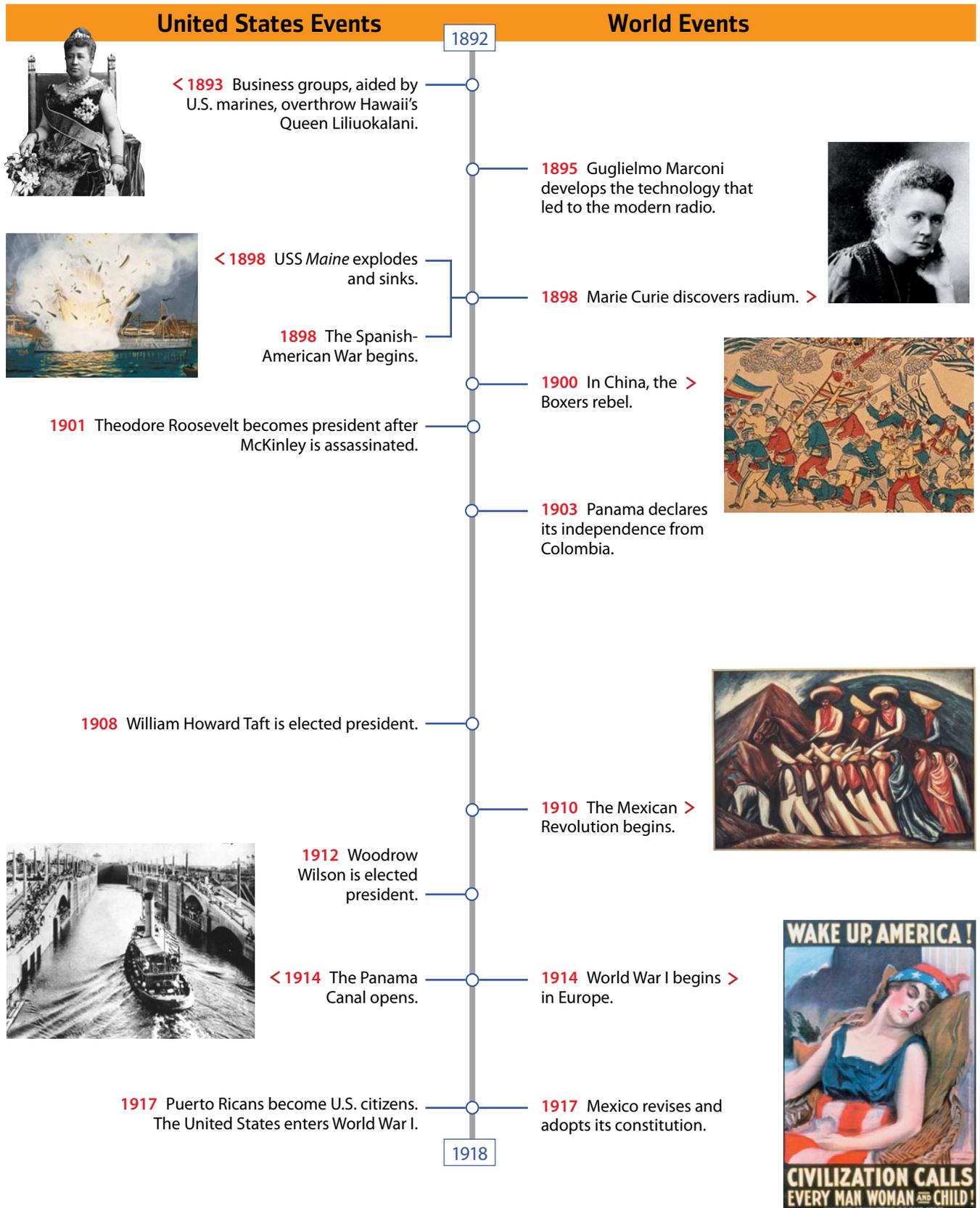
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Imperialism and America

The Big Idea

Beginning in 1867 and continuing through the century, global competition caused the United States to expand.

Why It Matters Now

During this time period, the United States acquired Hawaii and Alaska, both of which became states in 1959.

Key Terms and People

Queen Liliuokalani

imperialism

Alfred T. Mahan

William Seward

Pearl Harbor

Sanford B. Dole

One American's Story

In 1893 **Queen Liliuokalani** (lə-lē'ə-ō-kə-lä'nē) realized that her reign in Hawaii had come to an end. More than 160 U.S. sailors and marines stood ready to aid the *haoles* (white foreigners) who planned to overthrow the Hawaiian monarchy. In an eloquent statement of protest, the proud monarch surrendered to the superior force of the United States.

"I, Liliuokalani, . . . do hereby solemnly protest against any and all acts done against myself and the constitutional government of the Hawaiian Kingdom. . . . Now, to avoid any collision of armed forces and perhaps the loss of life, I do under this protest . . . yield my authority until such time as the Government of the United States shall . . . undo the action of its representatives and reinstate me in the authority which I claim as the constitutional sovereign of the Hawaiian Islands."

—Queen Liliuokalani, quoted in *Those Kings and Queens of Old Hawaii*



Hawaii's "Queen Lil" announced that if restored to power, she would behead those who had conspired to depose her.

U.S. ambassador to Hawaii John L. Stevens informed the State Department, "The Hawaiian pear is now fully ripe, and this is the golden hour for the United States to pluck it." The annexation of Hawaii was only one of the goals of America's empire builders in the late 19th century.

American Expansionism

Americans had always sought to expand the size of their nation, and throughout the 19th century they extended their control toward the Pacific Ocean. Their successes in increasing trade and expanding territory in the 1840s and 1850s eventually led to even greater efforts to spread U.S. influence around the world.



This Japanese print shows the arrival of Commodore Perry's warships in Japan.

EARLY ENCOUNTERS As the United States expanded west in the mid-19th century, new port cities on the Pacific coast gave the nation the opportunity to expand its global trade network as well. The potential for profits from trade with China and Japan motivated U.S. officials to extend the country's reach into the Pacific and attempt to formalize diplomatic relations. Though China initially resisted trade with Westerners, in the 1840s U.S. officials signed the Treaty of Wangxia to protect U.S. business interests in the region.

Like China, Japan was resistant to trade with Western nations. Though British, French, Russian, and American ships occasionally anchored off the Japanese coast, Japan repeatedly refused to meet with their representatives. However, the appeal of trade with Japan proved too great for the United States to give up. In addition to wanting to open Japanese ports to trade, the United States also wanted to secure vital coaling stations that could be used to refuel U.S. trade ships and warships in the Pacific.

On July 8, 1853, Commodore Matthew Perry sailed into Tokyo Bay with four warships to open negotiations with the Japanese. This thinly veiled threat of military force convinced the Japanese government to negotiate. The next year, the two countries signed the Treaty of Kanagawa, which opened up two Japanese ports for refueling. In 1858 Japan signed the Harris Treaty, opening its ports to trade.

At the same time, some Americans were also looking for ways to increase U.S. involvement and territory in Central America and the Caribbean. They had little success until the Mexican-American War. After the land gains of the 1840s and 1850s, the idea of increasing U.S. territory appealed to many Americans. Over time, more and more Americans began to side with the interventionists, or those willing to interfere with the economic, political, or social affairs of other nations. By the 1880s U.S. leaders were convinced that the United States should join the imperialist powers of Europe, establishing overseas colonies and spreading America's global influence. **Imperialism**—the policy in which stronger nations extend their economic, political, or military control over weaker territories—was already a trend around the world.

GLOBAL COMPETITION European nations had been establishing colonies for centuries. In the late 19th century, Africa had emerged as a prime target of European expansionism. By the early 20th century, only two countries in all of Africa—Ethiopia and Liberia—remained independent.

Imperialists also competed for territory in Asia, especially in China. In its late 19th-century reform era, Japan replaced its old feudal order with a strong central government. Hoping that military strength would bolster industrialization, Japan joined European nations in competition for China in the 1890s.

Alfred T. Mahan (1840–1914)

Alfred T. Mahan joined the U.S. Navy in the late 1850s and served for nearly 40 years. In 1886 he became president of the newly established Naval War College in Newport, Rhode Island.

Throughout his lifetime, Mahan was one of the most outspoken advocates of American military expansion. In his book *The Influence of Sea Power upon History, 1660–1783* (published in 1890), Mahan called for the United States to develop a modern fleet capable of protecting American business and shipping interests around the world.



He also urged the United States to establish naval bases in the Caribbean, to construct a canal across the Isthmus of Panama, and to acquire Hawaii and other Pacific islands.

Feelings of nationalism, or national pride, in the United States grew as well. Many Americans believed in the superiority of America's political and cultural ideals. With a belief in manifest destiny, they already had pushed the U.S. border to the Pacific Ocean. Spreading America's ideals overseas was the next logical step. As Americans gradually warmed to the idea of overseas expansion, three factors fueled the new American imperialism:

- desire for military strength
- thirst for new markets
- belief in cultural superiority

DESIRE FOR MILITARY STRENGTH Seeing that other nations were establishing a global military presence, American leaders advised that the United States build up its own military strength. One such leader was Admiral **Alfred T. Mahan** of the U.S. Navy. Mahan urged government officials to build up American naval power in order to compete with other powerful nations. As a result of the urging of Mahan and others, the United States built nine steel-hulled cruisers between 1883 and 1890. The construction of modern battleships such as the *Maine* and the *Oregon* transformed the country into the world's third-largest naval power.

THIRST FOR NEW MARKETS In the late 19th century, advances in technology enabled American farms and factories to produce far more than American citizens could consume. For example, plows, harrows, threshing machines, and reapers increased corn production by 264 percent and the wheat harvest by 252 percent. Now the United States needed raw materials for its factories and new markets for its agricultural and manufactured goods. Imperialists viewed foreign trade as the

In the early 1900s the Navy's Great White Fleet, so named because its ships were painted white, was a sign of America's growing military power.



Vocabulary

xenophobia an unreasonable dislike or fear of people from another country

Reading Check

Analyze Effects

How did domestic tensions, such as overproduction, unemployment, racism, and the closing of the United States frontier to westward expansion, affect thoughts about imperialism?

Reading Check

Analyze Motives

How did time prove that the purchase of Alaska was not an act of folly?

solution to American overproduction and the related problems of unemployment and economic depression. They felt that a worldwide trade network anchored by U.S. colonies and trading posts could provide the country with the economic growth it needed.

BELIEF IN CULTURAL SUPERIORITY Cultural factors also were used to justify imperialism. The same xenophobia that helped pass the Chinese Exclusion Act in 1882, and led to its renewal in 1892 and 1902, fueled imperialist ideas about foreign nations. Some Americans combined the philosophy of Social Darwinism—a belief that free-market competition would lead to the survival of the fittest—with a belief in the racial superiority of Anglo-Saxons. They argued that the United States had a responsibility to spread Christianity and democracy to “civilize” the world’s “inferior peoples.” This viewpoint narrowly defined “civilization” according to the standards of only one culture.

The United States Acquires Alaska

An early supporter of American expansion was **William Seward**, Secretary of State under presidents Abraham Lincoln and Andrew Johnson. In 1867 Seward arranged for the United States to buy Alaska from the Russians for \$7.2 million. Seward had some trouble persuading the House of Representatives to approve funding for the purchase. Some people thought it was silly to buy what they called “Seward’s Icebox” or “Seward’s folly.” Time showed how wrong they were. In 1959 Alaska became a state. For about two cents an acre, the United States had acquired a land rich in timber, minerals, and, as it turned out, oil.

Document-Based Investigation Historical Source

Buying and Selling Alaska

While leaders in the United States government debated whether to buy Alaska, Russian officials were having a similar debate about the sale of their colony.

Analyze Historical Sources

What reservations does Grand Duke Konstantin have about the United States’ interest in Alaska?

“In view of the straitened circumstances of State finances . . . I think we would do well to take advantage of the excess of money . . . in the Treasury of the United States of America and to sell our North American colonies. . . . we must not deceive ourselves and must foresee that the United States, . . . desiring to dominate undividedly the whole of North America, will take the . . . colonies from us and we shall not be able to regain them. . . . At the same time these colonies bring us very small profit and their loss to us would not be greatly felt. . . . These considerations I beg Your Excellency to report to His Majesty the Emperor.”

—Grand Duke Konstantin, from a letter to Prince A.M. Gorchakov, March 22, 1857

The United States Takes Hawaii

In 1867, the same year in which Alaska was purchased, the United States took over the Midway Islands, which lie in the Pacific Ocean about 1,300 miles north of Hawaii. No one lived on the islands, so the event did not attract much attention.

Hawaii was another question. The Hawaiian Islands had been economically important to the United States for nearly a century. Since the 1790s American merchants had stopped there on their way to China and East India. In the 1820s Yankee missionaries founded Christian schools and churches on the islands. Their children and grandchildren became sugar planters who sold most of their crop to the United States.

THE CRY FOR ANNEXATION In the mid-19th century, American-owned sugar plantations accounted for about three-quarters of the islands' wealth. Plantation owners imported thousands of laborers from Japan, Portugal, and China. By 1900 foreigners and immigrant laborers outnumbered native Hawaiians about three to one.

White planters profited from close ties with the United States. In 1875 the United States agreed to import Hawaiian sugar duty-free. Over the next 15 years, Hawaiian sugar production increased nine times. Then the McKinley Tariff of 1890 provoked a crisis by eliminating the duty-free status of Hawaiian sugar. As a result, Hawaiian sugar growers faced competition in the American market. American planters in Hawaii called for the United States to annex the islands so they wouldn't have to pay the duty.

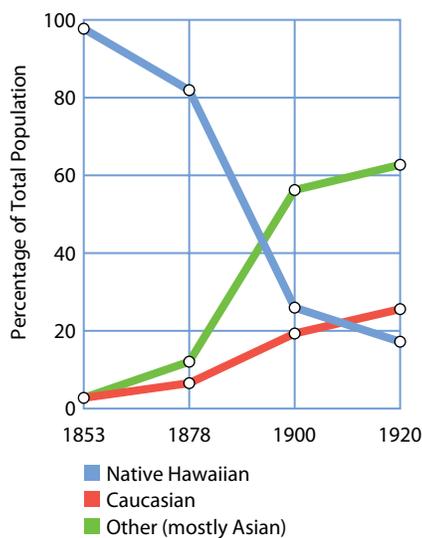
U.S. military and economic leaders already understood the value of the islands. In 1887 they pressured Hawaii to allow the United States to build a naval base at **Pearl Harbor**, the kingdom's best port. The base became a coaling station for refueling American ships.

THE END OF A MONARCHY Also in that year, Hawaii's King Kalakaua had been strong-armed by white business leaders. They forced him to amend Hawaii's constitution, effectively limiting voting rights to only wealthy landowners. But when Kalakaua died in 1891, his sister Queen Liliuokalani came to power with a "Hawaii for Hawaiians" agenda. She proposed removing the property-owning qualifications for voting. To prevent this from happening, business groups—encouraged by Ambassador John L. Stevens—organized a revolution. With the help of marines, they overthrew the queen and set up a government headed by **Sanford B. Dole**.

Vocabulary

annex to incorporate territory into an existing country or state

Hawaii's Changing Population, 1853–1920



Source: Robert C. Schmitt, *Demographic Statistics of Hawaii, 1778-1965*

Interpret Graphs

1. What were the most dramatic changes in Hawaiian population between 1853 and 1920?
2. How might these changes have affected the political climate there?



Interpret Maps

- 1. Location** Where do the Hawaiian Islands lie in relation to the United States?
- 2. Human-Environment Interaction** Given their geographic location, why were Hawaii and Alaska of value to the United States?

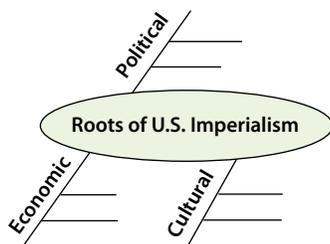
Reading Check
Analyze Events
 What factors led to the annexation of Hawaii in 1898?

President Cleveland directed that the queen be restored to her throne. When Dole refused to surrender power, Cleveland formally recognized the Republic of Hawaii. But he refused to consider annexation unless a majority of Hawaiians favored it.

In 1897 William McKinley, who favored annexation, succeeded Cleveland as president. On August 12, 1898, Congress proclaimed Hawaii an American territory, although Hawaiians had never had the chance to vote. In 1959 Hawaii became the 50th state of the United States.

Lesson 1 Assessment

- 1. Organize Information** Fill in a web diagram with events and concepts that illustrate the roots of imperialism.



Choose one event to explain further in a paragraph.

- 2. Key Terms and People** For each key term or person in the lesson, write a sentence explaining its significance.
- 3. Draw Conclusions** Manifest destiny greatly influenced American policy during the first half of the 19th century. How do you think manifest destiny set the stage for American imperialism at the end of the century?

- 4. Evaluate** In your opinion, did Sanford B. Dole and other American planters have the right to stage a revolt in Hawaii in 1893?

Think About:

- American business interests in Hawaii
- the rights of native Hawaiians

- 5. Analyze Primary Sources** At a meeting of Republicans in 1898, Indiana senator Albert J. Beveridge discussed his views on imperialism.

"Fate has written our policy for us; the trade of the world must and shall be ours. . . . We will establish trading posts throughout the world as distributing points for American products. . . . Great colonies governing themselves, flying our flag and trading with us, will grow about our posts of trade."

How does Beveridge explain the country's need to acquire new territories and expand its worldwide trade network?

The Spanish-American War

The Big Idea

In 1898 the United States went to war to help Cuba win its independence from Spain.

Why It Matters Now

U.S. involvement in Latin America and Asia increased greatly as a result of the war and continues today.

Key Terms and People

José Martí
 Valeriano Weyler
 yellow journalism
 USS *Maine*
 George Dewey
 Rough Riders
 San Juan Hill
 Treaty of Paris

One American's Story

Early in 1896 James Creelman traveled to Cuba as a *New York World* reporter, covering the second Cuban war for independence from Spain. While in Havana, he wrote columns about his observations of the war. His descriptions of Spanish atrocities aroused American sympathy for Cubans.

"No man's life, no man's property is safe [in Cuba]. American citizens are imprisoned or slain without cause. American property is destroyed on all sides. . . . Wounded soldiers can be found begging in the streets of Havana. . . . The horrors of a barbarous struggle for the extermination of the native population are witnessed in all parts of the country. Blood on the roadsides, blood in the fields, blood on the doorsteps, blood, blood, blood! . . . Is there no nation wise enough, brave enough to aid this blood-smitten land?"

—James Creelman, from a *New York World* article, May 17, 1896



Cuban rebels burn the town of Jaruco in March 1896.

Newspapers during that period often exaggerated stories like Creelman's to boost their sales as well as to provoke American intervention in Cuba.

Cubans Rebel Against Spain

By the end of the 19th century, Spain—once the most powerful colonial nation on earth—had lost most of its colonies. It retained only the Philippines and the island of Guam in the Pacific, a few outposts in Africa, and the Caribbean islands of Cuba and Puerto Rico in the Americas.

AMERICAN INTEREST IN CUBA The United States had long held an interest in Cuba, which lies only 90 miles south of Florida. In 1854 diplomats recommended to President Franklin Pierce that the United States buy Cuba from Spain. The Spanish responded by saying that they would rather see Cuba sunk in the ocean.

But American interest in Cuba continued. When the Cubans rebelled against Spain between 1868 and 1878, American sympathies went out to the Cuban people.

The Cuban revolt against Spain was not successful, but in 1886 the Cuban people did force Spain to abolish slavery. After the emancipation of Cuba's slaves, American capitalists began investing millions of dollars in large sugar cane plantations on the island.

THE SECOND WAR FOR INDEPENDENCE Anti-Spanish sentiment in Cuba soon erupted into a second war for independence. **José Martí**, a Cuban poet and journalist in exile in New York, launched a revolution in 1895. Martí organized Cuban resistance against Spain, using an active guerrilla campaign and deliberately destroying property, especially American-owned sugar mills and plantations. Martí counted on provoking U.S. intervention to help the rebels achieve *¡Cuba Libre!*—a free Cuba.

Public opinion in the United States was split. Many business people wanted the government to support Spain in order to protect their investments. Other Americans, however, were enthusiastic about the rebel cause.

Vocabulary
guerrilla a member of a military force that harasses the enemy

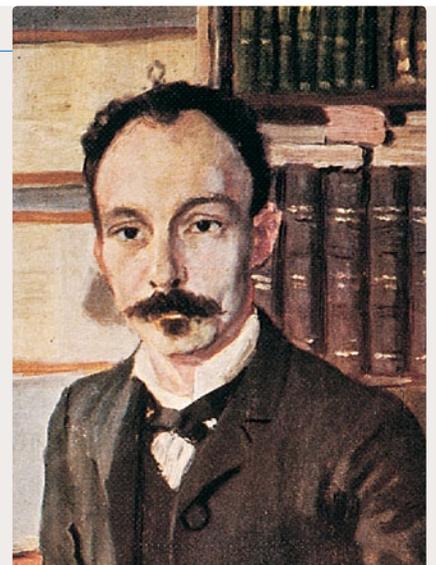
— BIOGRAPHY —

José Martí (1853–1895)

The Cuban political activist José Martí dedicated his life to achieving independence for Cuba. Expelled from Cuba at the age of 16 because of his revolutionary activities, Martí earned a master's degree and a law degree. He eventually settled in the United States.

Wary of the U.S. role in the Cuban struggle against the Spanish, Martí warned, "I know the Monster, because I have lived in its lair." His fears of U.S. imperialism turned out to have been well-founded. U.S. troops occupied Cuba on and off from 1906 until 1922.

Martí died fighting for Cuban independence in 1895. He is revered today in Cuba as a hero and martyr.



Reading Check

Analyze Motives

Why did José Martí encourage Cuban rebels to destroy sugar mills and plantations?

The cry “¡Cuba Libre!” was, after all, similar in sentiment to Patrick Henry’s “Give me liberty or give me death!” Despite economic concerns and public opinion, President Grover Cleveland remained true to the Monroe Doctrine, which promised that the United States would not intervene in the affairs of existing European colonies in the Western Hemisphere. Soon, though, the promises of the Monroe Doctrine would be put to the test.

War Fever Escalates

In 1896 Spain responded to the Cuban revolt by sending General **Valeriano Weyler** to Cuba to restore order. Weyler tried to crush the rebellion by herding the entire rural population of central and western Cuba into barbed-wire concentration camps. Here, civilians could not give aid to rebels. An estimated 300,000 Cubans filled these camps, where thousands died from hunger and disease.

HEADLINE WARS Weyler’s actions fueled a war over newspaper circulation that had developed between the American newspaper tycoons William Randolph Hearst and Joseph Pulitzer. To lure readers, Hearst’s *New York Journal* and Pulitzer’s *New York World* printed exaggerated accounts—by reporters such as James Creelman—of “Butcher” Weyler’s brutality. Stories of poisoned wells and of children being thrown to the sharks deepened American sympathy for the rebels. This sensational style of writing, which exaggerates the news to lure and enrage readers, became known as **yellow journalism**.

Hearst and Pulitzer fanned war fever. When Hearst sent the gifted artist Frederic Remington to Cuba to draw sketches of reporters’ stories, Remington informed the publisher that a war between the United States and Spain seemed very unlikely. Hearst reportedly replied, “You furnish the pictures and I’ll furnish the war.”

THE DE LÔME LETTER American sympathy for “¡Cuba Libre!” grew with each day’s headlines. When President William McKinley took office in 1897, demands for American intervention in Cuba were on the rise. Preferring to avoid war with Spain, McKinley tried diplomatic means to resolve the crisis. At first his efforts appeared to succeed. Spain recalled General Weyler, modified the policy regarding concentration camps, and offered Cuba limited self-government.

In February 1898, however, the *New York Journal* published a private letter written by Enrique Dupuy de Lôme, the Spanish minister to the United States. A Cuban rebel had stolen the letter from a Havana post office and leaked it to the newspaper, which was thirsty for scandal. The de Lôme letter criticized President McKinley, calling him “weak” and “a bidder for the admiration of the crowd.” The embarrassed Spanish government apologized, and the minister resigned. Still, Americans were angry over the insult to their president.

THE USS MAINE EXPLODES Only a few days after the publication of the de Lôme letter, American resentment toward Spain turned to outrage. Early in 1898 President McKinley had ordered the **USS Maine** to Cuba to bring home

Reading Check
Summarize What events increased the tension between the United States and Spain?

American citizens in danger from the fighting and to protect American property. On February 15, 1898, the ship blew up in the harbor of Havana. More than 260 men were killed.

At the time, no one really knew why the ship exploded; however, American newspapers claimed that the Spanish had blown up the ship. The *Journal's* headline read “The warship *Maine* was split in two by an enemy’s secret infernal machine.” Hearst’s paper offered a reward of \$50,000 for the capture of the Spaniards who supposedly had committed the outrage.

The de Lôme letter and the constant stream of sensational headlines helped feed a growing jingoism, or extreme patriotism. When combined with the explosion of the *Maine*, these events had many Americans demanding war with Spain.

War with Spain Erupts

Until this time, the United States had remained largely isolationist, favoring a policy of avoiding foreign entanglements. Now there was no holding back the forces that wanted war. “Remember the *Maine!*” became the rallying cry for U.S. intervention in Cuba. It made no difference that the Spanish government agreed, on April 9, to almost everything the United States demanded, including a six-month cease-fire.

Despite the Spanish concessions, public opinion favored war. On April 11 McKinley asked Congress for authority to use force against Spain. After a week of debate, Congress agreed. On April 20 the United States declared war.

THE WAR IN THE PHILIPPINES The Spanish thought the Americans would invade Cuba. But the first battle of the war took place in a Spanish colony on the other side of the world—the Philippine Islands.

On April 30 the American fleet in the Pacific steamed to the Philippines. The next morning, Commodore **George Dewey** gave the command to open fire on the Spanish fleet at Manila, the Philippine capital. Within hours, Dewey’s men had destroyed every Spanish ship there. Dewey’s victory allowed U.S. troops to land in the Philippines.

Dewey had the support of the Filipinos who, like the Cubans, also wanted freedom from Spain. Over the next two months, 11,000 Americans joined forces with Filipino rebels led by Emilio Aguinaldo. In August Spanish troops in Manila surrendered to the United States.



Spain’s fleet was not prepared to face the might of the U.S. Navy.

THE WAR IN THE CARIBBEAN In the Caribbean, hostilities began with a naval blockade of Cuba. Admiral William T. Sampson effectively sealed up the Spanish fleet in the harbor of Santiago de Cuba.

Dewey’s victory at Manila had demonstrated the superiority of United States naval forces. In contrast, the army maintained only a small professional force, supplemented by a larger, inexperienced, and ill-prepared volunteer force. About 125,000 Americans had volunteered to fight. The new soldiers were sent to training camps that lacked adequate supplies and effective leaders. Moreover, there were not enough modern guns to go around, and

The Spanish-American War, 1898



Interpret Maps

- 1. Location** Where does Cuba lie in relation to the United States?
- 2. Location** Look at the location of the Philippines. How does the map help explain why Spain was surprised by the American attack in the Philippines?

Background

The Rough Riders trained as cavalry but fought on foot because their horses didn't reach Cuba in time.

the troops were outfitted with heavy woolen uniforms unsuitable for Cuba's tropical climate. In addition, the officers—most of whom were Civil War veterans—had a tendency to spend their time recalling their war experiences rather than training the volunteers.

ROUGH RIDERS Despite these handicaps, American forces landed in Cuba in June 1898 and began to converge on the port city of Santiago. The army of 17,000 included four African American regiments of the regular army and the **Rough Riders**, a volunteer cavalry under the command of Leonard Wood and Theodore Roosevelt. Roosevelt, a New Yorker, had given up his job as assistant secretary of the navy to lead the group of volunteers. He would later become president of the United States.

The most famous land battle in Cuba took place near Santiago on July 1. The first part of the battle, on nearby Kettle Hill, featured a dramatic uphill charge by the Rough Riders and two African American regiments, the Ninth and Tenth Cavalries. Their victory cleared the way for an infantry attack on the strategically important **San Juan Hill**. Although Roosevelt and his units played only a minor role in the second victory, U.S. newspapers declared him the hero of San Juan Hill.

Two days later, the Spanish fleet tried to escape the American blockade of the harbor at Santiago. The naval battle that followed, along the Cuban coast, ended in the destruction of the Spanish fleet. On the heels of this victory, American troops invaded Puerto Rico on July 25.

TREATY OF PARIS The United States and Spain signed an armistice, a cease-fire agreement, on August 12, ending what Secretary of State John Hay called “a splendid little war.” The actual fighting in the war had lasted only 15 weeks.

On December 10, 1898, the United States and Spain met in Paris to agree on a treaty. At the peace talks, Spain freed Cuba and turned over the islands of Guam in the Pacific and Puerto Rico in the West Indies to the United States. Spain also sold the Philippines to the United States for \$20 million.

DEBATE OVER THE TREATY The **Treaty of Paris** touched off a great debate in the United States. Arguments centered on whether or not the United States had the right to annex the Philippines, but imperialism was the real issue.

Document-Based Investigation Historical Source

Interventionists vs. Noninterventionists

The issue of whether to annex the Philippines was part of a larger debate about U.S. imperialism. The novelist and anti-imperialist Mark Twain questioned the motives for U.S. intervention around the world in a satirical piece written in 1901. At a meeting of the Republican Party, Indiana senator Albert Beveridge made a case in favor of global intervention.

“Shall we go on conferring our Civilization upon the peoples that sit in darkness, or shall we give those poor things a rest? . . . Extending the Blessings of Civilization to our Brother who Sits in Darkness has been a good trade and has paid well, on the whole; and there is money in it yet . . . but not enough, in my judgment, to make any considerable risk advisable.”

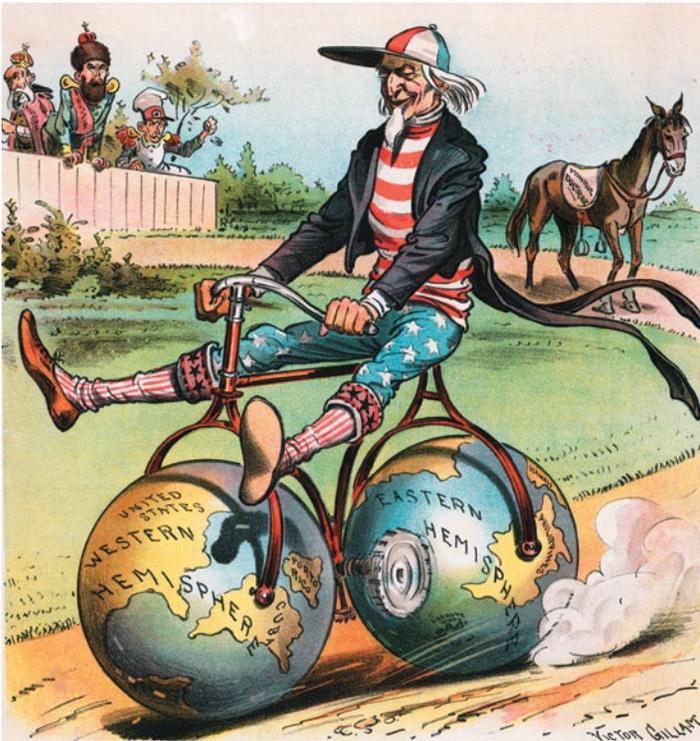
—Mark Twain, quoted in
To the Person Sitting in Darkness

“The Opposition tells us that we ought not to govern a people without their consent. . . . Would not the people of the Philippines prefer the just, humane, civilizing government of this Republic to the savage, bloody rule of pillage and extortion from which we have rescued them? Do not the blazing fires of joy and the ringing bells of gladness in Porto Rico prove the welcome of our flag? . . . do we owe no duty to the world? . . . Shall we abandon them, with Germany, England, Japan, hungering for them?”

—Albert Beveridge, from the March of the Flag speech,
September 16, 1898

Analyze Historical Sources

1. What reasons does Beveridge give for a foreign policy of intervention?
2. Why do you think Twain opposes intervention?



This lithograph criticizes American foreign policy in 1898. In the cartoon, Uncle Sam is riding a bicycle with wheels labeled “western hemisphere” and “eastern hemisphere.” He has abandoned his horse, on whose saddle appears “Monroe Doctrine,” because the horse is too slow.

Reading Check

Summarize What were the terms of the Treaty of Paris?

question was settled with the Senate’s approval of the Treaty of Paris. The United States now had an empire that included Guam, Puerto Rico, and the Philippines. The next question Americans faced was how and when the United States would add to its dominion.

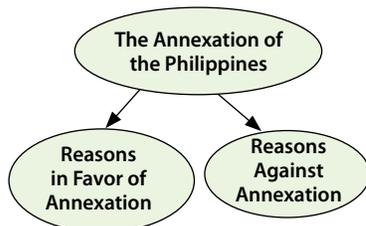
President McKinley told a group of Methodist ministers that he had prayed for guidance on Philippine annexation and had concluded “that there was nothing left for us to do but to take them all [the Philippine Islands], and to educate the Filipinos, and uplift and Christianize them.” McKinley’s need to justify imperialism may have clouded his memory—most Filipinos had been Christian for centuries.

Other prominent Americans presented a variety of arguments—political, moral, and economic—against annexation. Some felt that the treaty violated the Declaration of Independence by denying self-government to the newly acquired territories. The African American educator Booker T. Washington argued that the United States should settle race-related issues at home before taking on social problems elsewhere. The labor leader Samuel Gompers feared that Filipino immigrants would compete for American jobs.

On February 6, 1899, the annexation

Lesson 2 Assessment

- Organize Information** In 1898 a debate raged in the United States over whether the United States had the right to annex the Philippines. Use a graphic organizer to summarize the pros and cons of this debate.



Which side do you support? Why?

- Key Terms and People** For each key term or person in the lesson, write a sentence explaining its significance.

- Make Inferences** What do you think were the unstated editorial policies of yellow journalism? Support your answer with evidence from the text.

Think About:

- James Creelman’s account of Spanish atrocities against Cubans
- Hearst’s remark to Remington
- the *Journal* headline about the explosion of the battleship *Maine*

- Analyze Effects** Many anti-imperialists worried that imperialism might threaten the American democratic system. How might this happen?

- Draw Conclusions** In 1898 Theodore Roosevelt resigned his post as assistant secretary of the navy to organize the Rough Riders. Why do you think Roosevelt was willing to take this risk? How do you think this decision affected his political career?

Acquiring New Lands

The Big Idea

In the early 1900s the United States engaged in conflicts in Puerto Rico, Cuba, and the Philippines.

Why It Matters Now

Today the United States maintains a strong military and political presence in strategic worldwide locations.

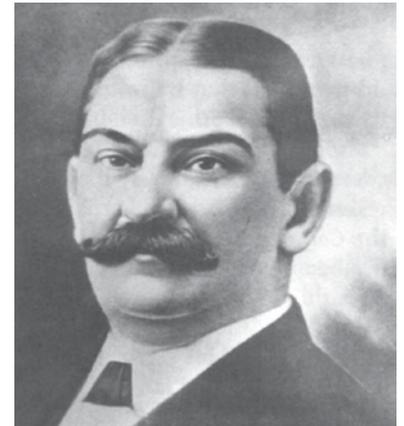
Key Terms and People

Foraker Act
Platt Amendment
protectorate
Emilio Aguinaldo
John Hay
Open Door notes
Boxer Rebellion

One American's Story

When Puerto Rico became part of the United States after the Spanish-American War, many Puerto Ricans feared that the United States would not give them the measure of self-rule that they had gained under the Spanish. Puerto Rican statesman and publisher Luis Muñoz Rivera was one of the most vocal advocates of Puerto Rican self-rule. Between 1900 and 1916, he lived primarily in the United States and continually worked for the independence of his homeland. Finally, in 1916 the U.S. Congress, facing possible war in Europe and wishing to settle the issue of Puerto Rico, invited Muñoz Rivera to speak. On May 5, 1916, Muñoz Rivera stood before the U.S. House of Representatives to discuss the future of Puerto Rico.

“You, citizens of a free fatherland, with its own laws, its own institutions, and its own flag, can appreciate the unhappiness of the small and solitary people that must await its laws from your authority. . . . when you acquire the certainty that you can found in Puerto Rico a republic like that founded in Cuba and Panama . . . give us our independence and you will stand before humanity as . . . a great creator of new nationalities and a great liberator of oppressed peoples.”



Luis Muñoz Rivera

—Luis Muñoz Rivera, quoted in *The Puerto Ricans*

Muñoz Rivera returned to Puerto Rico, where he died in November 1916. Three months later, the United States made Puerto Ricans U.S. citizens.

Ruling Puerto Rico

Not all Puerto Ricans wanted independence, as Muñoz Rivera did. Some wanted statehood, while still others hoped for some measure of local self-government as an American territory. As a result, the United States gave Puerto Ricans no promises regarding independence after the Spanish-American War.

MILITARY RULE During the Spanish-American War, United States forces, under General Nelson A. Miles, occupied the island. As his soldiers took control, General Miles issued a statement assuring Puerto Ricans that the Americans were there to “bring you protection, not only to yourselves but to your property, to promote your prosperity, and to bestow upon you the immunities and blessings of the liberal institutions of our government.” For the time being, Puerto Rico would be controlled by the military until Congress decided otherwise.

RETURN TO CIVIL GOVERNMENT Although many Puerto Ricans had dreams of independence or statehood, the United States had different plans for the island’s future. Puerto Rico was strategically important to the United States, both for maintaining a U.S. presence in the Caribbean and for protecting a future canal that American leaders wanted to build across the Isthmus of Panama. In 1900 Congress passed the **Foraker Act**, which ended military rule and set up a civil government. The act gave the president of the United States the power to appoint Puerto Rico’s governor and members of the upper house of its legislature. Puerto Ricans could elect only the members of the legislature’s lower house.

In 1901 in the *Insular Cases*, the U.S. Supreme Court ruled that the Constitution did not automatically apply to people in acquired territories. Congress, however, retained the right to extend U.S. citizenship, and it granted that right to Puerto Ricans in 1917. It also gave them the right to elect both houses of their legislature.

Reading Check

Analyze Issues Why was Puerto Rico important to the United States?

NOW

&

THEN

Puerto Rico

Ever since their transfer under the Treaty of Paris from Spain to the United States, Puerto Ricans have debated their status, as shown here. In 1967, 1993, and 1998, Puerto Ricans rejected both statehood and independence in favor of commonwealth, a status given the island in 1952.

As members of a commonwealth, Puerto Ricans are U.S. citizens. They can move freely between the island and the mainland and are subjected to the military draft but cannot vote in U.S. presidential elections. A majority of Puerto Ricans have



rejected statehood because they fear it would mean giving up their Latino culture.

Cuba and the United States

When the United States declared war against Spain in 1898, it recognized Cuba's independence from Spain. It also passed the Teller Amendment, which stated that the United States had no intention of taking over any part of Cuba. The Treaty of Paris, which ended the war, further guaranteed Cuba the independence that its nationalist leaders had been demanding for years.

AMERICAN SOLDIERS Though officially independent, Cuba was occupied by American troops when the war ended. José Martí, the Cuban patriot who had led the movement for independence from Spain, had feared that the United States would merely replace Spain and dominate Cuban politics. In some ways, Martí's prediction came true. Under American occupation, the same officials who had served Spain remained in office. Cubans who protested this policy were imprisoned or exiled.

On the other hand, the American military government provided food and clothing for thousands of families, helped farmers put land back into cultivation, and organized elementary schools. Through improvement of sanitation and medical research, the military government helped eliminate yellow fever, a disease that had killed hundreds of Cubans each year.

PLATT AMENDMENT In 1900 the newly formed Cuban government wrote a constitution for an independent Cuba. The constitution, however, did not specify the relationship between Cuba and the United States. Consequently, in 1901 the United States insisted that Cuba add to its constitution several provisions, known as the **Platt Amendment**. The amendment stated that

- Cuba could not make treaties that might limit its independence or permit a foreign power to control any part of its territory,
- the United States reserved the right to intervene in Cuba,
- Cuba was not to go into debt that its government could not repay, and
- the United States could buy or lease land on the island for naval stations and refueling stations.

The United States made it clear that its army would not withdraw until Cuba adopted the Platt Amendment. In response, a torchlight procession marched on the residence of Governor-General Leonard Wood in protest. Some protestors even called for a return to arms to defend their national honor against this American insult. The U.S. government stood firm, though, and Cubans reluctantly ratified the new constitution. In 1903 the Platt Amendment became part of a treaty between the two nations, and it remained in effect for 31 years. Under the terms of the treaty, Cuba became a U.S. **protectorate**, a country whose affairs are partially controlled by a stronger power.

PROTECTING AMERICAN BUSINESS INTERESTS The most important reason for the United States to maintain a strong political presence in Cuba was to protect American businesses. U.S. companies had invested in the island's sugar, tobacco, and mining industries, as well as in its railroads and public utilities.

Background

Dr. Carlos Finlay discovered that yellow fever is carried by mosquitoes. Clearing out the mosquitoes' breeding places helped eliminate the disease in Cuba.

Vocabulary

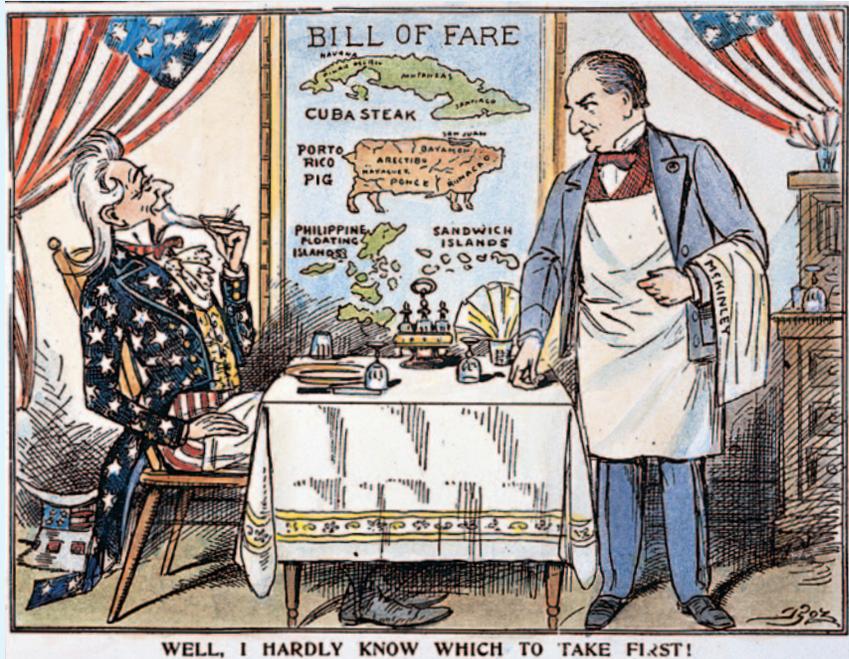
ratify to make valid by approving

U.S. Intervention

Throughout the early 1900s, the United States intervened in the affairs of its Latin American neighbors several times. Not surprisingly, few Latin Americans welcomed United States intervention. As the cartoon shows, the United States had a different point of view.

Analyze Historical Sources

1. Which president does the waiter portray?
2. What is on the bill of fare, or menu, in this restaurant? What seems to be Uncle Sam's attitude toward the offerings on the menu?



Although many businesspeople were convinced that annexing and imposing colonial rule on new territories was necessary to protect American business interests, some were concerned about colonial entanglements. The industrialist Andrew Carnegie voiced his opposition to the taking of nations as colonies.

“The exports of the United States this year [1898] are greater than those of any other nation in the world. Even Britain’s exports are less, yet Britain ‘possesses’ . . . a hundred ‘colonies’ . . . scattered all over the world. The fact that the United States has none does not prevent her products and manufactures from invading . . . all parts of the world in competition with those of Britain.”

—Andrew Carnegie, quoted in *Distant Possessions*

Despite such concerns, the U.S. State Department continued to push for control of its Latin American neighbors. In the years to come, the United States would intervene time and again in the affairs of other nations in the Western Hemisphere.

Filipinos Rebel

In the Philippines, Filipinos reacted with outrage to the Treaty of Paris, which called for American annexation of the Philippines. The rebel leader **Emilio Aguinaldo** (ě-měl’yō ä’gě-näl’dō) believed that the United States had promised independence. When he and his followers learned the terms of the treaty, they vowed to fight for freedom.

Reading Check

Analyze Effects

What were the effects of the American occupation of Cuba?



U.S. military action in the Philippines resulted in suffering for Filipino civilians. About 200,000 people died as a result of malnutrition, disease, and such guerrilla tactics as the burning of villages.

Reading Check
Contrast What were the consequences of the war for Filipinos? for the Americans?

PHILIPPINE–AMERICAN WAR In February 1899 the Filipinos, led by Aguinaldo, rose in revolt. The United States assumed almost the same role that Spain had played, imposing its authority on a colony that was fighting for freedom. When Aguinaldo turned to guerrilla tactics, the United States forced Filipinos to live in designated zones, where poor sanitation, starvation, and disease killed thousands. This was the very same practice that Americans had condemned Spain for using in Cuba.

During the occupation, white American soldiers looked on the Filipinos as inferiors. However, many of the 70,000 U.S. troops sent to the Philippines were African Americans. When African American newspapers questioned why blacks were helping to spread racial prejudice to the Philippines, some African American soldiers deserted to the Filipino side and developed bonds of friendship with the Filipinos.

It took the Americans nearly three years to put down the rebellion. About 20,000 Filipino rebels died fighting for independence. The war claimed 4,000 American lives and cost \$400 million—20 times the price the United States had paid to purchase the islands.

AFTERMATH OF THE WAR After suppressing the rebellion, the United States set up a government similar to the one it had established for Puerto Rico. The U.S. president would appoint a governor, who would then appoint the upper house of the legislature. Filipinos would elect the lower house of the legislature. Under American rule, the island nation moved gradually toward independence. On July 4, 1946, the Philippines finally became an independent republic.

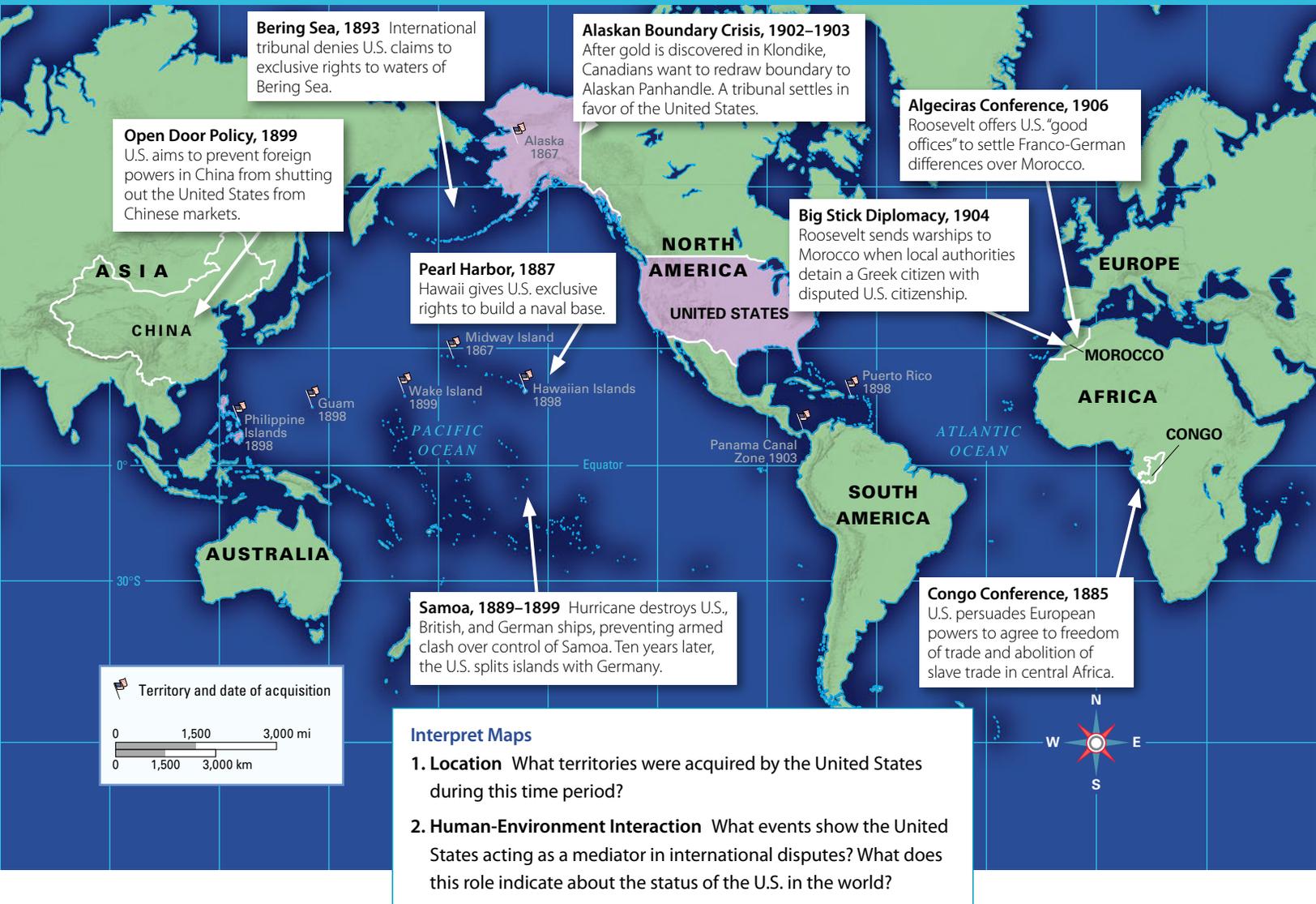
Foreign Influence in China

U.S. imperialists saw the Philippines as a gateway to the rest of Asia, particularly to China. China was seen as a vast potential market for American products. It also presented American investors with new opportunities for large-scale railroad construction.

Weakened by war and foreign intervention, China had become known as the “sick man of Asia.” France, Germany, Britain, Japan, and Russia had established prosperous settlements along the coast of China. They also had carved out spheres of influence, areas where each nation claimed special rights and economic privileges.

JOHN HAY’S OPEN DOOR NOTES The United States began to fear that the other foreign powers would carve China into colonies and American traders would be shut out. To protect American interests, U.S. Secretary of State **John Hay** issued, in 1899, a series of policy statements called the **Open Door notes**. The notes were letters addressed to the leaders of imperialist nations proposing that the nations share their trading rights with the United States. This would create an open door policy, meaning that no single nation would have a monopoly on trade with any part of China. The other imperialist powers reluctantly accepted this policy.

U.S. Imperialism, 1867–1906



Vocabulary

martial arts combat or self-defense arts that originated in East Asia, such as judo or karate

THE BOXER REBELLION IN CHINA Although China kept its freedom, Europeans dominated most of China's large cities. Resentment simmered beneath the surface as some Chinese formed secret societies pledged to rid the country of "foreign devils." The most famous of these secret groups were the Boxers, so named by Westerners because members practiced martial arts.

The Boxers killed hundreds of missionaries and other foreigners, as well as Chinese converts to Christianity. Foreign citizens fled to Beijing to escape the Boxer onslaught. In August 1900 troops from Britain, France, Germany, and Japan joined about 2,500 American soldiers and marched on the Chinese capital. As the foreign armies took back territory, they pushed to secure their spheres of influence within China. Within two months, the international forces put down the **Boxer Rebellion**. Thousands of Chinese people died during the fighting.



During the Boxer Rebellion, shown here in this Chinese print, Chinese patriots demanded that all foreigners be expelled from the country. The Boxers surrounded the European section of Beijing and kept it under siege for several months.

On September 7, 1901, China and 11 other nations signed the Boxer Protocol—a final settlement of the Boxer Rebellion. The Qing government agreed to execute some Chinese officials, to punish others, and to pay about \$332 million in damages. The United States was awarded a settlement of \$24.5 million. It used about \$4 million to pay American citizens for actual losses incurred during the rebellion. In 1908 the U.S. government returned the rest of the money to China to be used for the purpose of educating Chinese students in their own country and in the United States.

PROTECTING AMERICAN RIGHTS After the Boxer Rebellion, the United States feared that European nations would use their victory to take even greater control of China. To prevent this, John Hay issued a second series of Open Door notes, announcing that the United States would “safeguard for the world the principle of equal and impartial trade with all parts of the Chinese Empire.” This policy paved the way for greater American influence in Asia.

The Open Door policy reflected three deeply held American beliefs about the United States industrial capitalist economy. First, Americans believed that the growth of the U.S. economy depended on exports. Second, they felt the United States had a right to intervene abroad to keep foreign markets open. Third, they feared that the closing of an area to American products, citizens, or ideas threatened U.S. survival. These beliefs became the bedrock of American foreign policy.

The Impact of U.S. Territorial Gains

In 1900 Republican William McKinley, a reluctant but confirmed imperialist, was elected to a second term against Democrat William Jennings Bryan, who staunchly opposed imperialism. McKinley’s reelection confirmed that a majority of Americans favored his policies. Under McKinley, the United States had gained an empire.

Reading Check

Analyze Causes

How did the policy statements known as the Open Door notes put an end to spheres of influence in China?

Yet even before McKinley was reelected, an Anti-Imperialist League had sprung into being. The league included some of the most prominent people in America, such as former president Grover Cleveland, industrial leader Andrew Carnegie, labor leader Samuel Gompers, social worker Jane Addams, and many leading writers. Anti-imperialists had different and sometimes conflicting reasons for their opposition. For example, Gompers was concerned about the impact of imperialism on U.S. workers. Carnegie, on the other hand, worried that U.S. imperialism could lead to endless wars with European rivals. All anti-imperialists, though, agreed that it was wrong for the United States to rule other people without their consent. These beliefs were summed up by the vice-president of the New England Anti-Imperialist League, Moorfield Storey.

“We are here to insist that a war begun in the cause of humanity shall not be turned into a war for empire, that an attempt to win for Cubans the right to govern themselves shall not be made an excuse for extending our sway over alien peoples without their consent. The Fundamental principles of our government are at stake.”

—Moorfield Storey, from a speech at Faneuil Hall, Boston, June 15, 1898

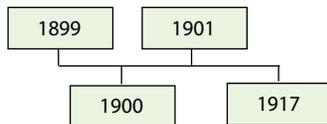
Despite the fame of some anti-imperialists, their pleas fell largely on deaf ears. In the early 20th century, the United States under President Theodore Roosevelt and President Woodrow Wilson would continue to exert its power around the globe.

Reading Check

Analyze Issues Why did some Americans oppose imperialism?

Lesson 3 Assessment

- 1. Organize Information** Create a timeline of key events relating to U.S. relations with Cuba, Puerto Rico, and the Philippines.



Which event do you think was most significant? Why?

- 2. Key Terms and People** For each key term or person in the lesson, write a sentence explaining its significance.
- 3. Evaluate** How did American rule of Puerto Rico harm Puerto Ricans? How did it help Puerto Ricans? Do you think the benefits outweighed the harmful effects? Why or why not?
- 4. Compare** How was U.S. policy toward China different from U.S. policy toward the Philippines? To what can you attribute the difference?
- 5. Analyze Issues** How did U.S. foreign policy at the turn of the century affect actions taken by the United States toward China?

Think About:

- why the United States wanted access to China's markets
- the purpose of the Open Door notes
- the U.S. response to the Boxer Rebellion

America as a World Power

The Big Idea

The Russo-Japanese War, the Panama Canal, and the Mexican Revolution added to America's military and economic power.

Why It Matters Now

American involvement in conflicts around 1900 led to involvement in World War I and later to a peacekeeper role in today's world.

Key Terms and People

Panama Canal
Roosevelt Corollary
dollar diplomacy
Francisco "Pancho" Villa
Emiliano Zapata
John J. Pershing

One American's Story

Joseph Bucklin Bishop, a policy adviser to the canal's chief engineer, played an important role in the building of the **Panama Canal**. As editor of the *Canal Record*, a weekly newspaper that provided Americans with updates on the project, Bishop described a frustrating problem that the workers encountered.

"The Canal Zone was a land of the fantastic and the unexpected. No one could say when the sun went down what the condition of the Cut would be when [the sun] rose. For the work of months or even years might be blotted out by an avalanche of earth or the toppling over of a mountain of rock. It was a task to try men's souls; but it was also one to kindle in them a joy of combat . . . and a faith in ultimate victory which no disaster could shake."



Workers digging the Panama Canal faced hazardous landslides and death from disease.

—Joseph Bucklin Bishop, quoted in *The Impossible Dream: The Building of the Panama Canal*

The building of the Panama Canal reflected America's new role as a world power. As a technological accomplishment, the canal represented a confident nation's refusal to let any physical obstacle stand in its way.

Teddy Roosevelt and the World

The assassination of William McKinley in 1901 thrust Vice-President Theodore Roosevelt into the role of a world leader. Roosevelt was unwilling to allow the imperial powers of Europe to control the world's political and economic destiny. In 1905, building on the Open Door notes to increase American influence in East Asia, Roosevelt mediated a settlement in a war between Russia and Japan.

ROOSEVELT THE PEACEMAKER In 1904 Russia and Japan, Russia's neighbor in East Asia, were both imperialist powers, and they were competing for control of Korea. The Japanese took the first action in what would become the Russo-Japanese War with a sudden attack on the Russian Pacific fleet. To everyone's surprise, Japan destroyed it. Japan then proceeded to destroy a second fleet sent as reinforcement. Japan also won a series of land battles, securing Korea and Manchuria.

As a result of these battles, Japan began to run out of men and money, a fact that it did not want to reveal to Russia. Instead, Japanese officials approached President Roosevelt in secret and asked him to mediate peace negotiations. Roosevelt agreed, and in 1905 Russian and Japanese delegates convened in Portsmouth, New Hampshire.

The first meeting took place on the presidential yacht. Roosevelt had a charming way of greeting people with a grasp of the hand, a broad grin, and a hearty "Dee-lighted." Soon the opposing delegates began to relax and cordially shook hands.

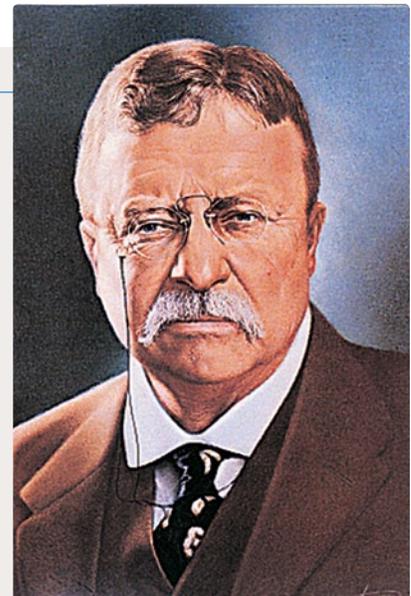
The Japanese wanted Sakhalin Island, off the coast of Siberia, and a large sum of money from Russia. Russia refused. Roosevelt persuaded Japan to accept half the island and forgo the cash payment. In exchange, Russia agreed to let Japan take over Russian interests in Manchuria and Korea. The successful efforts in negotiating the Treaty of Portsmouth won Roosevelt the 1906 Nobel Peace Prize.

— BIOGRAPHY —

Theodore Roosevelt (1858–1919)

Rimless glasses, a bushy mustache, and prominent teeth made Roosevelt easy for cartoonists to caricature. His great enthusiasm for physical activity—boxing, tennis, swimming, horseback riding, and hunting—provided cartoonists with additional material. Some cartoons portrayed Roosevelt with the toy teddy bear that he inspired.

Roosevelt had six children, who became notorious for their rowdy antics. Their father once sent a message through the War Department, ordering them to call off their "attack" on the White House. Roosevelt thrived on the challenges of the presidency. He wrote, "I do not believe that anyone else has ever enjoyed the White House as much as I have."



As U.S. and Japanese interests expanded in East Asia, the two nations continued diplomatic talks. In later agreements, they pledged to respect each other's possessions and interests in East Asia and the Pacific.

PANAMA CANAL By the time Roosevelt became president, many Americans, including Roosevelt, felt that the United States needed a canal cutting across Central America. Such a canal would greatly reduce travel time for commercial and military ships by providing a shortcut between the Atlantic and Pacific oceans. As early as 1850 the United States and Britain had agreed to share the rights to such a canal. In the Hay-Pauncefote Treaty of 1901, however, Britain gave the United States exclusive rights to build and control a canal through Central America.

Engineers identified two possible routes for the proposed canal. One, through Nicaragua, posed fewer obstacles because much of it crossed a large lake. The other route crossed through Panama (then a province of Colombia) and was shorter and filled with mountains and swamps. In the late 1800s a French company had tried to build a canal in Panama. After ten years, the company gave up. It sent an agent, Philippe Bunau-Varilla, to Washington to convince the United States to buy its claim. In 1903 the president and Congress decided to use the Panama route and agreed to buy the French company's route for \$40 million.

Before beginning work on the Panama Canal, the United States had to get permission from Colombia, which then ruled Panama. When these negotiations broke down, Bunau-Varilla helped organize a Panamanian rebellion against Colombia. Aided by a U.S. naval blockade that stopped Colombian troops from landing in Panama, the rebels won independence. On November 3, 1903, nearly a dozen U.S. Navy warships were present as Panama declared its independence from Colombia.

This threat of military force by the United States was a prime example of gunboat diplomacy. Fifteen days later, Panama and the United States signed the Hay-Bunau-Varilla Treaty. The United States agreed to pay Panama \$10 million plus an annual rent of \$250,000 for an area of land across Panama, called the Canal Zone. The United States now controlled the canal route across the Isthmus of Panama and could begin construction on the Panama Canal.

CONSTRUCTING THE CANAL Construction of the Panama Canal ranks as one of the world's greatest engineering feats. Builders fought diseases, such as yellow fever and malaria, and soft volcanic soil, that proved difficult to remove from where it lay. Work began in 1904 with the clearing of brush and draining of swamps. By 1913, the height of the construction, more than 43,400 workers were employed. Some had come from Italy and Spain; three-quarters were blacks from the British West Indies. More than 5,600 workers on the canal died from accidents or disease. The total cost to the United States was about \$380 million.

On August 15, 1914, the canal opened for business, and more than 1,000 merchant ships passed through during its first year. U.S.–Latin American relations, however, had been damaged by American support of the rebellion in Panama. The resulting ill will lasted for decades, despite Congress's paying Colombia \$25 million in 1921 to compensate the country for its lost territory.

Vocabulary
gunboat
diplomacy using
naval power as a
threat to gain an
advantage in foreign
policy negotiations

“The World’s Constable”

This cartoon, drawn by Louis Dalrymple in 1905, shows Teddy Roosevelt implementing his new world diplomacy. The cartoon implies that Roosevelt has the right to execute police power to keep the countries of Europe (shown on the right) out of the affairs of Latin American countries (shown on the left).



Analyze Historical Sources

How does the cartoonist portray President Roosevelt?

THE ROOSEVELT COROLLARY Financial factors drew the United States further into Latin American affairs. In the late 19th century, many Latin American nations had borrowed huge sums from European banks to build railroads and develop industries. Roosevelt feared that if these nations defaulted on their loans, Europeans might intervene. He was determined to make the United States the predominant power in the Caribbean and Central America.

Roosevelt reminded the European powers of the Monroe Doctrine, which had been issued in 1823 by President James Monroe. The Monroe Doctrine demanded that European countries stay out of the affairs of Latin American nations. Roosevelt based his Latin America policy on a West African proverb that said, “Speak softly and carry a big stick.” In his December 1904 message to Congress, Roosevelt added the **Roosevelt Corollary** to the Monroe Doctrine. He warned that disorder in Latin America might “force the United States . . . to the exercise of an international police power.” In effect, the corollary said that the United States would now use force to protect its economic interests in Latin America.

Vocabulary

corollary an additional statement that follows logically from the first one

Reading Check Identify Problems

What problems did canal workers encounter in constructing the Panama Canal?

DOLLAR DIPLOMACY During the next decade, the United States exercised its police power on several occasions. For example, when a 1911 rebellion in Nicaragua left the nation near bankruptcy, President William H. Taft, Roosevelt's successor, arranged for American bankers to loan Nicaragua enough money to pay its debts. In return, the bankers were given the right to recover their money by collecting Nicaragua's customs duties. The U.S. bankers also gained control of Nicaragua's state-owned railroad system and its national bank. When Nicaraguan citizens heard about this deal, they revolted against President Adolfo Díaz. To prop up Díaz's government, some 2,000 marines were sent to Nicaragua. The revolt was put down, but some marine detachments remained in the country until 1933.

The Taft administration followed the policy of using the U.S. government to guarantee loans made to foreign countries by American businesspeople. This policy was called **dollar diplomacy** by its critics and was often used to justify keeping European powers out of the Caribbean.

Woodrow Wilson's Missionary Diplomacy

The Monroe Doctrine, issued by President James Monroe in 1823, had warned other nations against expanding their influence in Latin America. The Roosevelt Corollary asserted, in 1904, that the United States had a right to exercise international police power in the Western Hemisphere. In 1913 President Woodrow Wilson gave the Monroe Doctrine a moral tone.

According to Wilson's "missionary diplomacy," the United States had a moral responsibility to deny recognition to any Latin American government it viewed as oppressive, undemocratic, or hostile to U.S. interests. Prior to this policy, the United States recognized any government that controlled a nation, regardless of that nation's policies or how it had come to power. Wilson's policy pressured nations in the Western Hemisphere to establish democratic governments. Almost immediately, the Mexican Revolution put Wilson's policy to the test.

THE MEXICAN REVOLUTION Mexico had been ruled for more than three decades by a military dictator, Porfirio Díaz. A friend of the United States, Díaz had long encouraged foreign investments in his country. As a result, foreigners, mostly Americans, owned a large share of Mexican oil wells, mines, railroads, and ranches. While foreign investors and some Mexican landowners and politicians had grown rich, the common people of the country were desperately poor.

In 1911 Mexican peasants and workers led by Francisco Madero overthrew Díaz. Later that year Madero was elected president. He promised democratic reforms, but he proved unable to satisfy the conflicting demands of landowners, peasants, factory workers, and the urban middle class. After two years, General Victoriano Huerta took over the government. Within days, Madero was murdered. Wilson refused to recognize the government that Huerta formed. He called it "a government of butchers."

ANOTHER PERSPECTIVE

Intervention in Mexico

Most U.S. citizens supported American intervention in Mexico. Edith O'Shaughnessy, wife of an American diplomat in Mexico City, had another perspective. After touring Veracruz, O'Shaughnessy wrote to her mother:

"I think we have done a great wrong to these people; instead of cutting out the sores with a clean, strong knife of war . . . and occupation, . . . we have only put our fingers in each festering wound and inflamed it further."

INTERVENTION IN MEXICO Wilson adopted a plan of "watchful waiting," looking for an opportunity to act against Huerta. The opportunity came in April 1914, when one of Huerta's officers arrested a small group of American sailors in Tampico, on Mexico's eastern shore. The Mexicans quickly released them and apologized, but Wilson used the incident as an excuse to intervene in Mexico and ordered U.S. Marines to occupy Veracruz, an important Mexican port. Eighteen Americans and at least 200 Mexicans died during the invasion.

The incident brought the United States and Mexico close to war. The three most powerful countries in Latin America, known as the ABC powers—Argentina, Brazil, and Chile—stepped in to mediate the conflict. At the ABC Conference

in Niagara Falls, New York, they proposed that Huerta step down and that U.S. troops withdraw without paying Mexico for damages. Mexico rejected the plan, and Wilson refused to recognize a government that had come to power as a result of violence. The Huerta regime soon collapsed, however, and Venustiano Carranza, a nationalist leader, became president in 1915. Wilson withdrew the troops and formally recognized the Carranza government.

REBELLION IN MEXICO Carranza was in charge, but like others before him, he did not have the support of all Mexicans. Rebels under the leadership of **Francisco "Pancho" Villa** (vē'ə) and **Emiliano Zapata** (ě-měl-yä'nō zə-pä'tə) opposed Carranza's provisional government. Zapata—son of a mestizo peasant—was dedicated to land reform. "It is better to die on your feet than live on your knees," Zapata told the peasants who joined him. Villa, a fierce nationalist, had frequently courted the support and aid of the United States.

"[A]s long as I have anything to do with the affairs in Mexico there will be no further friction between my country and my friends of the north . . . To President Wilson, the greatest American, I stand pledged to do what I can to keep the faith he has in my people, and if there is anything he may wish I will gladly do it, for I know it will be for the good of my country."

—Pancho Villa, quoted in the *New York Times*, January 11, 1915

Despite Villa's talk of friendship, when President Wilson recognized Carranza's government, Villa threatened reprisals against the United States. In January 1916 Carranza invited American engineers to operate mines in northern Mexico. Before they reached the mines, however, Villa's men took the Americans off a train and shot them. Two months later, some of Villa's followers raided Columbus, New Mexico, and killed 17 Americans. Americans held Villa responsible.



Pancho Villa directs a column of his troops through northern Mexico in 1914.

CHASING VILLA With the American public demanding revenge, President Wilson ordered Brigadier General **John J. Pershing** and an expeditionary force of about 15,000 soldiers into Mexico to capture Villa dead or alive. For almost a year, Villa eluded Pershing's forces. Wilson then called out 150,000 National Guardsmen and stationed them along the Mexican border. In the meantime, Mexicans grew angrier over the U.S. invasion of their land. In June 1916 U.S. troops clashed with Carranza's army, resulting in deaths on both sides.

Carranza demanded the withdrawal of U.S. troops, but Wilson refused. War seemed imminent. However, in the end, both sides backed down. The United States, facing war in Europe, needed peace on its southern border. In February 1917 Wilson ordered Pershing to return home. Later that year, Mexico adopted a constitution that gave the government control of the nation's oil and mineral resources and placed strict regulations on foreign investors.

Although Carranza had called for the constitution of 1917, he failed to carry out its measures. Instead, he ruled oppressively until 1920, when a moderate named Alvaro Obregón came to power. Obregón's presidency marked the end of civil war and the beginning of reform.

U.S. intervention in Mexican affairs provided a clear model of American imperialist attitudes in the early years of the 20th century. Americans believed in the superiority of free-enterprise democracy, and the American government attempted to extend the reach of this economic and political system, even through armed intervention.

The United States pursued and achieved several foreign policy goals in the early 20th century. First, it expanded U.S. access to foreign markets in order to ensure the continued growth of the domestic economy. Second, the United States built a modern navy to protect its interests abroad. Third, the United States exercised its international police power to ensure dominance in Latin America.

Reading Check
Analyze Motives
 Why did President Wilson refuse to recognize Huerta's government?

Lesson 4 Assessment

1. Organize Information In a two-column chart, list ways Teddy Roosevelt and Woodrow Wilson used American power around the world during their presidencies.

Using American Power	
Roosevelt	Wilson

Choose one example and discuss its impact with your classmates.

2. Key Terms and People For each key term or person in the lesson, write a sentence explaining its significance.

3. Compare and Contrast What do you think were the similarities and differences between Roosevelt's Big Stick policy and Wilson's missionary diplomacy? Use evidence from the text to support your response.

4. Evaluate In your opinion, should the United States have become involved in the affairs of Colombia, Nicaragua, and Mexico during the early 1900s? Support your answer with details.

Think About:

- the effect of the Roosevelt Corollary
- the results of dollar diplomacy
- the implication of Wilson's missionary diplomacy

The Panama Canal: Linking East and West

By the late 19th century, the U.S. position in global trade was firmly established. A glance at a world map during that time revealed the trade advantages of cutting through the world's great landmasses at two strategic points. The first cut, or canal, through the Isthmus of Suez in Egypt was completed in 1869 and was a spectacular success. A second cut, this one through Panama, in Central America, would be especially advantageous to the United States. Such a cut would substantially reduce the sailing time between the nation's Atlantic and Pacific coasts. This was not only important for trade and travel but also for U.S. national security. During the Spanish-American War, U.S. warships in the Pacific had to sail around South America to join the fighting in the Caribbean. The Panama Canal would solve that problem.

It took the United States ten years, from 1904 to 1914, to build the Panama Canal. By 1999 more than 700,000 vessels, flying the flags of about 70 nations, had passed through its locks. On December 31, 1999, Panama assumed full control of the canal.

INTERCOASTAL TRADE

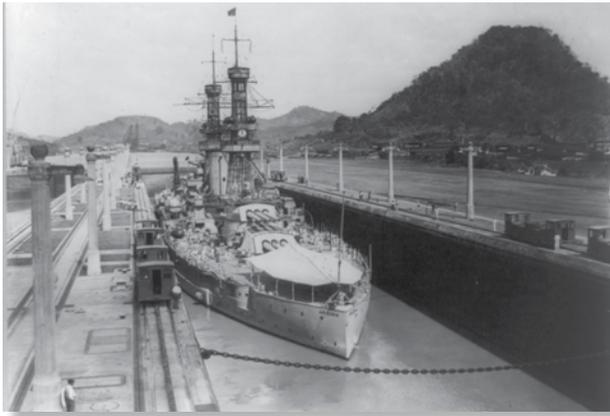
The first boat through the canal heralded the arrival of increased trade between the Atlantic and Pacific ports of the United States. New York City and other U.S. Atlantic ports accounted for about 60 percent of the traffic using the Panama Canal in the early decades of its existence.



NUMBERS TELL THE STORY

A ship sailing from New York to San Francisco by going around South America travels 13,000 miles; the canal shortens the journey to 5,200 miles. Ships must be no more than 106 feet across and 965 feet in length, with a draft (the depth of the vessel below the water line when fully loaded) of no more than 39.5 feet. Each ship pays a toll based on its size, its cargo, and the number of passengers it carries.



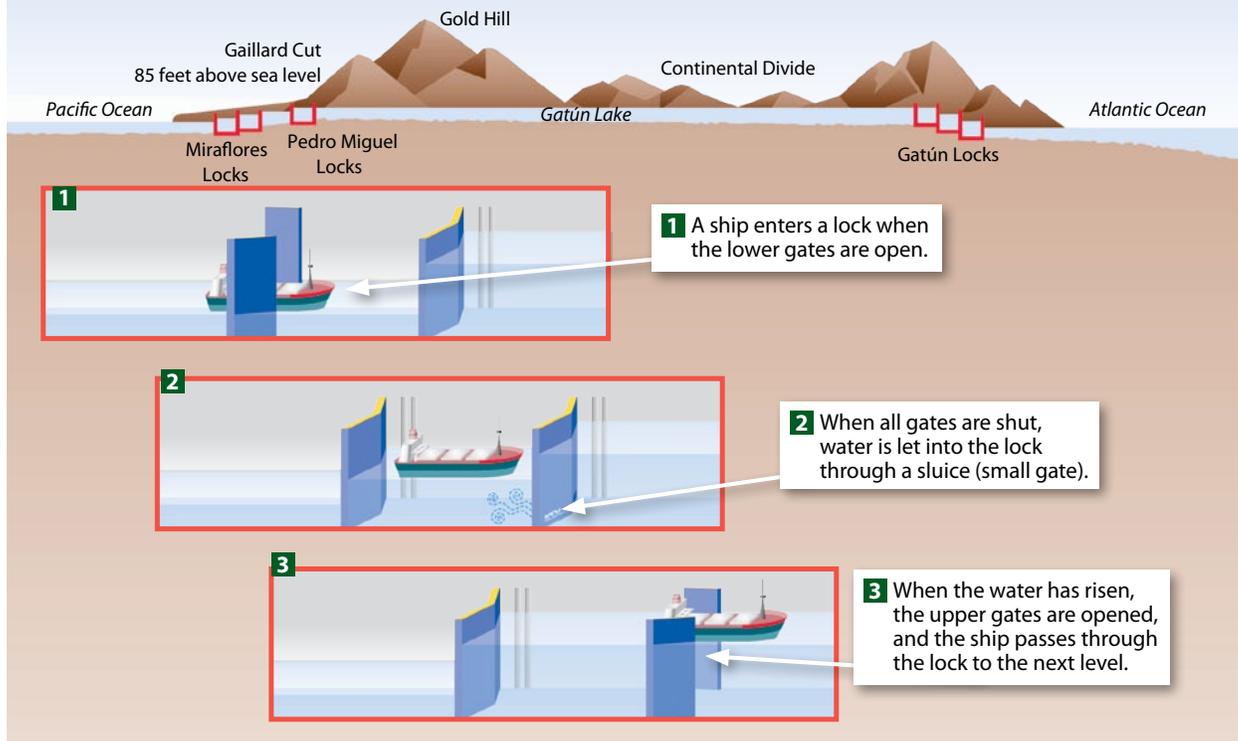


WARSHIPS

The USS *Arizona* passes through the Panama Canal in 1921. In addition to being a valuable trade route, the Panama Canal also provided the U.S. Navy with a way to link the east and west coasts of the United States.

LOCKS

Locks are used to raise and lower ships a total of 170 feet during the 51-mile trip through the Panama Canal. For example, ships from the Atlantic Ocean are lifted by the Gatún Locks to the level of Gatún Lake. The ships cross the human-made lake, then move through another waterway, the Gaillard Cut. The Pedro Miguel and Miraflores locks then lower the ships to the level of the Pacific Ocean.



Critical Thinking

1. Analyze Patterns On a world map, identify the route that ships took to get from New York City to San Francisco before the Panama Canal opened. How did this route change after the opening of the canal?

2. Create a Model Use clay to shape a model of a cross-section of the Panama Canal. For the locks, use foam blocks or pieces of wood that you have glued together. Paint the model, and then label each part of the canal.

Module 6 Assessment

Key Terms and People

For each key term or person below, write a sentence explaining its significance to U.S. foreign policy between 1890 and 1920.

1. Queen Liliuokalani
2. imperialism
3. José Martí
4. yellow journalism
5. USS *Maine*
6. protectorate
7. Open Door notes
8. Boxer Rebellion
9. Panama Canal
10. Roosevelt Corollary

Main Ideas

Use your notes and the information in the module to answer the following questions.

Imperialism and America

1. What three factors spurred American imperialism?
2. How did European imperialism affect Africa?
3. Why did Admiral Alfred T. Mahan feel the United States should build up its naval power?
4. How was religion used to justify imperialism?
5. How did Queen Liliuokalani's main goal conflict with American imperialists' goals?

The Spanish-American War

6. Why was American opinion about Cuban independence divided?
7. How did the Spanish try to avoid war with the United States?
8. What event ultimately led the United States to change its foreign policy to one of intervention?
9. Briefly describe the terms of the Treaty of Paris of 1898.

Acquiring New Lands

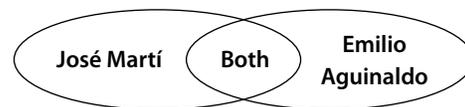
10. Why was the United States interested in events in Puerto Rico?
11. What was the Teller Amendment?
12. How did the annexation of the Philippines expand America's global influence?
13. What sparked the Boxer Rebellion in 1900, and how was it crushed?
14. What three key beliefs about America's industrial capitalist economy were reflected in the Open Door policy?

America as a World Power

15. What conflict triggered the war between Russia and Japan?
16. What role did the United States play in the revolution in Panama?
17. Why is the construction of the Panama Canal considered one of the world's greatest engineering feats?
18. Explain the key difference between Woodrow Wilson's missionary, or moral, diplomacy and William Taft's dollar diplomacy.

Critical Thinking

1. **Categorize** Create a Venn diagram to show the similarities and differences between José Martí of Cuba and Emilio Aguinaldo of the Philippines.



2. **Make Inferences** Why would a powerful navy be important to the imperialist ambitions of the United States?
3. **Analyze Causes** Imperialists, like Admiral Alfred T. Mahan, advocated for growing America's influence by increasing the strength and presence of its military. How might the growing global presence of the U.S. military have led to the Spanish-American War?

Module 6 Assessment, continued

4. **Analyze Issues** At the turn of the century, African Americans and other racial minorities in the United States often faced discrimination and racism. How were the justifications for these practices similar to the cultural factors used to justify imperialism?
5. **Predict** Would Cuba have won its independence in the late 19th century if the United States had not intervened there? Support your opinion with details from the text.
6. **Analyze Motives** What economic, social, and political factors helped lead to the Spanish-American War?
7. **Analyze Events** How did the Spanish-American War mark the emergence of the United States as a world power?
8. **Analyze Effects** What effects did the Open Door policy have on U.S. interests in Asia?

Interact with History

Suppose you are a journalist at the end of the Spanish-American War. You work for William Randolph Hearst's *New York Journal*. Write a newspaper editorial that presents your point of view about whether or not the Senate should ratify the Treaty of Paris, thus annexing the Philippines.

Focus on Writing

Imagine you are a worker helping to build the Panama Canal. Write a diary entry giving details about the work you are doing, the hardships you face, and why you think the project is worthwhile.

Multimedia Activity

Use Internet resources to research opinions on imperialism between 1895 and 1920. Then, use your research to answer the question: Why did imperialism prevail over anti-imperialism in the United States? Create a presentation to deliver your findings. Use facts and details from your research to support your conclusion.

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