

CHAPTER  
**10**

# AMERICA CLAIMS AN EMPIRE



This lithograph of Roosevelt leading the Rough Riders at San Juan Hill shows the men on horseback, although they actually fought on foot.



**1893** Business groups, aided by U.S. marines, overthrow Hawaii's Queen Liliuokalani.

**1898** U.S.S. *Maine* explodes and sinks. The Spanish-American War begins.

**1901** Theodore Roosevelt becomes president after McKinley is assassinated.

USA  
WORLD

1890

1900

**1895** Guglielmo Marconi develops the technology that led to modern radio.

**1898** Marie Curie discovers radium.



**1900** In China, the Boxers rebel.

**1903** Panama declares its independence from Colombia.

# INTERACT

## WITH HISTORY

In the late 1890s, American newspapers are running sensational stories about Spain's harsh rule of Cuba. Such articles anger Americans. Among those willing to fight for Cuba's freedom are a group of volunteers, the Rough Riders. Led by future president Theodore Roosevelt, the Rough Riders become a model for others to follow.

*Does the U.S. have a duty to fight for freedom in neighboring countries?*

### Examine the Issues

- When should the U.S. intervene in the affairs of another country?
- In what ways do dramatic headlines influence American opinion?



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1908 William Howard Taft is elected president.

1912 Woodrow Wilson is elected president.



1914 The Panama Canal opens.

1917 Puerto Ricans become U.S. citizens.

1917 The United States enters World War I.

1910

1910 The Mexican Revolution begins.

1914 World War I begins in Europe.



1920

1917 Mexico revises and adopts its constitution.



SECTION  
1

# Imperialism and America

## MAIN 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.

## Terms & Names

- Queen Liliuokalani
- imperialism
- Alfred T. Mahan
- William Seward
- Pearl Harbor
- Sanford B. Dole

## CALIFORNIA STANDARDS

**11.4.2** Describe the Spanish-American War and U.S. expansion in the South Pacific.

**REP 3** Students evaluate major debates among historians concerning alternative interpretations of the past, including an analysis of authors' use of evidence and the distinctions between sound generalizations and misleading oversimplifications.

**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.

**HI 2** Students recognize the complexity of historical causes and effects, including the limitations on determining cause and effect.

## One American's Story

In 1893 **Queen Liliuokalani** (lə-lē'ə-ō-kə-lā'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.

### A PERSONAL VOICE QUEEN LILIUOKALANI

"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."

—quoted in *Those Kings and Queens of Old Hawaii*



▲ Hawaii's "Queen Lili" 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. However, by the 1880s, many American leaders had become convinced that the United States should join the imperialist powers of Europe and establish colonies overseas. **Imperialism**—the policy in which stronger nations extend their economic, political, or military control over weaker territories—was already a trend around the world.

## MAIN IDEA

### Analyzing Effects

**A** How did European imperialism affect Africa?

**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. **A**

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.

Most Americans gradually warmed to the idea of expansion overseas. With a belief in manifest destiny, they already had pushed the U.S. border to the Pacific Ocean. 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. 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 solution to American overproduction and the related problems of unemployment and economic depression.

### Background

In the late 1800s, new farm machinery greatly improved grain production. For example, plows, harrows, threshing machines, and reapers increased corn production by 264 percent and the wheat harvest by 252 percent.

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. ►



## KEY PLAYER



### ADMIRAL ALFRED T. MAHAN 1840–1914

Alfred T. Mahan joined the U.S. Navy in the late 1850s and served for nearly forty 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.

**BELIEF IN CULTURAL SUPERIORITY** Cultural factors also were used to justify imperialism. 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 “civilization” to 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 U.S. 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. **B**

### MAIN IDEA

#### Developing Historical Perspective

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

## 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 1300 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.

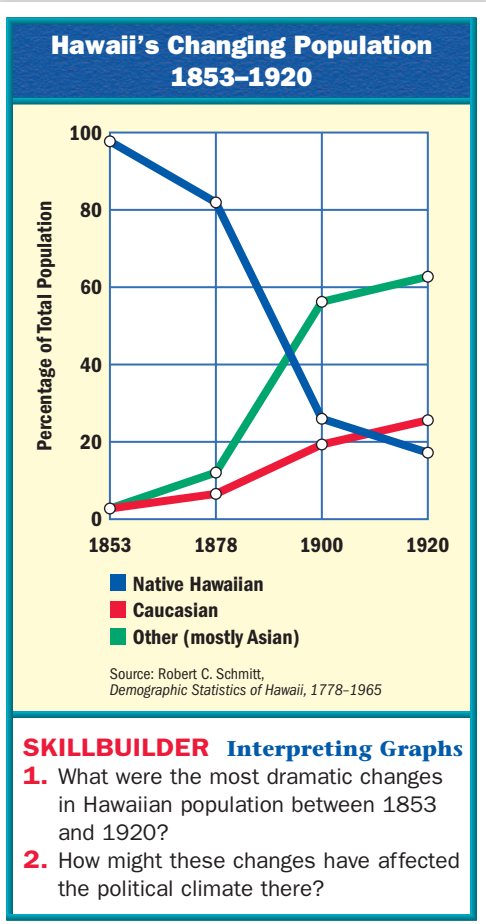
**THE CRY FOR ANNEXATION** In the mid-19th century, American-owned sugar plantations accounted for about three-quarters of the islands’ wealth. Plantation owners imported thousands of laborers from Japan, Portugal, and China. By 1900, foreigners and immigrant laborers outnumbered native Hawaiians about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

### Vocabulary

**annex:** to incorporate territory into an existing country or state



### SKILLBUILDER Interpreting 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?

**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**.

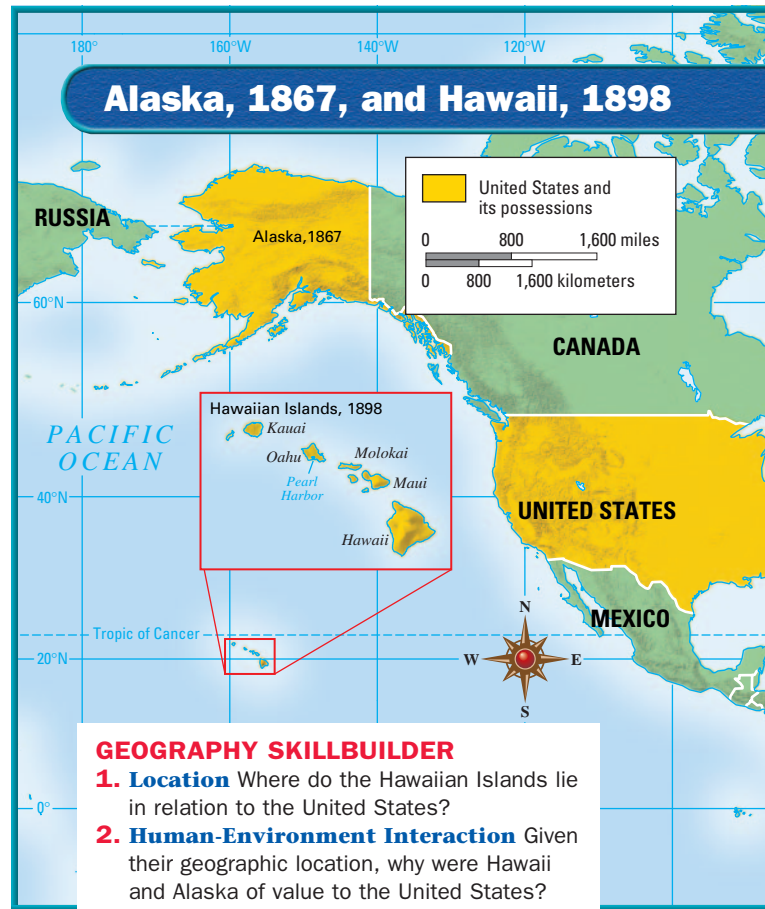
President Cleveland directed that the queen be restored to her throne. When Dole refused to surrender power, Cleveland formally recognized the Republic of Hawaii. But he refused to consider annexation unless a majority of Hawaiians favored it.

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. **C**

**MAIN IDEA**

**Analyzing Events**

**C** What factors led to the annexation of Hawaii in 1898?



**SECTION 1**

**ASSESSMENT**

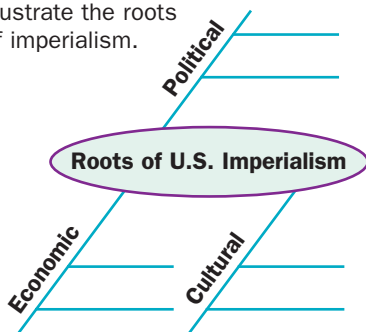
**1. TERMS & NAMES** For each term or name, write a sentence explaining its significance.

- Queen Liliuokalani
- Alfred T. Mahan
- Pearl Harbor
- imperialism
- William Seward
- Sanford B. Dole

**MAIN IDEA**

**2. TAKING NOTES** (11.4.2)

Copy this web on your paper and fill it in with events and concepts that illustrate the roots of imperialism.



Choose one event to explain further in a paragraph.

**CRITICAL THINKING**

**3. DRAWING CONCLUSIONS** (HI 2)

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. EVALUATING** (REP 4)

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. ANALYZING PRIMARY SOURCES** (11.4.2)

In the following passage, how does Indiana Senator Albert J. Beveridge explain the need for the U.S. to acquire new territories?

**“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.”**

—quoted in Beveridge and the Progressive Era



SECTION  
2

# The Spanish-American War

## MAIN 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.

## Terms & Names

- José Martí
- Valeriano Weyler
- yellow journalism
- U.S.S. *Maine*
- George Dewey
- Rough Riders
- San Juan Hill
- Treaty of Paris

## CALIFORNIA STANDARDS

**11.4.2** Describe the Spanish-American War and U.S. expansion in the South Pacific.

**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.

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## One American's Story

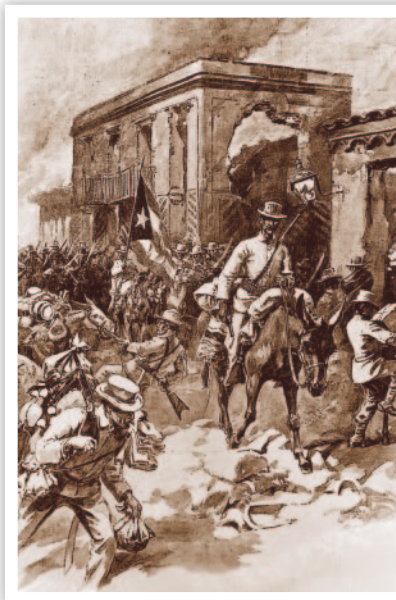
Early in 1896, James Creelman traveled to Cuba as a *New York World* reporter, covering the second Cuban war for independence from Spain. While in Havana, he wrote columns about his observations of the war. His descriptions of Spanish atrocities aroused American sympathy for Cubans.

### A PERSONAL VOICE JAMES CREELMAN

“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?”

—*New York World*, May 17, 1896

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



▲ Cuban rebels burn the town of Jaruco in March 1896.

## 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. The cry “Cuba Libre!” was, after all, similar in sentiment to Patrick Henry’s “Give me liberty or give me death!”

## War Fever Escalates

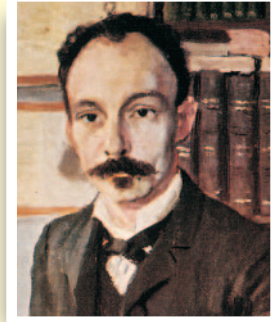
In 1896, Spain responded to the Cuban revolt by sending General **Valeriano Weyler** to Cuba to restore order. Weyler tried to crush the rebellion by herding the entire rural population of central and western Cuba into barbed-wire concentration camps. Here civilians could not give aid to rebels. An estimated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

### KEY PLAYER



**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.

#### Vocabulary

**guerrilla:** a member of a military force that harasses the enemy

#### MAIN IDEA

#### Analyzing Motives

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



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 U.S.S. 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 **U.S.S. *Maine*** to Cuba to bring home 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. **B**

**MAIN IDEA**

**Summarizing**

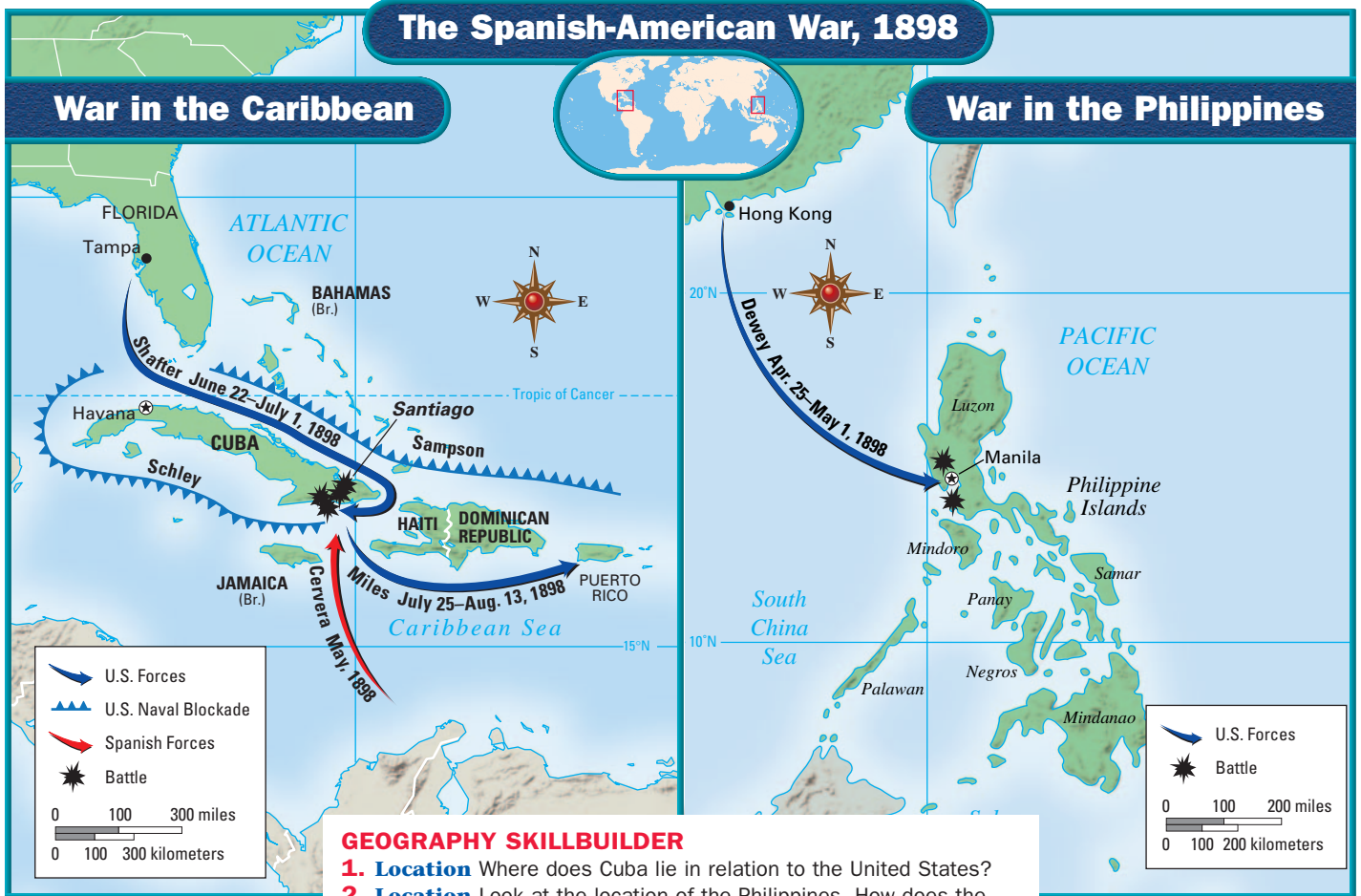
**B** What events increased the tension between the United States and Spain?

## War with Spain Erupts

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.



▲ When the *U.S.S. Maine* exploded in the harbor of Havana, newspapers like the *New York Journal* were quick to place the blame on Spain.



**MAIN IDEA**

**Analyzing Events**

**C** How did the Spanish try to avoid war with the United States?

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, and on April 20 the United States declared war. **C**

**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.

**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 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. **D**

**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. 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

#### Background

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



▲ These African-American troops prepare for battle during the Spanish-American War.

#### MAIN IDEA

#### Summarizing

**D** What were the terms of the Treaty of Paris?

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 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.



▲ 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.

SECTION 2

ASSESSMENT

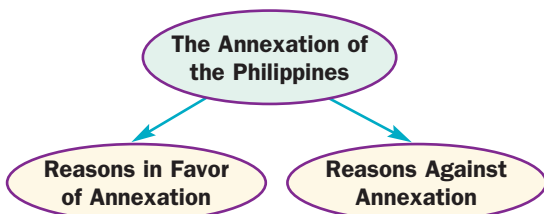
**1. TERMS & NAMES** For each term or name, write a sentence explaining its significance.

- José Martí
- yellow journalism
- George Dewey
- San Juan Hill
- Valeriano Weyler
- U.S.S. *Maine*
- Rough Riders
- Treaty of Paris

**MAIN IDEA**

**2. TAKING NOTES** (11.4.2)

In 1898, a debate raged in the United States over whether the U.S. had the right to annex the Philippines. Use a graphic organizer like the one below to summarize the pros and cons of this debate.



Which side do you support? Why?

**CRITICAL THINKING**

**3. MAKING INFERENCES** (REP 4)

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 (page 346)
- Hearst’s remark to Remington
- the *Journal* headline about the explosion of the battleship *Maine*

**4. ANALYZING EFFECTS** (HI 2)

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

**5. DRAWING CONCLUSIONS** (HI 1)

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?



SECTION 3

# Acquiring New Lands

### MAIN 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.

### Terms & Names

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

#### CALIFORNIA STANDARDS

**11.4.1** List the purpose and the effects of the Open Door policy.

**11.4.2** Describe the Spanish-American War and U.S. expansion in the South Pacific.

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

**REP 1** Students distinguish valid arguments from fallacious arguments in historical interpretations.

**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.

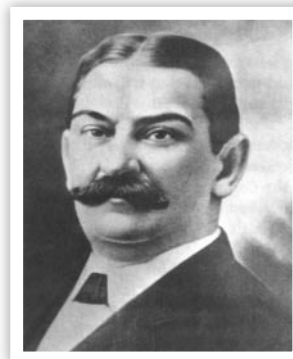
**HI 2** Students recognize the complexity of historical causes and effects, including the limitations on determining cause and effect.

**HI 3** Students interpret past events and issues within the context in which an event unfolded rather than solely in terms of present-day norms and values.

**HI 4** Students understand the meaning, implication, and impact of historical events and recognize that events

### 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.



**Luis Muñoz Rivera**

#### A PERSONAL VOICE LUIS MUÑOZ RIVERA

**“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.”**

—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. **A**

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.

## 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.

## 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 above. 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.

### MAIN IDEA

#### Analyzing Issues

**A** Why was Puerto Rico important to the United States?

#### Background

Yellow fever damages many body parts, especially the liver. Dr. Carlos Finlay discovered that the disease is carried by mosquitoes. Clearing out the mosquitos' breeding places helped eliminate the disease in Cuba.

**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**, stating 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
- 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.

**Vocabulary**  
**ratify:** to make valid by approving

**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 that had invested in the island's sugar, tobacco, and mining industries, as well as in its railroads and public utilities.

## Analyzing Political Cartoons

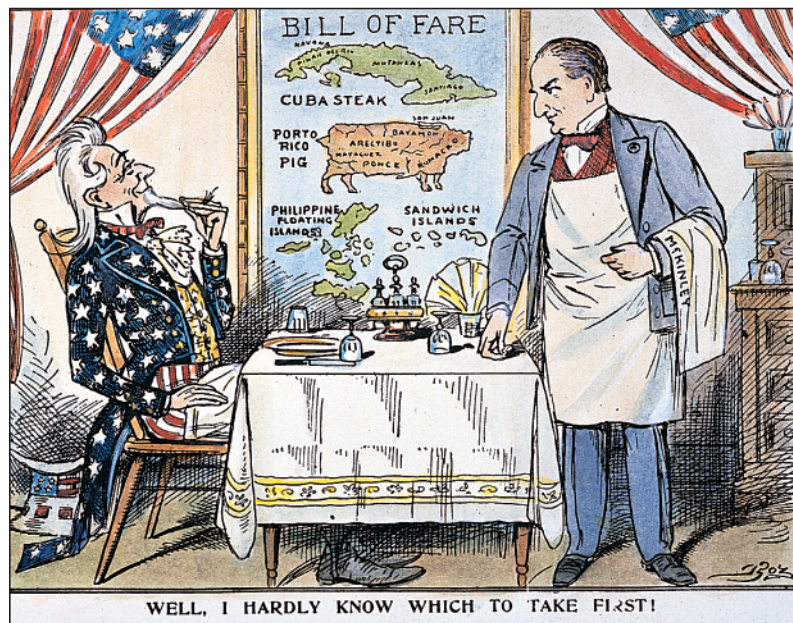
### “WELL, I HARDLY KNOW WHICH TO TAKE FIRST!”

Throughout the early 1900s, the United States intervened in the affairs of its Latin American neighbors several times. American troops withdrew from Cuba in 1902 but later returned three times to quell popular uprisings against conservative leaders. The U.S. also intervened in Nicaragua and Haiti. Not surprisingly, few Latin Americans welcomed United States intervention. As the cartoon shows, the United States had a different point of view.

#### SKILLBUILDER

##### Analyzing Political Cartoons

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



SEE SKILLBUILDER HANDBOOK, PAGE R24.

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 argued against the taking of nations as colonies.

### **A PERSONAL VOICE** ANDREW CARNEGIE

**“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.”**

—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’gē-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.

**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. **B**

**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. Under American rule, the Philippines moved gradually toward independence and finally became an independent republic on July 4, 1946.



▲ **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.**

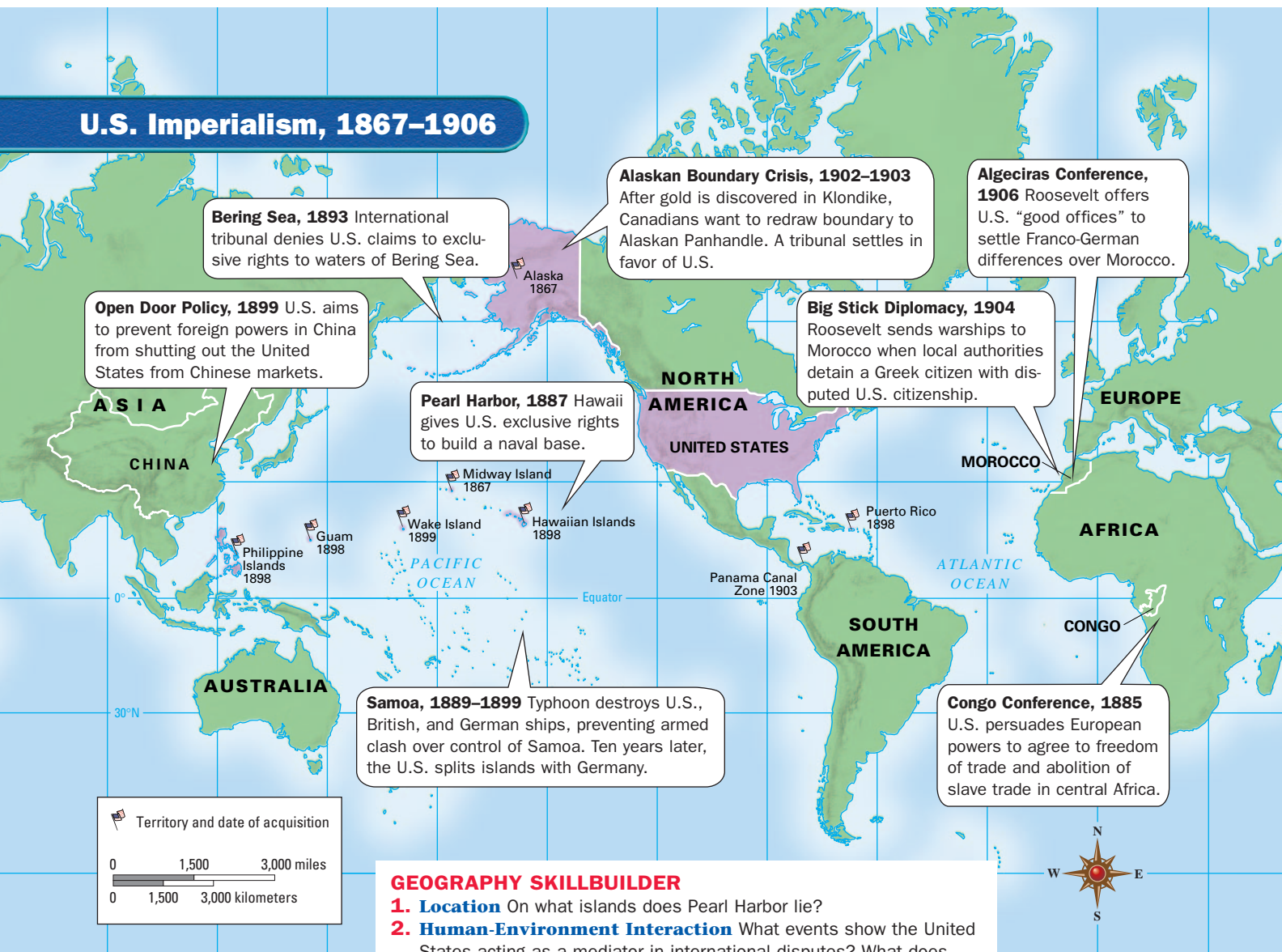
### MAIN IDEA

#### Contrasting

**B** What were the aims of the Filipinos? of the Americans?



## U.S. Imperialism, 1867–1906



**GEOGRAPHY SKILLBUILDER**

- 1. Location** On what islands does Pearl Harbor lie?
- 2. Human-Environment Interaction** What events show the United States acting as a mediator in international disputes? What does this role indicate about the status of the U.S. in the world?

## 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 China would be carved 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, thus creating an open door. This meant that no single nation would have a monopoly on trade with any part of China. The other imperialist powers reluctantly accepted this policy. **C**

**MAIN IDEA**

**Analyzing Causes**

**C** Why did Secretary of State John Hay issue the policy statements known as the Open Door notes?



▲ 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.

**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. In August 1900, troops from Britain, France, Germany, and Japan joined about 2,500 American soldiers and marched on the Chinese capital. Within two months, the international forces put down the **Boxer Rebellion**. Thousands of Chinese people died during the fighting.

**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.

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

## WORLD STAGE

### THE BOXER PROTOCOL

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.

## 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.

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, the social worker Jane Addams, and many leading writers. Anti-imperialists had different and sometimes conflicting reasons for their opposition, but all agreed that it was wrong for the United States to rule other people without their consent. The novelist Mark Twain questioned the motives for imperialism in a satirical piece written in 1901.

### A PERSONAL VOICE MARK TWAIN

“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.”

—quoted in *To the Person Sitting in Darkness*

As a novelist, Twain had great influence on American culture but little influence on foreign policy. 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.



▲ Mark Twain

## SECTION 3

### ASSESSMENT

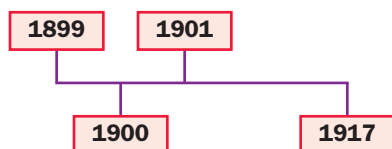
**1. TERMS & NAMES** For each term or name, write a sentence explaining its significance.

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

### MAIN IDEA

**2. TAKING NOTES** (11.4.2)

Create a time line of key events relating to U.S. relations with Cuba, Puerto Rico, and the Philippines. Use the dates already plotted on the time line below as a guide.



Which event do you think was most significant? Why?

### CRITICAL THINKING

**3. EVALUATING** (HI 2)

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. COMPARING** (11.4.1)

How was U.S. policy toward China different from U.S. policy toward the Philippines? To what can you attribute the difference?

**5. ANALYZING ISSUES** (11.4.1)

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

SECTION 4

# America as a World Power

### MAIN 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.

### Terms & Names

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

## One American's Story

### CALIFORNIA STANDARDS

Joseph Bucklin Bishop played an important role in the building of the Panama Canal as the policy advisor to the canal's chief engineer. 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.

**11.2.9** Understand the effect of political programs and activities of the Progressives (e.g., federal regulation of railroad transport, Children's Bureau, the Sixteenth Amendment, Theodore Roosevelt, Hiram Johnson).

**11.4.3** Discuss America's role in the Panama Revolution and the building of the Panama Canal.

**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.

**REP 1** Students distinguish valid arguments from fallacious arguments in historical interpretations.

**HI 2** Students recognize the complexity of historical causes and effects, including the limitations on determining cause and effect.

**HI 4** Students understand the meaning, implication, and impact of historical events and recognize that events could have taken other directions.

### A PERSONAL VOICE

JOSEPH BUCKLIN BISHOP

"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."

—quoted in *The Impossible Dream: The Building of the Panama Canal*



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

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, Tsar Nicholas II of Russia declared war on Japan, Russia's neighbor in East Asia. Russia and Japan were both imperialist powers, and they were competing for control of Korea. The Japanese took the first action in the war with a surprise 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.

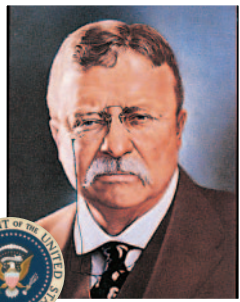
As U.S. and Japanese interests expanded in East Asia, the two nations continued diplomatic talks. In later agreements, they pledged to respect each other's possessions and interests in East Asia and the Pacific. **A**

**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. (See Geography Spotlight, page 366.) 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. On November 3, 1903, nearly a dozen U.S. warships were present as Panama declared its independence. Fifteen days later, Panama and the United

## KEY PLAYER



**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."

### MAIN IDEA

#### Analyzing Effects

**A** What were the results of Roosevelt's negotiations with the Japanese and Russians?

**THE PANAMA CANAL**

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.

**1** A ship enters a lock when the lower gates are open.

**2** When all gates are shut, water is let into the lock through a sluice (small gate).

**3** When the water has risen, the upper gates are opened, and the ship passes through the lock to the next level.

▲ This photo shows a ship that has entered the canal from the Pacific Ocean side and is heading north through the Miraflores Locks. Ships and boats can also enter the canal through the Atlantic Ocean side and head south through the Gatún Locks.

States signed a treaty in which 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 payments were to begin in 1913.

**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. **B**

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.

**MAIN IDEA**

**Identifying Problems**

**B** What problems did canal workers encounter in constructing the canal?

## Analyzing Political Cartoons

### “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).

#### SKILLBUILDER

##### Analyzing Political Cartoons

1. How does the cartoonist portray President Roosevelt?
2. Why is “The World’s Constable” a good title for this cartoon?

SEE SKILLBUILDER HANDBOOK, PAGE R24.



**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.



*“Speak softly and carry a big stick; you will go far.”*

THEODORE ROOSEVELT

Roosevelt reminded 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.

**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

**Vocabulary**  
**corollary:** an additional statement that follows logically from the first one

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. Madero 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."

**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. Argentina, Brazil, and Chile stepped in to mediate the conflict. 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.

### MAIN IDEA

#### Analyzing Motives

Why did President Wilson refuse to recognize Huerta's government?

### 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."



## History Through

### Art

#### ZAPATISTAS (1931)

José Orozco, one of Mexico's foremost artists, painted these Zapatistas (followers of Zapata), to honor the peasant men and women who fought in the Mexican revolution. Orozco did many paintings in support of the revolution.

**What aspects of the image does the artist use to convey strength and unity?**



**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-yā’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 PERSONAL VOICE PANCHO VILLA

“[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.”

—*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.

**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 its 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.



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

SECTION 4

ASSESSMENT

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

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

**SUMMARIZING**

**2. TAKING NOTES** (11.2.9)

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.

**CRITICAL THINKING**

**3. COMPARING AND CONTRASTING** (11.4.4)

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. **Think About:**

- the goal of each of these foreign policies
- how the policies defined the role of U.S. intervention in international affairs
- how the policies were applied

**4. EVALUATING DECISIONS** (REP 4)

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: Funnel for Trade

## CALIFORNIA STANDARDS

**11.4.3** Discuss America's role in the Panama Revolution and the building of the Panama Canal.

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, 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, or canal, would substantially reduce the sailing time between the nation's Atlantic and Pacific ports.

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. In the year 2000, Panama assumed full control of the canal.

### 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.



### INTERCOASTAL TRADE ▲

The first boat through the canal heralded the arrival of increased trade between the Atlantic and Pacific ports of the United States.

San Francisco  
to Asia

### ◀ OCEANGOING VESSELS

Ships, like this one, must be of a certain dimension in order to fit through the canal's locks. These container 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.



### ◀ NEW YORK CITY

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.



### NEW ORLEANS ▲

Since its founding in 1718, New Orleans has served as a major port for the products of the areas along the Mississippi River. In 1914, the Panama Canal brought Pacific markets into its orbit.



Panama is a narrow stretch of land—or isthmus—that connects North and South America. In building the canal, engineers took advantage of natural waterways. Moving ships through the mountains of the Continental Divide required the use of massive locks. Locks allow a section of the canal to be closed off so that the water level can be raised or lowered.

### THINKING CRITICALLY

- Analyzing 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?
- Creating a Model** Use clay to shape a model of a cross-section of the Panama Canal as shown in the Science and Technology feature on page 361. For the locks, use styrofoam blocks or pieces of wood which you have glued together. Paint the model, and then label each part of the canal.

SEE SKILLBUILDER HANDBOOK, PAGE R31.

**VISUAL SUMMARY**

**AMERICA CLAIMS AN EMPIRE**

**CAUSES**

- Economic competition among industrial nations
- Political and military competition, including the creation of a strong naval force
- A belief in Anglo-Saxon superiority

**AMERICAN IMPERIALISM**



**EFFECTS**

- The U.S. purchased Alaska in 1867.
- The U.S. annexed Hawaii in 1898.
- In 1898, the U.S. helped Cuba win independence from Spain.
- In the Treaty of Paris, the U.S. gained Puerto Rico, Guam, and the Philippine Islands.
- Following the Spanish-American War, the U.S.
  - reorganized the government of Puerto Rico
  - established a protectorate over Cuba
  - crushed a revolt in Philippines
- In 1899, the Open Door policy established U.S. trading rights in China.
- In the early 1900s, President Roosevelt initiated plans for the Panama Canal and asserted the right of the U.S. to exercise police power in the Western Hemisphere.
- President Wilson pressured Mexico and other countries in the Western Hemisphere to establish democratic governments.

**TERMS & NAMES**

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

- |                        |                         |
|------------------------|-------------------------|
| 1. Queen Liliuokalani  | 6. protectorate         |
| 2. imperialism         | 7. Open Door notes      |
| 3. José Martí          | 8. Boxer Rebellion      |
| 4. yellow journalism   | 9. Panama Canal         |
| 5. U.S.S. <i>Maine</i> | 10. Roosevelt Corollary |

**MAIN IDEAS**

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

**Imperialism and America** (pages 342–345)

1. What three factors spurred American imperialism? (HI 2)
2. How did Queen Liliuokalani’s main goal conflict with American imperialists’ goals? (11.4.2)

**The Spanish-American War** (pages 346–351)

3. Why was American opinion about Cuban independence divided? (11.4.2)
4. Briefly describe the terms of the Treaty of Paris of 1898. (11.4.2)

**Acquiring New Lands** (pages 352–358)

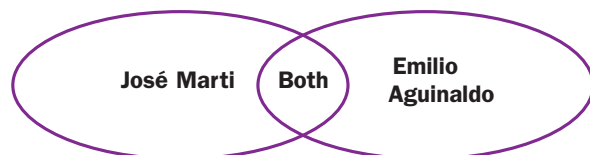
5. Why was the U.S. interested in events in Puerto Rico? (HI 1)
6. What sparked the Boxer Rebellion in 1900, and how was it crushed? (11.4.1)
7. What three key beliefs about America’s industrial capitalist economy were reflected in the Open Door policy? (11.4.1)

**America as a World Power** (pages 359–365)

8. What conflict triggered the war between Russia and Japan? (HI 2)
9. Why is the construction of the Panama Canal considered one of the world’s greatest engineering feats? (11.4.3)
10. Explain the key difference between Woodrow Wilson’s moral diplomacy and Teddy Roosevelt’s “big stick” diplomacy. (11.4.4)

**CRITICAL THINKING**

1. **USING YOUR NOTES** Create a Venn diagram like the one below to show the similarities and differences between José Martí of Cuba and Emilio Aguinaldo of the Philippines. (11.4.2)



2. **HYPOTHESIZING** 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. (REP 4)
3. **INTERPRETING MAPS** Look carefully at the Caribbean map on page 349 and the world map on page 356. Why do you think American naval bases in the Caribbean and the Pacific were beneficial to the United States? (HI 1)

## Standardized Test Practice

Use the cartoon and your knowledge of U.S. history to answer question 1.



1. What is the cartoonist's point of view concerning the relationship between the United States and Cuba? (REP 2)
  - A. The United States wishes to be friends with Cuba.
  - B. The United States will devour Cuba.
  - C. The United States is wasting its time fighting over such a small area.
  - D. The United States has no interest in Cuba.

Use the map and your knowledge of U.S. history to answer question 2.



2. How did the building of the Panama Canal support United States efforts to become a world power? (11.4.3)
  - A. It gave the United States a colony in Central America.
  - B. It prevented Japan and China from attacking Hawaii.
  - C. It opened up a new avenue for trade with China.
  - D. By providing a shortcut between the Atlantic Ocean and Pacific Ocean, it opened up new trading opportunities.

**ADDITIONAL TEST PRACTICE, pages S1–S33.**



### ALTERNATIVE ASSESSMENT (HI 3, REP 4)

1. **INTERACT WITH HISTORY** Recall your discussion of the question on page 341:

#### *Does the U.S. have a duty to fight for freedom in neighboring countries?*

Suppose you are a journalist at the end of the Spanish-American War. You work for William Randolph Hearst's the *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.

2. **LEARNING FROM MEDIA** Use the CD-ROM *Electronic Library of Primary Sources* and other resources to research opinions on imperialism between 1895 and 1920.
  - Choose a document, incident, or piece of writing about imperialism. Decide if you support it or disagree with it.
  - Write a speech that presents your point of view. Decide how you will make your arguments clear and convincing while also addressing opposing concerns.
  - Practice your speech aloud and then present it to the class.