

## CHAPTER

17

1898–1917

Entering the  
WORLD STAGETHE BIG  
PICTURE

U.S. foreign relations took a new turn at the end of the nineteenth century. Global competition for empire led the United States into war against Spain and into military conflicts in Mexico. The United States had forged a new role as a world power.

Skills  
FOCUS

## READING LIKE A HISTORIAN

In the Battle of San Juan Hill, future president Theodore Roosevelt leads a band of rough-and-ready volunteers in a famous charge in a war against Spain.

**Interpreting Visuals** What kind of leader does this painting suggest Roosevelt was? What kind of president do you think he would make?

See *Skills Handbook*, p. H30



U.S.

February  
1898

USS Maine explodes in Havana Harbor, triggering the Spanish-American War.



1900



World

1900

Radicals in China stage the Boxer Rebellion to drive away foreigners.

1903

1903

Panama declares independence from Colombia.

1904  
The U.S. State const of the Cana



## History's Impact video program

Watch the video to understand the impact of the Panama Canal



**1904**

The United States begins construction of the Panama Canal.



**1906**

**1903**  
Panama declares independence from Colombia.

**1905**

Japan wins the Russo-Japanese War.

**1909**

**1910**  
The Mexican Revolution begins.



**1911**

President Taft promotes "dollar diplomacy."

**1912**

**April 1914**

U.S. troops intervene in the Mexican Revolution, occupying Veracruz, Mexico.



**August 1914**

Panama Canal opens.

**1915**

**1917**  
Russian Revolution begins.

**1918**



# The Lure of Imperialism

## BEFORE YOU READ

### MAIN IDEA

The United States entered the imperialist competition late, but it soon extended its power and influence in the Pacific region.

### READING FOCUS

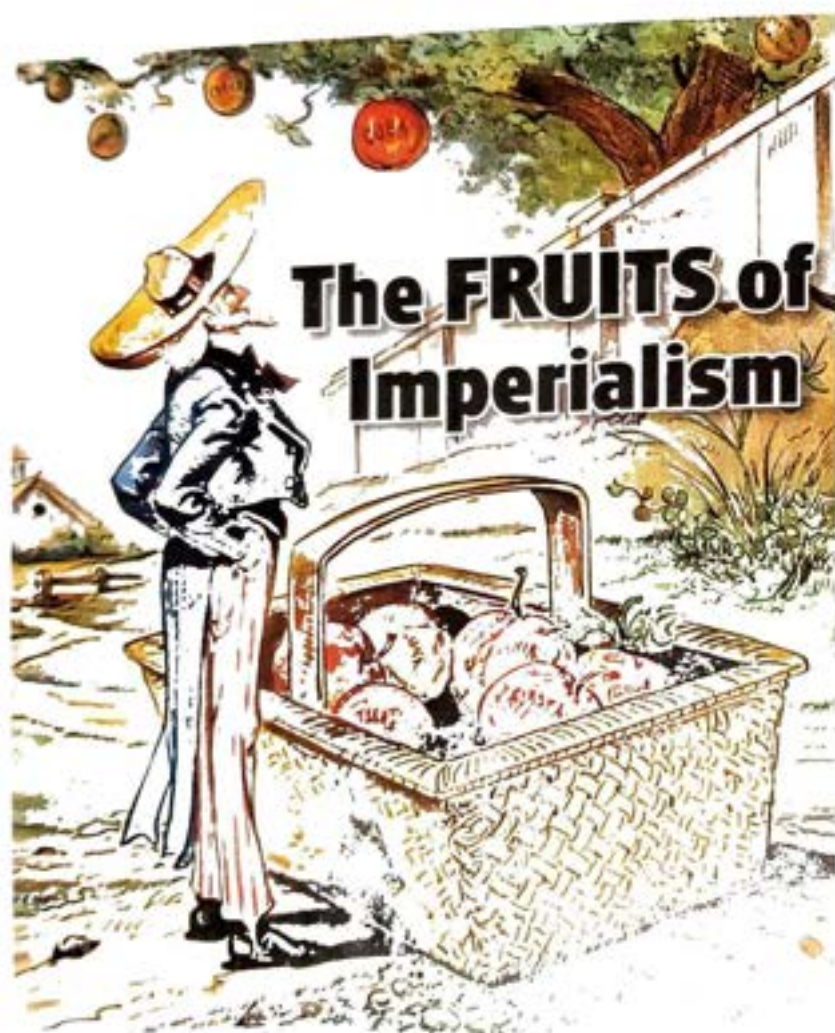
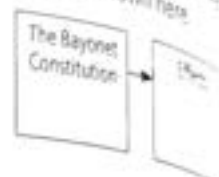
1. What inspired the imperialist activity of the late 1800s?
2. How did the United States take control of Hawaii?
3. How did the United States gain influence in China?
4. How did the United States exert influence in Japan?

### KEY TERMS AND PEOPLE

imperialism  
bayonet constitution  
Liliuokalani  
Sanford B. Dole  
sphere of influence  
Open Door Policy  
Boxer Rebellion  
Russo-Japanese War

### TAKING NOTES

As you read, take notes on the effects of the bayonet constitution in Hawaii. Record your notes in a graphic organizer like the one shown here.



▲ Although Uncle Sam may have been slow to pluck new territories, this political cartoon suggests that his gains were worth the wait.

### THE INSIDE STORY

### Why did the United States buy Alaska?

In the 1890s, the United States seemed to be off to a late start in the scramble for colonial possessions. European nations were already busily adding new colonies to their empires. The United States, though, had actually taken its first step toward imperialism back in 1867. While European nations were looking toward Africa and Asia, the United States was expanding in North America and the Pacific.

The huge Alaska landmass lies at the northwestern edge of North America, almost touching northeastern Russia. Russian fur traders were the first foreigners to settle there, in 1784. With a charter from Czar Paul I, the Russian-American Company served as Alaska's government after 1799. Russian, British, and American fur traders all competed amicably. But by 1867, sea otters, which had the most valuable fur, were becoming scarce. In addition, Russia was struggling to recover from the Crimean War. Russia offered to sell the territory to the United States.

At the time, William H. Seward was secretary of state for President Andrew Johnson. He had visions of an American empire and was eager to buy Alaska. He thought it had potential as a resource for fur, timber, and metals. He faced opposition from Congress, though. Unaware of Alaska's rich mineral resources, many people regarded the territory as a frozen wasteland.

Seward finally succeeded in buying Alaska for \$7.2 million. Critics joked about Seward's Folly and Seward's Icebox. Later, though, after gold and oil were discovered in Alaska, Americans came to appreciate the bargain they'd gotten.

Alaska was not Seward's only smart acquisition. The very same year—1867—he snapped up the Midway Islands, strategically located west of Hawaii. ■



## Imperialist Activity

From the 1870s to the 1910s, a few industrialized nations actively competed for territory in Africa, Asia, and Latin America. This scramble for territorial control was part of the imperialist mind-set. **Imperialism** involves the extension of a nation's power over other lands.

By the late 1800s, nations such as Great Britain, France, Belgium, Germany, and Japan had all embraced the imperialist spirit. Soon, beginning in Hawaii, the United States would also pursue imperialist policies. What led to this quest for empire?

**Economic interests** The Industrial Revolution had brought great prosperity to the Western powers. Industrialized nations had flooded their own countries with goods and investment capital. Now they looked to other nations for new customers and new places to invest. Industrialists also began to look to Africa, Asia, and Latin America for new sources of raw materials for their factories.

**Military needs** Industrialized nations created strong navies to defend their shores and protect their trading interests. But navies needed bases where ships could refuel and make repairs. Industrialized nations sought foreign territory so they could build these coaling stations in strategic places.

**Ideology** Two popular ideologies also contributed to imperialism. One was a strong sense of nationalism, or love of one's country. Many people felt that territorial conquests enhanced a nation's power and prestige.

The other ideological motive was a feeling of cultural superiority. Because Africa, Asia, and Latin America had less industry and urban development, they seemed "backward" to many Europeans and Americans in the late 1800s.

Social Darwinism fed into this view. Social Darwinists believed that when nations competed against one another, only the fittest would survive. Some people therefore considered it a social responsibility to "civilize" the inhabitants of less developed countries and spread the benefits of Western society. In addition, Protestant Christian missionaries felt they had a moral duty to convert others to their beliefs.

**The scramble for territory** By the late 1800s, European imperial powers had taken control of vast territories in Africa and Asia, and dominated the economy of Latin America. The British Empire alone ruled about one-quarter of the world's land and population. France, Belgium, Germany, and Japan also controlled huge areas overseas.

Many Americans began to believe it was time for the United States to claim its own territories abroad. The prospect of new markets and military advantages was a powerful attraction. Some Americans, too, wanted to spread the Christian faith and democratic values. Josiah Strong, a Protestant clergyman, expressed this viewpoint eloquently.

### HISTORY'S VOICES

"The two great needs of mankind . . . are, first, a pure, spiritual Christianity, and second, civil liberty. Without controversy, these are the forces which, in the past, have contributed most to the elevation of the human race . . . It follows, then, that the Anglo-Saxon [person of British descent], as the great representative of these two ideas . . . is divinely commissioned to be, in a peculiar sense, his brother's keeper."

—Josiah Strong, *Our Country*, 1885

In the mid-1800s, Americans had believed it was their manifest destiny to expand westward to the Pacific Ocean. Now people sought to move even beyond the shoreline, to claim distant islands farther west.

### READING CHECK

**Summarizing** What were the three main reasons that industrialized nations became imperialist nations?

### ACADEMIC VOCABULARY

**ideology** set of ideas about human life or culture

## CAUSES OF U.S. EXPANSIONISM

QUICK FACTS

### CAUSES

- **Economic** Desire for new markets and raw materials
- **Military** Desire for naval bases and coaling stations
- **Ideological** Desire to bring Christianity, western-style culture, and democracy to other peoples

United States expansionism



## Taking Control of Hawaii

American expansionists became interested in acquiring Hawaii in the late 1800s. Located some 2,000 miles west of California, Hawaii was an ideal spot for coaling stations and naval bases for ships traveling to and from Asia.

**Early contact** Americans were not the first outsiders to show interest in Hawaii. A British explorer, Captain James Cook, had visited the islands in 1778. Great Britain did not claim Hawaii then, but Captain Cook's voyage brought Hawaii to the attention of the outside world.

Shortly after Cook's arrival, Hawaii's Chief Kamehameha (kah-MAY-hah-MAY-hah) united the eight major islands under his leadership. He established a monarchy and began a profitable trade in sandalwood. In the 1820s U.S. ships began arriving with some frequency, bringing traders and missionaries. Many of the missionaries had come from New England to convert Hawaiians to Christianity. Soon, the missionaries and their families began to settle down and raise crops, particularly sugarcane.

The foreigners also brought diseases, to which Hawaiians had no immunity. The population of Hawaii declined from about 300,000 in the 1770s to about 40,000 by 1893.

**Sugar interests gain power** As more and more Americans came to the islands, investors in the sugar industry began increasing their control. Americans had a sweet tooth, and sugar planters grew very rich. To keep the sugarcane plantations running, planters needed workers. With so few native Hawaiians left, planters brought in workers from China, Japan, and the Philippines.

Kalakaua became king in 1874. By this time, Americans had gained control over Hawaii's land and economy. But Kalakaua was strongly nationalistic. He resented the American influence over his government and promised to put native Hawaiians back into power.

### HISTORY'S VOICES

"Do not be led by the foreigners; they had no part in our hardships, in gaining the country. Do not be led by their false teachings."

—Kalakaua, "Proclamation," 1877

Early in his reign, King Kalakaua allied himself with landowners in his desire to strengthen the Hawaiian economy. He negotiated a treaty in 1875 that allowed Hawaiian sugar to enter the United States tax free. This

## Pineapple Industry

James Dole, Sanford Dole's cousin, began growing pineapples in Hawaii in 1901. By the 1930s Dole supplied 90 percent of the world's canned pineapple.





made Hawaiian sugar cheap and drove sugar from other places. The treaty gave a real boost to the Hawaiian sugar industry. But the more money that the sugar tycoons made, the more power they wanted over Hawaiian affairs.

**Plotting against the king** A group of American business leaders, planters, and traders formed a secret society called the Hawaiian League. Its purpose was to overthrow the monarchy and establish a democracy in Hawaii under the control of Americans.

Conflicts between these American business leaders and the king escalated in 1886. The United States wanted the port of Pearl Harbor in exchange for renewing the sugar treaty. But King Kalakaua refused to give up the independence of any part of Hawaii.

Angered, the Hawaiian League forced King Kalakaua to sign a new constitution at gunpoint in July 1887. The king angrily called it the **bayonet constitution**. It severely restricted his power and deprived most Hawaiians of the vote. King Kalakaua was now forced to give Pearl Harbor to the United States. This gave U.S. warships a permanent port in Hawaii.

American sugar planters now had political control over Hawaii. But the economy suffered a heavy blow in 1890. The United States revoked the sugar treaty in order to support sugar producers on the U.S. mainland. American sugar producers in Hawaii believed they had only one option to protect their businesses—become part of the United States. Secretly, they began talks with U.S. officials about annexation.

**End of the monarchy** When King Kalakaua died in 1891, his sister **Liliuokalani** (Li-lee-uh-woh-kuh-LAHN-ee) became queen. Queen Liliuokalani was a Hawaiian nationalist who wanted to do away with the bayonet constitution. In January 1893, she announced her plan to restore the power of the Hawaiian monarchy. In response, members of the business community plotted to overthrow her. They wanted the islands to be governed as a territory of the United States.

John L. Stevens, the American minister to Hawaii, decided he would help the rebel sugar planters. Without authorization, he ordered four boatloads of U.S. Marines to go ashore. They took up positions around the royal palace, aiming machine guns and cannons at the

## FACES OF HISTORY

### Queen LILIUOKALANI 1838–1917



Born into a royal Hawaiian family, Lydia Liliuokalani grew up proud of her heritage. Although she studied with foreign missionaries, learned to speak English, and married the son of a Boston sea captain, she did not want Hawaii to become part of the United States.

After ascending to the throne in 1891, Liliuokalani tried to fortify the islands through a political movement called Oni Pa'a (Stand Firm). Nonetheless, she was soon overthrown by American business owners. Accused of attempting to revolt against the new government, Liliuokalani was arrested in 1895 and jailed for more than a year. After being released, the queen continued to live quietly in Hawaii, a beloved figure to her people.

**Make Inferences** What can you infer about the goals of Queen Liliuokalani's Oni Pa'a movement?

building. The rebels then declared an end to the monarchy. Queen Liliuokalani surrendered under protest on January 17, 1893.

The rebel leaders quickly formed a new regime with **Sanford B. Dole**, a sugar tycoon, as president. John L. Stevens, acting on his own once again, formally recognized the new Republic of Hawaii. He also proclaimed Hawaii to be under U.S. protection, while the Senate considered a treaty to annex the islands.

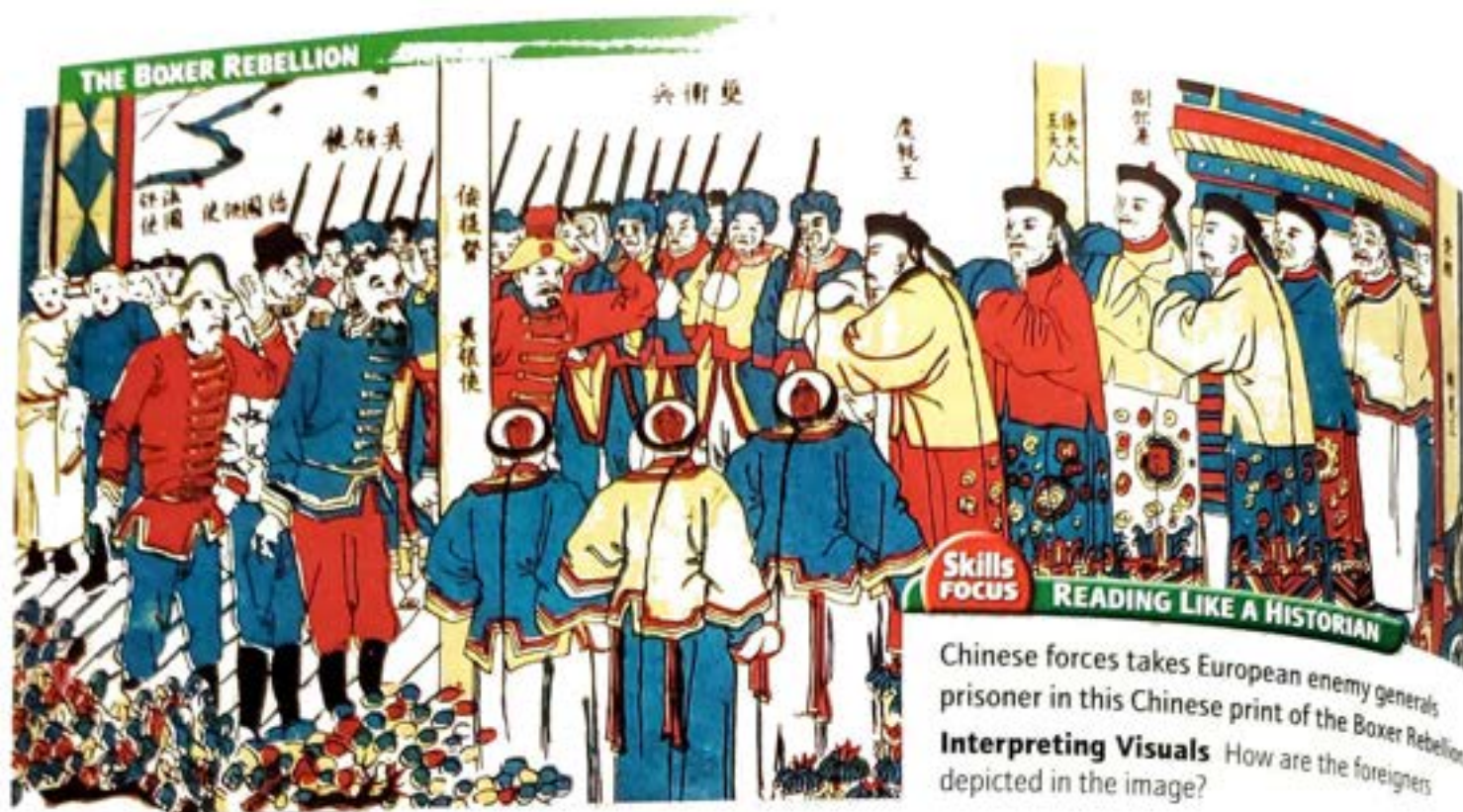
**Annexation** Troubled by the events in Hawaii, President Grover Cleveland put the treaty on hold and ordered an investigation. The investigator's report condemned the revolt against Liliuokalani and proposed restoring her to the throne. Cleveland agreed, but Dole refused to step down.

Cleveland was unwilling to use military force to back Liliuokalani. Yet he would not support annexation, either. The matter remained at a standstill until the next president, William McKinley, took office. McKinley favored annexation, and Congress narrowly voted its approval in 1898. Hawaii became an American territory and eventually—in 1959—the fiftieth state. In 1993 Congress apologized for the U.S. role in overthrowing Liliuokalani.

#### READING CHECK

**Sequencing** How did American sugar interests gain so much power in Hawaii?





Chinese forces takes European enemy generals prisoner in this Chinese print of the Boxer Rebellion.

**Interpreting Visuals** How are the foreigners depicted in the image?

## Influence in China

Early on, Hawaii had attracted American interest because it was a convenient place to stop for fuel and supplies on the journey to China. American traders had been traveling to China since 1784.

Even so, China stayed nearly isolated from the rest of the world. It strictly controlled foreign trade, allowing foreigners only in the port of Guangzhou. Then in 1842, the British forced China to open five ports to British trade. Two years later, the United States received broader trading privileges as well. For the next 50 years, China's rulers struggled to keep foreign interests from overrunning the country.

The threat was not just from Western nations, however. In 1895 Japan took over the island of Taiwan and tried to seize the Liaotung Peninsula too. European powers—Russia, France, Germany, and Great Britain—quickly carved out their own **spheres of influence** in China. A sphere of influence is a geographic area where an outside nation exerts special economic or political control.

The United States was too late to secure a sphere of influence in China. American leaders feared that the United States would be shut out of the valuable China trade. As a result, Secretary of State John Hay proposed the **Open Door Policy** in 1899. The aim was to give

all nations equal trading rights in China. As Senator Henry Cabot Lodge of Massachusetts declared, "We ask no favors; we only ask that we shall be admitted to that great market upon the same terms with the rest of the world."

Hay sent notes recommending the Open Door Policy to Great Britain, Germany, Russia, Japan, France, and Italy. None of them agreed to it, but none rejected it outright. Therefore, Hay felt he could announce in March 1900 that the Open Door Policy had been approved.

With foreign countries now vying for business in China, antifoiegn sentiments grew. A secret group called the Society of Righteous and Harmonious Fists—known to westerners as Boxers—began attacking foreign missionaries and Chinese Christians. In June 1900 the Boxers laid siege to the capital city of Beijing in what became known as the **Boxer Rebellion**.

Western nations rushed 20,000 troops—including 2,000 Americans—to China. They soon quelled the rebellion, and a year later in September 1901, China signed a humiliating settlement agreement.

The Boxer Rebellion increased support for Hay's Open Door Policy. Western nations realized that competition among themselves would hurt their ability to exploit the China trade.

### READING CHECK

**Identifying Problem and Solution** Why did Hay propose the Open Door Policy?

**Solution** Why did Hay propose the Open Door Policy?



## Influence in Japan

Until Japan seized Taiwan from China in 1895, few would have thought of the Japanese as imperialists. Since the late 1630s, the country had been inward-looking, shutting itself off from nearly all foreign contact.

By the mid-1800s, though, Japan came under U.S. pressure to open its ports to trade. In 1853 President Millard Fillmore sent Commodore Matthew Perry with a fleet of four ships into Edo (Tokyo) Bay. Japan was not yet industrialized, and Japanese people had never seen steamships before. They were awed by the demonstration of American naval strength.

The Japanese government knew that it could not defend itself against a modern navy. It also realized that it could no longer maintain its isolated position in the world. So in 1854 its leaders agreed to a treaty that opened Japan to trade with the United States.

Japan then embarked on a program of rapid modernization. It transformed itself into an industrial power and built a strong military. After taking over Taiwan, Japan began eyeing Korea and the Chinese province of Manchuria. Russia, meanwhile, also wanted these lands.

In 1904 the **Russo-Japanese War** broke out. The conflict took a toll on both sides, and by the following spring, both sides had had enough.

At Japan's request, President Theodore Roosevelt helped negotiate a peace treaty. He met with representatives of the two countries in Portsmouth, New Hampshire, and hammered out a compromise. Roosevelt received the Nobel Prize for Peace for his efforts in negotiating the Treaty of Portsmouth.

Japan was the clear victor in the war with Russia, and it emerged as a major power. It was now the strongest power in East Asia and a rival to the United States for influence in China and the Pacific region. American leaders knew that Japan remained hungry for territory. It had fewer natural resources than the other imperialist nations. In addition, the Japanese government wanted to expand territorially in order to counterbalance U.S. expansion in the Pacific.

Roosevelt decided to impress upon Japan—and the rest of the world—just how powerful the U.S. military was. In 1907 he sent four squadrons of battleships, known as the Great White Fleet, on a 43,000-mile, around-the-world journey. Led by Rear Admiral Charles Sperry, the fleet stopped at 20 ports on six continents, including a port in Japan, before returning home in 1909.

### READING CHECK

#### Identifying the Main Idea

How did the United States influence Japan's economic policies and its imperialist ambitions?

## SECTION 1 ASSESSMENT

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Online Quiz

Keyword: SD7 HP17

### Reviewing Ideas, Terms, and People

- a. Define** What is imperialism?
  - Summarize** What were the main incentives for countries to seek new territories?
  - Evaluate** Do you think imperialists who wanted to spread western culture were arrogant or well meaning? Explain.
- a. Recall** Why did its location make Hawaii attractive to Americans?
  - Draw Conclusions** What role did sugar play in the desire of many Americans to control Hawaii?
  - Elaborate** How did American sugar planters go outside the law to gain control over Hawaii?
- a. Describe** What was the Open Door Policy?
  - Explain** Why did Americans think they might be at a disadvantage in trading with China?
  - Predict** What would have been the likely consequences for the United States if other western powers had divided China into colonies instead of accepting the Open Door Policy?

- a. Identify** Who was Commodore Perry?
  - Analyze** Why did the United States want to impress Japan in particular with the Great White Fleet?

### Critical Thinking

- Identifying Cause and Effect** Copy the chart below and record the effects of key events in Hawaii's history.

Event	Effect

### FOCUS ON WRITING

- Expository** Write an essay about the different perspectives that a Chinese native and a Christian missionary might have had on the Boxer Rebellion. Explain how each might have viewed the Boxers' goals and their means of achieving them.



# SECTION 2

# The Spanish-American War

## BEFORE YOU READ

### MAIN IDEA

A quick victory in the Spanish-American War gave the United States a new role as a world power.

### READING FOCUS

1. How did simmering unrest in Cuba lead to rebellion?
2. Why did Americans get war fever?
3. What happened in the course of the Spanish-American War?
4. Why was annexing the Philippines controversial?

### KEY TERMS AND PEOPLE

José Martí  
William Randolph Hearst  
Joseph Pulitzer  
yellow journalism  
de Lôme letter  
George Dewey  
Emilio Aguinaldo  
Rough Riders  
Battle of San Juan Hill

### TAKING NOTES

As you take notes, identify arguments for the United States to annex the Philippine Islands. Record your notes in a graphic organizer like the one shown here.

## "You Furnish the PICTURES, I'll Furnish the WAR"

### THE INSIDE STORY

**Did a telegram start a war?** In the 1890s rival newspapers owned by William Randolph Hearst and Joseph Pulitzer were competing fiercely. They tried to woo readers with sensational stories and blaring banner headlines.

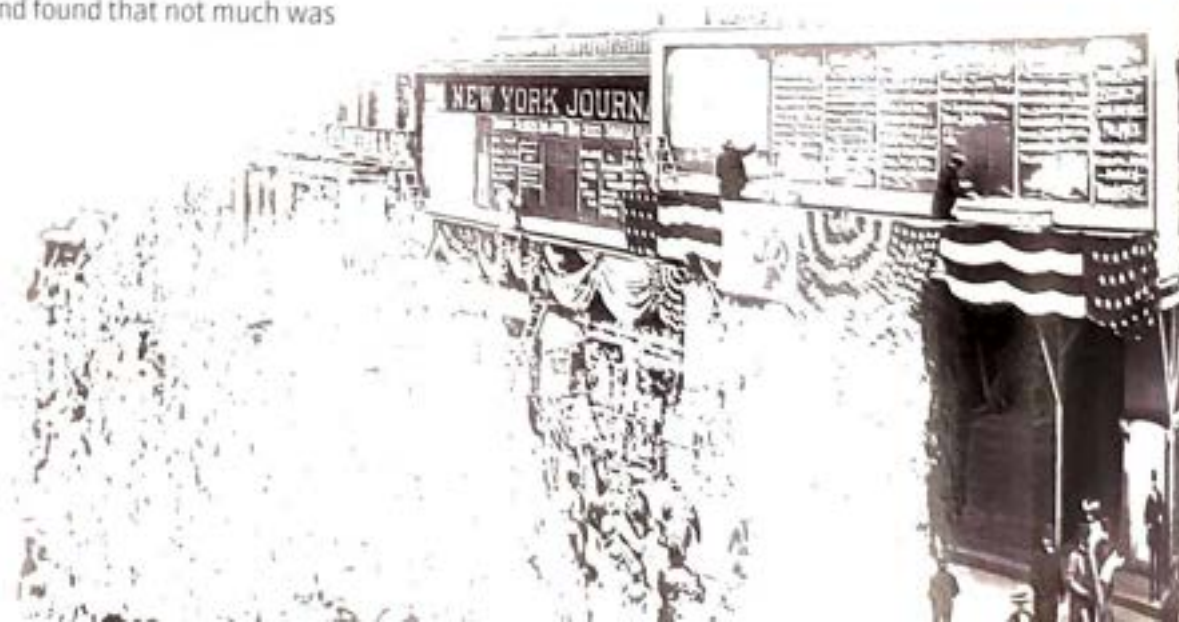
How far would Hearst go? In January 1897 he sent an artist and reporter team to cover the Cuban rebellion against Spanish rule. Frederic Remington was to send drawings of war scenes. Richard Harding Davis would write the dramatic stories. According to one account, Remington spent some time in Cuba and found that not much was

happening in the way of a war. He sent this telegram: "W. R. Hearst, *New York Journal*, N.Y.: Everything is quiet. There is no trouble here. There will be no war. I wish to return. Remington."

Supposedly Hearst answered: "Remington, Havana: Please remain. You furnish the pictures, and I'll furnish the war. W. R. Hearst."

Is the story true? One historian points out that the source was a journalist named James Creelman, who wrote a book about his life as a foreign correspondent for Hearst. Hearst always denied a role in "manufacturing" the war, but the tale fit with people's belief that he would do anything for a good story. Certainly both the *Journal* and its rival, the *New York World*, played up every incident in Cuba. By then Americans were already sympathetic to the Cuban rebels, and perhaps they did not need a push toward war. ■

► War news draws a crowd outside the *New York Journal* offices.





## Simmering Unrest in Cuba

In the 1890s Spain had lost all of its colonies in the Western Hemisphere except for Cuba and Puerto Rico. Cubans in particular were not happy to be part of Spain's empire. Since 1895, Cubans had launched a series of revolts against Spanish rule. Spain responded by exiling leaders of the independence movement.

José Martí was one such leader, exiled in 1878. He moved to New York City, where he continued to promote independence and inspire his fellow Cubans. Through newspaper articles and poetry, Martí urged Cubans to fight for their freedom. He also founded the Cuban Revolutionary Party in 1892 and made preparations to return to his homeland.

Cubans rose once more in revolt against Spain in February 1895. Martí joined them in April, but a month later he was killed in battle. By dying for his country, José Martí immediately became one of Cuba's greatest heroes.

As the revolt raged on, Spain sent General Valeriano Weyler to suppress the rebels in 1896. Weyler forced thousands of civilians into camps controlled by the Spanish army to keep them from aiding the rebels. However, nearly one-third of the Cubans in the camps died from starvation or disease. Weyler's mistreatment of these civilians shocked Americans.

### READING CHECK

**Summarizing** How did José Martí inspire other Cubans to seek independence?

## Americans Get War Fever

Many Americans were already sympathetic to the Cuban cause. They believed the Cubans' struggle was similar to their own during the American Revolution. They became even more supportive after learning how Cuban civilians were suffering under General Weyler.

**The media's role** In this era before radio, television, or the Internet, most people got their news from daily or weekly newspapers. At one point, New York City had as many as 15 daily newspaper editions.

Two of the most widely read papers were the *New York Journal*, published by William Randolph Hearst, and the *New York World*, published by Joseph Pulitzer. Both papers told scandalous stories and splashed large,

shocking illustrations across their pages. This style of sensationalist reporting became known as **yellow journalism**, named after the "Yellow Kid," a popular comic strip that ran in the *World*. Determined to compete with the *World* in every way, the *Journal* created its own "yellow kid" comic, and the rivalry between the two papers became a competition between the two "yellow kids."

The *Journal* threw its support behind the Cuban rebels and refused to use any Spanish sources for news stories. Relying only on Cuban sources made the *Journal's* stories biased, but it also made for exciting reading—and sold more papers.

Not to be left behind, the *World* abandoned all attempts at objectivity. It used the same strategy as the *Journal*, and newspaper sales went up. People could not get enough of the dramatic stories printed daily.

**The explosion of the Maine** Hearst felt strongly that the United States should intervene in Cuba. As a result, the *Journal* continued the drumbeat for war. In 1897 Hearst sent artist Frederic Remington to Cuba to create illustrations showing Spanish cruelty. Hearst printed those drawings in his papers to stir up more support for war with Spain.

President William McKinley was reluctant at first to involve the United States in the conflict. Events soon changed McKinley's

### THE IMPACT TODAY

#### Culture

Today's most prestigious award in journalism is the Pulitzer Prize, funded by Joseph Pulitzer in his will.

### FACES OF HISTORY

**William R. HEARST**  
1863–1951



An outgoing and controversial man, William Randolph Hearst built a vast publishing empire. He began his career managing the *San*

*Francisco Examiner*. At the height of his success, he owned 28 major newspapers and 18 magazines, along with various news services, radio stations, and movie companies. Hearst even served in the House of Representatives but was defeated in his efforts to become the mayor of New York City, and later the governor of New York State.

Orson Welles's 1941 film *Citizen Kane* depicted Hearst's extravagant life. It became one of the most popular films of all time.

**Drawing Conclusions** Many film critics consider *Citizen Kane* to be one of the best movies ever made. Why might Hearst's life make an interesting story?



## Editorial

The *New York Journal* published this editorial on February 11, 1898, after the *Maine* exploded.

"To five hundred thousand Cubans starved or otherwise murdered have been added an American battleship and three hundred American sailors lost as the direct result of the dilatory [slow] policy of our government toward Spain. If we had stopped the war in Cuba when duty and policy alike urged us to do[,] the *Maine* would have been afloat today . . .

It was an accident, they say. Perhaps it was, but . . . it was an accident of a remarkably convenient kind for Spain. Two days ago we had five battleships in the Atlantic. Today we have four. A few more such accidents will leave us at the mercy of a Spanish fleet."

## Skills Focus

## READING LIKE A HISTORIAN

1. **Analyzing Primary Sources** Whom does the *Journal* blame for the deaths on the *Maine*?
2. **Recognizing Bias** What suggests that the *Journal* is biased against Spain?

See **Skills Handbook**, pp. H28–H29, H33

mind. On February 9, 1898, the *Journal* published a letter written by Enrique Dupuy de Lôme, Spain's minister to the United States. The letter had fallen into the hands of a Cuban spy who sold it to Hearst. The **de Lôme letter** ridiculed McKinley for being "weak and catering to the rabble." Americans were outraged at the remarks. The *Journal* called it "the worst insult to the United States in its history."

Furious Americans began clamoring for war with Spain. Then came the final straw: a violent tragedy in Havana Harbor that brought relations with Spain to a breaking point. The battleship USS *Maine* had been sent to Havana to protect American lives and property. On February 15, 1898, the *Maine* mysteriously blew up, killing 260 sailors.

"DESTRUCTION OF THE WAR SHIP MAINE WAS THE WORK OF AN ENEMY!" screamed the *Journal's* headline, although

there was no proof of this. Some historians believe that a fire in a coal storage room caused the explosion. At the time, however, Americans blamed Spain. "Remember the *Maine*!" was the rallying cry of war supporters.

At the time, an inquiry into the explosion confirmed public perceptions, blaming a mine for destroying the *Maine*. In late March, President McKinley demanded that Spain grant Cuba its independence. When Spain refused, Congress declared a state of war on April 2, 1898. The Spanish-American War had begun.

## READING CHECK

## Making Inferences

How did the *Journal* jump to the conclusion that the Spanish were responsible for the explosion of the *Maine*?

## The Course of the War

Although its impact would be felt for years, the Spanish-American War lasted only about five months. It was fought on two fronts: Cuba and the Philippines.

**War in the Philippines** The Philippines are a group of islands located east of Vietnam between the Philippine Sea and the South China Sea. Spain had claimed the islands since the 1500s.

Before the United States declared war on Spain, Theodore Roosevelt (then the assistant secretary of the navy) sent secret orders to Commodore **George Dewey**, the commander of the U.S. Navy's Asiatic Squadron. If war broke out between the United States and Spain, Dewey's assignment was to attack the Spanish fleet in the Philippines.

Once Dewey received word that war had been declared, his squadron rushed to Manila Bay in the Philippines. Early on the morning of May 1, 1898, the Spanish fleet opened fire, but the American forces were out of range. Dewey had his sailors hold their fire for nearly half an hour, until they came within striking distance of the Spanish ships. Dewey did not want to waste ammunition, because the nearest American point of resupply was in California, some 7,000 miles away.

Finally, Commodore Dewey quietly told Charles Gridley, the captain of the flagship *Olympia*, "You may fire when ready, Gridley." The Americans had the advantage of modern ships with iron and steel hulls, as well as



superior weaponry. They were soon inflicting heavy damage on the old-fashioned wooden ships of the enemy.

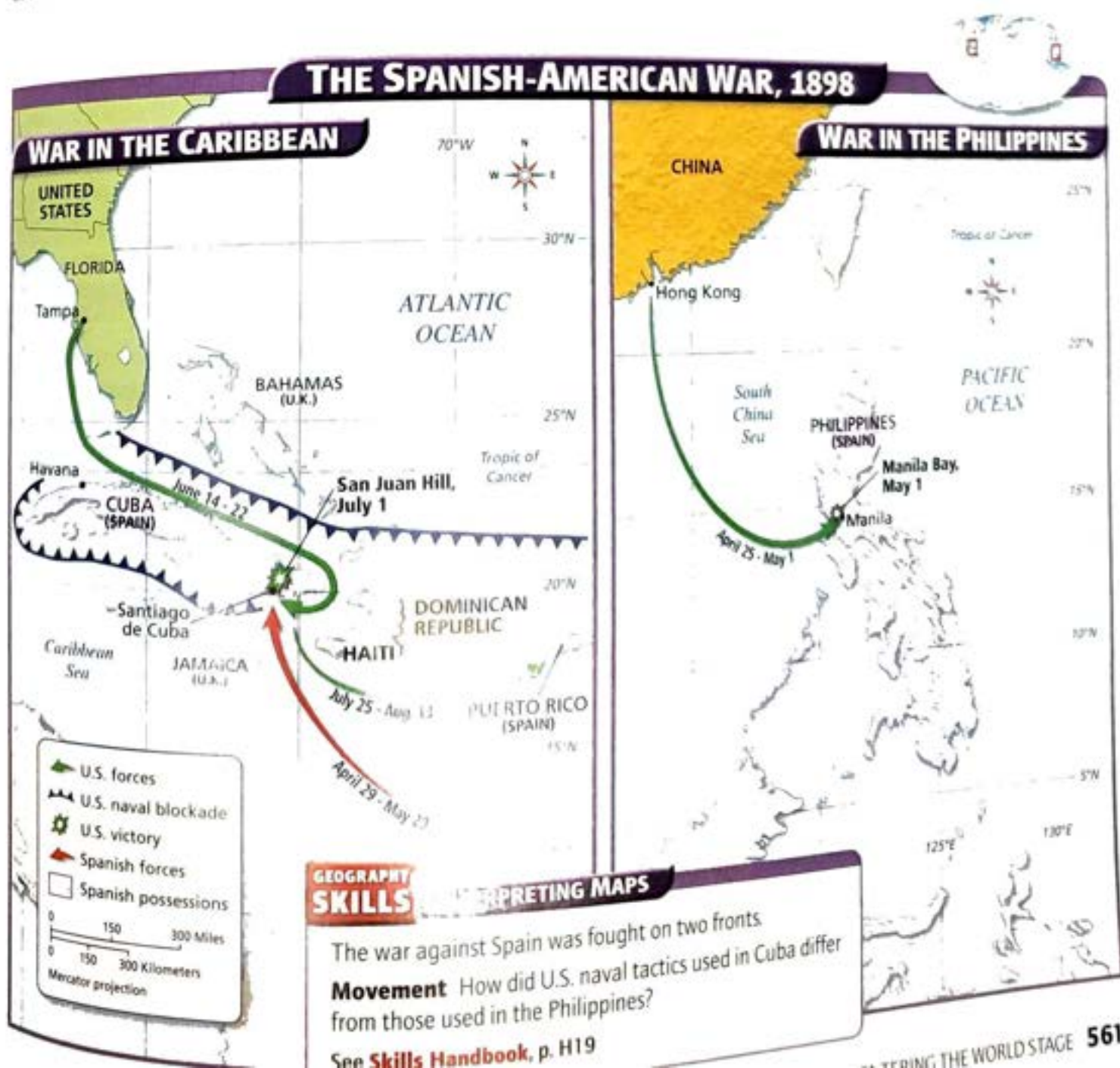
Then two hours into the battle, Captain Gridley reported that the *Olympia* was low on ammunition. Dewey decided to withdraw from battle so that the ships could redistribute their remaining supplies. To keep morale up, he told his men they were taking a break to eat breakfast. During the break, however, Dewey learned that the report about the ammunition was incorrect. The *Olympia* had plenty of supplies for the rest of the battle.

The Americans continued fighting shortly before noon. Soon the entire Spanish fleet was ablaze and sinking. In a matter of hours, the United States had won a decisive victory. Not a single American life was lost, but nearly 400 Spaniards were injured or killed in the Battle of Manila Bay.

Dewey then began planning an attack on the capital city of Manila. He found a willing partner in **Emilio Aguinaldo**, leader of a rebel army of Filipino patriots. Filipinos had been fighting for independence from Spain for two years. While Dewey's warships remained in the harbor, Aguinaldo's army captured Manila. Cut off by Dewey's fleet and surrounded by Aguinaldo's rebels, Spanish forces in the Philippines surrendered on August 14, 1898.

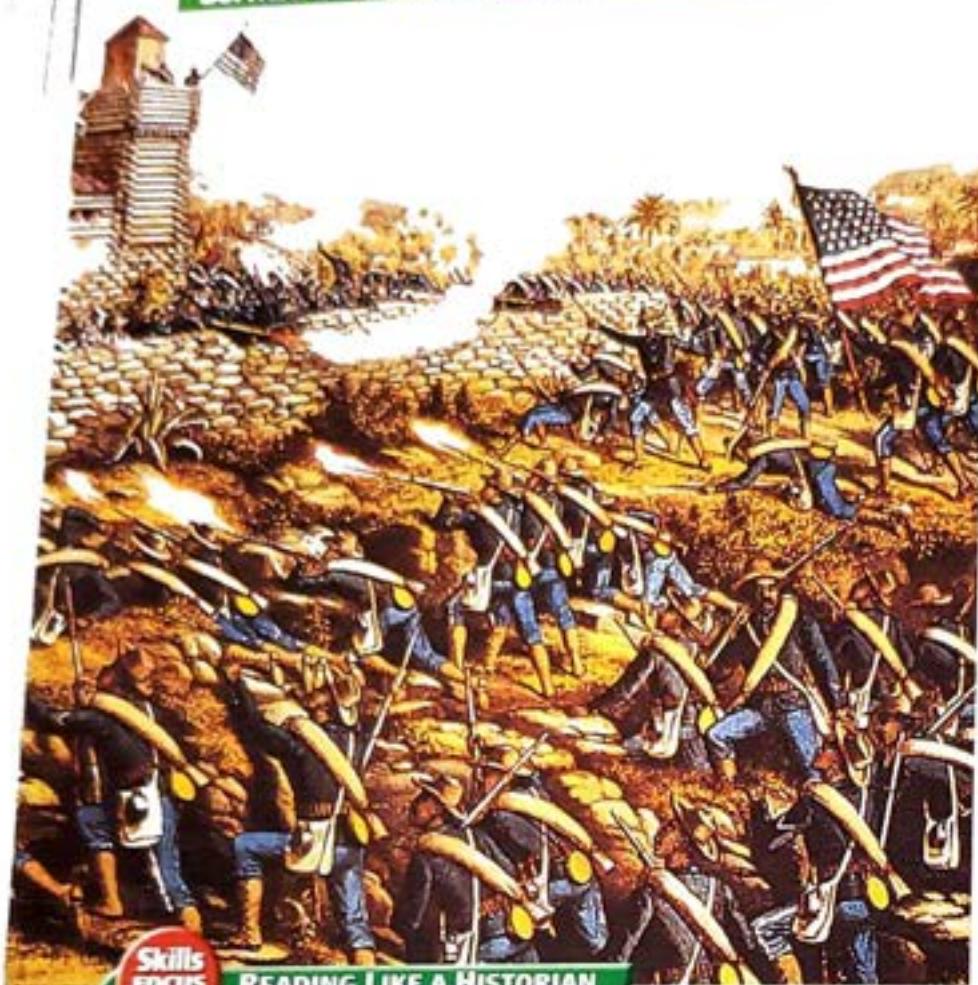
**The war in Cuba** Days before declaring war, Congress had recognized Cuba's independence and adopted the Teller Amendment. This stated that once Cuba freed itself from Spanish rule, the United States would "leave the government and control of the Island to its people."

Victory in Cuba proved difficult to achieve, however. The U.S. War Department was not as prepared as it should have been for the conflict.





## BUFFALO SOLDIERS AND ROUGH RIDERS



**Skills  
FOCUS**

**READING LIKE A HISTORIAN**

Some 10 African American regiments were called to serve in the Spanish-American War. The Ninth and Tenth Cavalries are shown here with the Rough Riders at the Battle of Kettle Hill.

**Interpreting Visuals** What marks these soldiers as Americans?

For example, it equipped soldiers with woolen uniforms for a summer war in a tropical climate. The mess pans—tin plates issued to soldiers—were left over from the Civil War. The canned meat in Cuba was so sickening that soldiers called it “embalmed beef.”

Most of the soldiers who fought in Cuba were enlisted men (also called regulars), but there were many volunteers as well. The most famous volunteers were the **Rough Riders**, a regiment organized by Theodore Roosevelt after he left his navy post. Adventurous college athletes, cowboys, ranchers, and miners all joined the Rough Riders. They expected to fight on horseback, but because the transport ships to Cuba were overbooked, they had

to leave their horses behind in America. The Rough Riders ended up functioning as foot soldiers instead of as a cavalry.

The American strategy in Cuba was to capture the port city of Santiago. U.S. troops needed to control the hills around the city. On July 1, one U.S. division seized the hill at Caney after a four-hour fight.

That same day, some 8,000 U.S. troops fought to take control of Kettle and San Juan hills. Experienced African American soldiers of the Ninth and Tenth Cavalries—known as Buffalo Soldiers—led the charge, supported by the Rough Riders and regulars. Theodore Roosevelt described how the Rough Riders stayed the course.

### HISTORY'S VOICES

“We were still under a heavy fire and I got together a mixed lot of men and pushed on, driving the Spaniards through a line of palm-trees, and over the crest of a chain of hills. When we reached these crests we found ourselves overlooking Santiago.”

—Theodore Roosevelt, *The Rough Riders*, 1898

By nightfall, U.S. troops controlled the ridge above Santiago. For their heroic actions in the **Battle of San Juan Hill**, six of the Buffalo Soldiers and two Rough Riders—including Theodore Roosevelt—received the Medal of Honor.

On July 3, the U.S. Navy sank the entire Spanish fleet off the coast of Cuba in the **Battle of Santiago**. Two weeks later, Spanish troops in Cuba surrendered. Soon after, U.S. troops defeated Spanish forces in Puerto Rico.

**Consequences of the war** The terms of the peace treaty proved costly for Spain. The Spanish had to give up all claims to Cuba and cede Puerto Rico and the Pacific island of Guam to the United States. Spain also turned control of the Philippines over to the United States in exchange for a \$20 million payment.

For Americans, the victory in the Spanish-American War was sweet. John Hay, the ambassador to Great Britain, summed up his view in a letter to Theodore Roosevelt.

### HISTORY'S VOICES

“It has been a splendid little war, begun with the highest motives, carried on with magnificent intelligence and spirit, favored by that fortune which loves the brave.”

—John Hay, letter to Theodore Roosevelt



Still, the United States paid a heavy toll for the war. The monetary costs amounted to roughly \$250 million. In addition, some 2,000 soldiers died, not from battle wounds but from yellow fever.

Despite the lives lost and the dollars spent, the Spanish-American War had a huge payoff for the United States. Senator Henry Cabot Lodge of Massachusetts noted that although the war was very brief, "its results were many, startling, and of world-wide meaning."

The United States now moved into the ranks of imperialist nations. Its new overseas territories gave it more bases for trade and for resupplying its navy. Within a year, it would capitalize on its new economic and military strength to acquire the Pacific island of Samoa. Expansionists expressed delight over the country's growing power, but the quest for empire troubled many Americans.

#### READING CHECK

#### Making Generalizations

How did the United States benefit from the war?

## Annexing the Philippines

After the Spanish-American War, a controversy raged in the United States over whether to annex the Philippines. Some Americans were uneasy with the idea of controlling overseas territories. Others believed that imperialism not only made the United States stronger but also benefited those under colonial rule.

**Arguments for annexation** Some people who favored annexation believed that the United States had a duty to spread its values overseas. President McKinley, for example, spoke of the need "to educate the Filipinos, and uplift and civilize and Christianize them."

Other Americans wanted the Philippines for their economic and strategic value. Located on the route to China, the Philippines would be useful as a place to refuel and resupply ships. For that reason, many expansionists wanted to annex the Philippines before they fell into the hands of Germany, Japan, or another nation.

### COUNTERPOINTS

# Annexation of the Philippines

**Senator Henry Cabot Lodge argued that the United States should annex the Philippines.**

"The taking of the Philippines does not violate the principles of the Declaration of Independence, but will spread them among a people who have never known liberty and who in a few years will be ... unwilling to leave the shelter of the American flag."

**Henry Cabot Lodge, 1900**

**Senator George F. Hoar favored independence for the Philippines.**

"Now, I claim that under the Declaration of Independence you cannot govern ... a foreign people ... against their will, because you think it is for their good, when they do not ... You have no right at the cannon's mouth to impose on an unwilling people ... your notions of freedom and notions of what is good."

**George F. Hoar, 1899**

#### THINKING LIKE A HISTORIAN

**Comparing** How does each senator invoke the Declaration of Independence in his argument?

See **Skills Handbook**, p. H10



**Opponents' views** Americans who opposed annexing the Philippines felt strongly, too. Some reasoned that annexation would violate the ideal of self-government—the **foundation** of the American system. They formed the Anti-Imperialist League in June 1898.

Many African Americans worried about exporting oppression to the Philippines. A group of activists called the Colored Citizens of Boston argued that with racism and violence still painfully common at home, “the duty of the President and country is to reform these crying domestic wrongs and not attempt the civilization of alien peoples by powder and shot.”

Other Americans feared that annexing the Philippines would open the doors to a flood of new immigrants. Samuel Gompers, the leader of the American Federation of Labor, believed that this would hurt American workers.

**American rule** After a fierce debate, the Senate narrowly approved the treaty calling for annexation of the Philippines. The measure passed on February 6, 1899.

Filipino nationalists were infuriated. They had been fighting for independence from Spain for years. Now they had exchanged one set of rulers for another.

Emilio Aguinaldo had already set up a government and proclaimed himself president of the new Philippine Republic. He warned that he was prepared to take military action if the United States tried to assume control of the Philippines.

To no one's surprise, fighting broke out. For three years, Filipino independence fighters battled U.S. soldiers. Aguinaldo was finally captured by the Americans and forced from power in 1901. By the time the rebellion ended, more than 4,000 U.S. soldiers and some 220,000 Filipinos had died, many from disease.

In taking over the Philippines, the stated goal of the United States was to prepare the islands for independence. Therefore, although Congress put a U.S.-appointed governor in charge, Filipinos were also allowed a voice in governing. At first they could only elect members to the lower house of their legislature. Then in 1916, Filipino voters won the right to elect both houses of their legislature. Three decades later, on July 4, 1946, the United States finally granted full independence to the Philippines.

**READING CHECK** **Identifying Cause and Effect** What were some of the effects of American annexation of the Philippines?

## SECTION 2 ASSESSMENT

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Online Quiz

Keyword: SD7 HP17

### Reviewing Ideas, Terms, and People

- a. Recall** By the 1890s, how did Cubans view Spanish rule?

**b. Explain** How did José Martí promote the Cuban cause from New York City?

**c. Evaluate** Did General Weyler's actions toward civilians help or hinder the Spanish cause? Explain.
- a. Define** What was yellow journalism?

**b. Draw Conclusions** Why was the sinking of the USS *Maine* significant?

**c. Elaborate** Was the press irresponsible in covering the buildup to the Spanish-American War? Why or why not?
- a. Identify** What were the key battles during the Spanish-American War?

**b. Summarize** What were the terms of the peace treaty?

**c. Predict** If the United States had lost the Spanish-American War, do you think it would have been more or less likely to continue its quest for empire? Explain.
- a. Recall** Why were the Philippines of strategic importance to the United States?

**b. Make Inferences** Why might Emilio Aguinaldo and other Filipino nationalists have felt betrayed by the United States?

**c. Evaluate** Was the United States justified in not granting immediate independence to the Philippines? Why or why not?

### Critical Thinking

- Contrasting** Copy the chart below and record the reasons why some Americans supported annexation of the Philippines and others opposed it.

Supporters	Opponents

### US ON WRITING

- Narrative** Imagine that you were aboard the *Olympia* during the Battle of Manila Bay or that you were with the Rough Riders during the Battle of San Juan Hill. Write a letter to a friend back home telling about your experiences and your feelings.



# Roosevelt and Latin America

## BEFORE YOU READ

### MAIN IDEA

The United States began to exert its influence over Latin America in the wake of the Spanish-American War.

### READING FOCUS

1. How did the United States govern Cuba and Puerto Rico?
2. Why and how was the Panama Canal built?
3. What was the Roosevelt Corollary?
4. How did Presidents Taft and Wilson reshape U.S. diplomacy?

### KEY TERMS AND PEOPLE

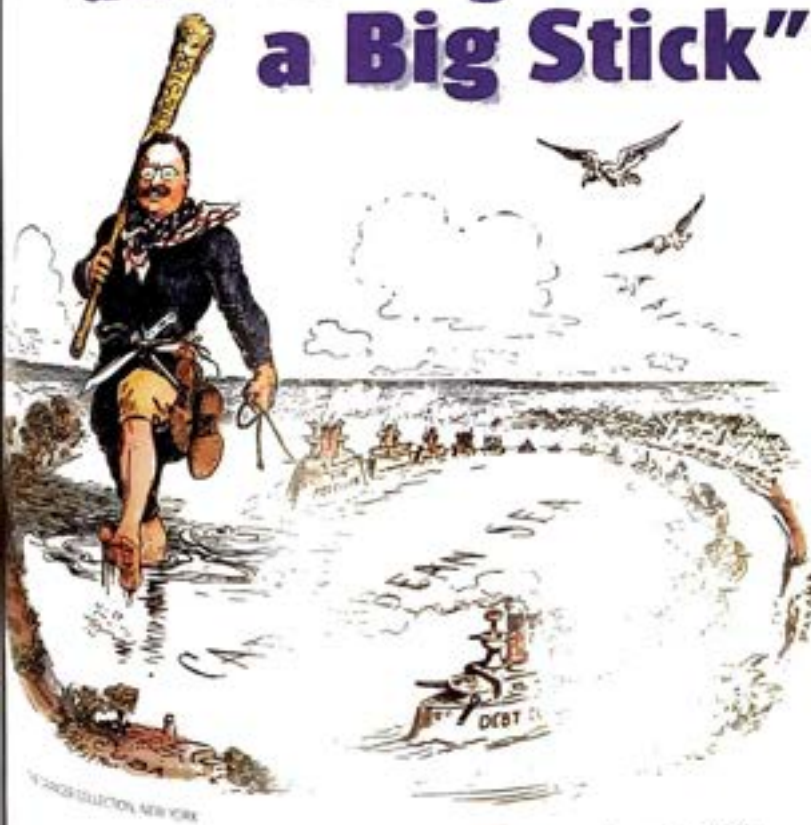
Platt Amendment  
protectorate  
Foraker Act  
Roosevelt Corollary  
dollar diplomacy

### TAKING NOTES

As you read, take notes on U.S. intervention in Latin America. In each of the small circles in a diagram like the one below, identify one way the United States intervened in Latin America. You may need to add more circles.



## "Speak Softly and Carry a Big Stick"



▲ Roosevelt uses a "big stick" to control the Caribbean region.

### THE INSIDE STORY

#### How did President Roosevelt get the Canal Zone?

Theodore Roosevelt was a man of action with a vigorous foreign policy. He often quoted a West African proverb: "Speak softly and carry a big stick; you will go far."

Roosevelt's "big stick" was naval power. As president, he built up the Great White Fleet. It helped achieve his dream—a canal that would let ships sail between the Atlantic and the Pacific without going around South America. The canal site was in Panama, which was then a province of Colombia.

Under pressure, Colombian diplomats agreed to lease a canal zone across Panama for a one-time payment of \$10 million and a yearly fee of \$250,000. The Colombian senate, however, rejected the deal and demanded more money.

Then various groups with a stake in the canal stepped in to encourage a revolution in Panama. In November 1903, the USS *Nashville* lingered off the coast. American marines landed to "maintain order," preventing Colombian troops from stopping the rebels. Within three days, the government of newly independent Panama agreed to the original treaty. Work on the canal could begin! ■



## Cuba and Puerto Rico

After the Spanish-American War, the United States began to expand its power in Latin America. To restore order in Cuba and Puerto Rico after the war—and to protect American investments—President William McKinley set up military governments on each island.

**Yellow fever in Cuba** President McKinley appointed Leonard Wood as governor of Cuba in 1899. During Wood's term in office, scientists made significant steps toward eliminating yellow fever. The disease had reached epidemic levels among American troops in Cuba. As many as 85 percent of the people infected with yellow fever died.

U.S. Army doctors Walter Reed and William C. Gorgas studied the problem. Cuban doctor Carlos Juan Finlay had theorized that mosquitoes spread yellow fever. Within a year, Reed and Gorgas had proven Finlay's theory. Then Gorgas organized a plan to drain all pools of standing water, where mosquitoes bred. Within six months, yellow fever had been virtually eliminated from the city of Havana.

**U.S. control over Cuba** Wood also oversaw the drafting of a new Cuban constitution in 1901. The United States had already declared with the Teller Amendment of 1898 that it would not annex Cuba. After the Spanish-American War, however, the United States feared that other imperialist nations might try to take control of Cuba or undercut American business interests there.

As a result, the United States forced Cuba to include the **Platt Amendment** as part of its new constitution. The amendment limited Cuba's ability to sign treaties with other nations. At the same time, it gave the United States the right to intervene in Cuban affairs. The amendment also required Cuba to sell or lease land to the United States for naval and coaling stations. This last clause led to the establishment of a U.S. naval base at Guantánamo Bay.

The Platt Amendment made Cuba a U.S. **protectorate**—a country under the control and protection of another country. After Cuba accepted the Platt Amendment, U.S. troops withdrew. The amendment was eventually repealed, but the United States retained its lease on the naval base at Guantánamo Bay.

### THE IMPACT TODAY

#### Government

Since the terrorist attacks of September 11, 2001, the base at Guantánamo has housed prisoners suspected of terrorist activity.

## PRIMARY SOURCES

### Political Cartoon

This cartoon reflects the debate at the end of the Spanish-American War over what should be done with new U.S. territories.

In the caption Uncle Sam says, "These little shavers [kids] seem to like it here. I wonder had I better keep 'em all in the family?"

The children at the table represent lands taken over by the United States in the 1890s.



Lady Liberty was often paired with Uncle Sam in political cartoons, representing America's ideal parents.

- 1. Interpreting Political Cartoons** Why do you think the artist used a Thanksgiving scene?
- 2. Recognizing Bias** How does this cartoon portray the peoples of the acquired lands?

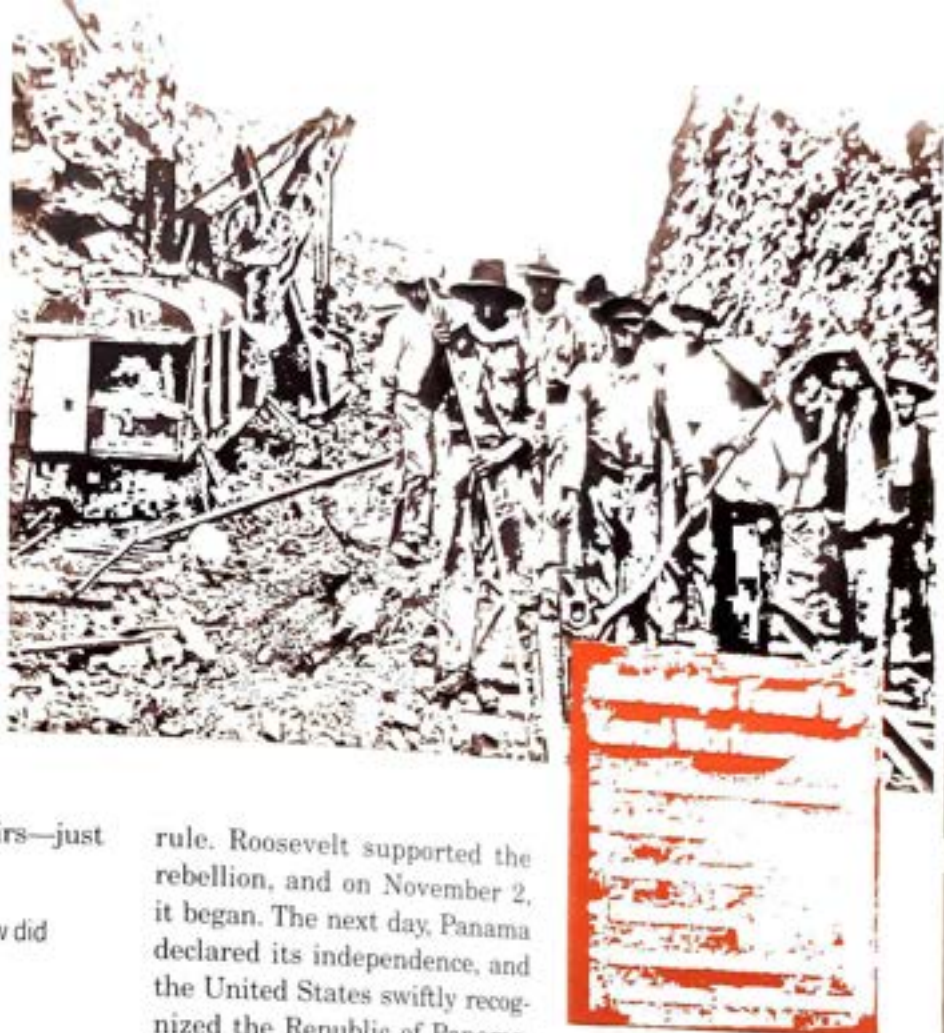
See **Skills Handbook**, pp. H31, H33



**Governing Puerto Rico** The United States did not make Puerto Rico a protectorate. Instead, it governed Puerto Rico as a territory, as it did the Philippines. The **Foraker Act** of 1900 established that the United States would appoint Puerto Rico's governor and the upper house of its legislature. Puerto Rican voters would elect the lower house.

A 1917 law granted U.S. citizenship to Puerto Ricans. It also allowed Puerto Rican voters to elect all of their legislative representatives. In 1952 Puerto Rico became a self-governing commonwealth of the United States. Today the Puerto Rican government has power over most of its domestic affairs. The U.S. government still controls certain matters though—interstate trade, immigration, and military affairs—just as it does for U.S. states.

**READING CHECK** **Summarizing** How did Cuba become a U.S. protectorate?



## The Panama Canal

For decades, people had dreamed about a faster way to move between the Atlantic and Pacific oceans without having to travel all the way around South America. In the 1880s a French company tried to solve this problem. It began building a canal across the 50-mile-wide Isthmus of Panama, which was then part of the Republic of Colombia. Facing many obstacles, the company eventually went bankrupt and abandoned the canal.

**U.S. interest in a canal** In 1902 the United States bought the rights to the French canal property and equipment. Secretary of State John Hay began negotiations with Colombia to gain permanent use of the strip of land that the canal would cut through. By 1903 a treaty for a canal zone had been drafted, but Colombia's senate would not ratify it.

**Panama's revolution** President Theodore Roosevelt had a keen interest in building the canal. Meanwhile, Panamanian revolutionaries were plotting to break free of Colombian

rule. Roosevelt supported the rebellion, and on November 2, it began. The next day, Panama declared its independence, and the United States swiftly recognized the Republic of Panama. Soon afterward, a new treaty with Panama gave the United States complete and unending sovereignty over a 10-mile-wide Canal Zone.

**Building the Panama Canal** American work on the Panama Canal began in May 1904. Harsh working conditions and shortages of labor and materials hampered construction efforts. The situation grew worse when a serious outbreak of yellow fever hit.

To put the project back on track, Roosevelt appointed John F. Stevens as chief engineer and architect. Stevens tackled the technical problems while the army colonel Dr. William C. Gorgas focused on improving sanitation and health. Wiping out yellow fever was one goal, but malaria was an even greater threat. Unlike yellow fever, which gave survivors immunity, malaria could strike people again and again. During the first month of U.S. construction activity, nearly the entire workforce had been stricken with malaria.

Eliminating the mosquitoes that spread malaria was a huge task. Sanitation workers drained swamps, cleared vegetation, spread oil



on pools of standing water, and bred spiders, ants, and lizards to feed on the adult mosquitoes. By 1913 malaria was almost eliminated.

Meanwhile, John F. Stevens resigned in 1907, and Lt. Col. George W. Goethals continued the mammoth task of coordinating the construction—not just the canal but all the housing and other facilities needed for workers. His efforts led him to be called the Genius of the Panama Canal.

More than 60 giant steam shovels bit into the land, digging out hundreds of train-car loads of earth each day. Up to 44,000 workers, many recruited from the British West Indies, labored on the project at a time. There were frequent accidents, lost equipment, and deaths—but there was also progress. In August 1914 the SS *Ancon* became the first ship to pass officially through the Panama Canal.

**READING CHECK** **Drawing Conclusions** Why did the United States get involved in Panama's rebellion against Colombian rule?

## The Roosevelt Corollary

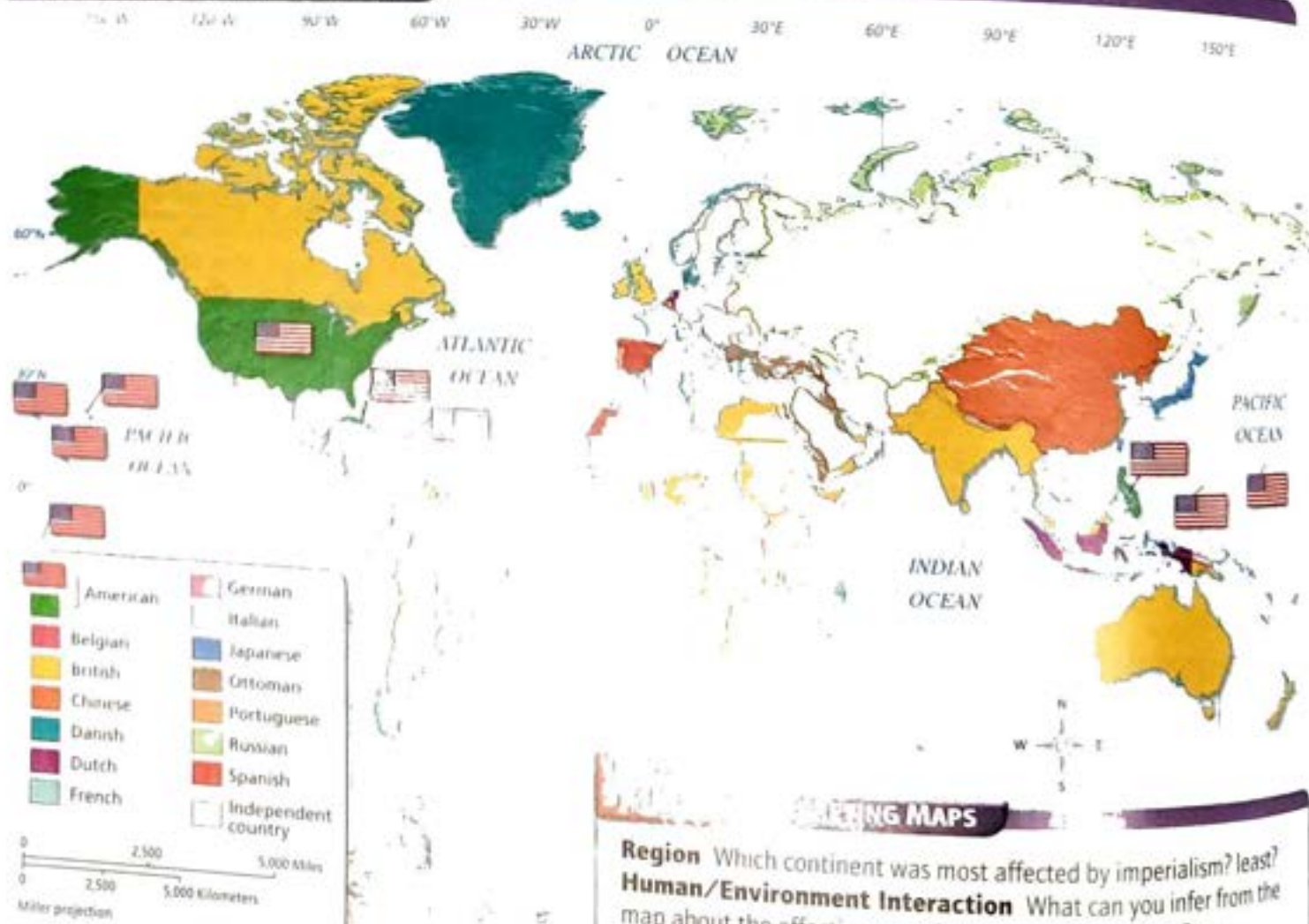
The Monroe Doctrine, proclaimed in 1823, declared the Western Hemisphere off-limits to further colonization by European nations. For much of the 1800s, however, the Monroe Doctrine was only an idle threat.

After the Spanish-American War, however, presidents began to back up the Monroe Doctrine with military strength. They wanted to protect American economic interests in Latin America.

In the late 1800s Europeans and Americans invested large sums of money in Latin America, which had a wealth of laborers, consumers, and raw materials. Much of this investment came in the form of high-interest bank loans, which many Latin American countries found difficult to repay. Foreign powers often intervened to collect the loans.

In 1904 the Dominican Republic was unable to repay its European lenders. Fearing that the Europeans would use force to collect

## IMPERIALISM, c. 1900





the debts. President Roosevelt decided to take a tough policy stand. Without seeking approval from any Latin American nation, he issued the **Roosevelt Corollary** to the Monroe Doctrine.

#### HISTORY'S VOICES

“Chronic wrongdoing . . . in the Western Hemisphere . . . may force the United States, however reluctantly . . . to the exercise of an international police power.”

—Theodore Roosevelt, Roosevelt Corollary, 1904

Roosevelt was putting into practice one of his favorite proverbs: “Speak softly and carry a big stick; you will go far.” Applying this “big stick” policy to the situation in the Dominican Republic, the United States pledged to use armed forces to prevent any European country from seizing Dominican territory.

Roosevelt hoped to avoid a military confrontation. To ensure that the Europeans were repaid, the United States took control of collecting all Dominican customs duties.

The Roosevelt Corollary succeeded in bringing more stability to the region and keeping other nations out. But America’s willingness to use its police power made many Latin Americans uneasy. They worried about continued U.S. involvement in their affairs.

#### READING CHECK

#### Identifying Problems and Solutions

Why did Roosevelt decide to announce the Roosevelt Corollary?

## Reshaping U.S. Diplomacy

During the presidency of William H. Taft, U.S. influence in Latin America deepened. Taft believed in advancing U.S. interests in other countries through **dollar diplomacy**, a policy of promoting American economic interests in other countries and using that economic power to achieve American policy goals.

To reduce the chances of European interference in Latin America, Taft suggested that Americans buy out European loans. By 1914 Americans had invested more than \$1.6 billion in Latin America, mainly in mines, railroads, and banana and sugar plantations.

Dollar diplomacy, however, caused resentment. In Nicaragua, for example, American banks made loans to the government and became heavily involved in the economy. In 1912 President Taft had to send in U.S. troops to quell an uprising against the authorities.

President Woodrow Wilson, who succeeded Taft in 1913, rejected the **concept** of dollar diplomacy in favor of moral diplomacy, the use of persuasion and American ideals to advance the nation’s interests abroad. Nonetheless, he did send in troops when civil unrest shook Haiti in 1915 and the Dominican Republic in 1916. In both cases, U.S. Marines occupied the countries for years.

#### READING CHECK

#### Contrasting

How did Taft and Wilson differ in their patterns of diplomacy?

#### ACADEMIC VOCABULARY

**concept** abstract notion or idea

## SECTION 3 ASSESSMENT

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Online Quiz

Keyword: SD7 HP17

### Reviewing Ideas, Terms, and People

- Recall** How did the United States govern Puerto Rico?
  - Draw Conclusions** Why did the United States make Cuba a protectorate?
- Identify** What was the Panama Canal Zone?
  - Explain** Why was it important to control malaria and yellow fever in Panama?
  - Predict** What effect do you think the Panama Canal had on American military capabilities?
- Identify** What was the Roosevelt Corollary?
  - Contrast** What did the Roosevelt Corollary do that the Monroe Doctrine had not done?
- Recall** Which president favored **dollar diplomacy**?
  - Evaluate** How effective do you think dollar diplomacy was in Nicaragua?

### Critical Thinking

- Organizing Information** Copy the table below and fill in the names of Latin American lands discussed in this chapter. Then briefly note how the United States became involved in each.

Country or Territory	U.S. Involvement

### FOCUS ON WRITING

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



Caribbean Sea

**Lake Gatún**

Created by damming the Chagres River, this lake's water feeds the lock system and was once the world's largest human-made lake.

**Gaillard Cut**

At the continental divide, the canal route cuts through the lowest point between two hills, 335.5 feet above sea level. For nearly 9 miles, workers blasted loose the rock. Steam shovels loaded the spoil onto railroad cars to be hauled away.

# Building the Panama Canal

Sailors had dreamed of a canal through Central America since the 1500s, but it wasn't until the early 1900s that engineers had the technology to build it. The canal's planners and builders faced considerable geographic obstacles along the 50-mile path.





### Madden Lake and Dam

The lake is used to provide more water to the canal system.

## How Canal Locks Work

1. A ship enters a lock chamber where the water is level with the body of water the ship is leaving.



2. Gates close behind the ship, and the water level in the chamber rises until level with the next body of water.



3. The gates in front of the boat open to let the vessel pass.



### Swamps

When research showed that the malaria-carrying mosquito could not fly far without feeding on vegetation, hundreds of acres were cleared near housing and work sites. To kill the larvae, over 100 square miles of swamps were drained and thousands of gallons of oil were sprayed on the remaining water.

### GEOGRAPHY SKILLS

### INTERPRETING MAPS

1. **Location** What made this part of Panama a good location for a canal?
  2. **Human/Environment Interaction** What obstacles made the canal's construction difficult?
- See **Skills Handbook**, p. H20

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Interactive Map  
Keyword: SD7 CH17

Pacific Ocean



# Wilson and the Mexican Revolution

## BEFORE YOU READ

### MAIN IDEA

American intervention in Mexico's revolution caused strained relations between the two neighbors.

### READING FOCUS

1. How did the Díaz dictatorship spark a revolution in Mexico?
2. How and why did the United States intervene in the Mexican Revolution?
3. How did the Mexican Revolution conclude?

### KEY TERMS AND PEOPLE

Porfirio Díaz  
Francisco Madero  
Mexican Revolution  
Emiliano Zapata  
Francisco "Pancho" Villa  
Victoriano Huerta  
Tampico incident  
Battle of Veracruz  
John J. Pershing

### TAKING NOTES

As you read, take notes identifying major events of the Mexican Revolution. Record your notes in a graphic organizer like the one shown below. You may need to add more rows.

Event	Date

### THE INSIDE STORY

#### Why did Wilson send troops into Mexico?

To many people, Francisco "Pancho" Villa was a bandit, a cattle rustler, even a murderer. To many others, he was a folk hero, a kind of Mexican Robin Hood. Legends and ballads told about his deeds. Villa was a brilliant horse rider, leading a cavalry force called Los Dorados ("Golden Ones") in northern Mexico. In 1911 he helped drive Mexico's dictator out of power.

Two years later, Villa was again at the center of a power struggle. This time he was vying with Venustiano Carranza to lead Mexico. When U.S. president Woodrow Wilson recognized Carranza as president, Villa was furious. In 1916 Villa and his men killed a group of American

mining engineers in Mexico, and then crossed the border to Columbus, New Mexico. In an attack there, Villa's followers killed more Americans.

Wilson was outraged by the raid on American territory. He sent General John J. Pershing into Mexico with a "punitive expedition." With vehicles and even airplanes, they chased Villa through northern Mexico for almost a year. They never caught him.

By 1917 the United States was preoccupied with war in Europe. American forces left Mexico, and Pancho Villa retired to his ranch. In 1923, however, Villa was ambushed and killed. He died as dramatically as he had lived.

## PANCHO VILLA WAGES WAR

◀ Pancho Villa rides to revolution on horseback.



## Dictatorship Sparks a Revolution

When Mexico erupted in revolution in the early 1900s, the United States was drawn into the conflict because of its economic ties with Mexico. But what led to the revolution in the first place?

**The Díaz dictatorship** For most of the period from 1877 to 1910, the dictator **Porfirio Díaz** ruled Mexico. When Díaz came to power, he brought order to Mexico, which had endured decades of war and unrest. However, order came at a price. Díaz jailed his opponents. He did not permit freedom of the press. He used the army to maintain peace at any cost.

Díaz also got money from foreign investors, including many Americans. Their investments helped modernize Mexico very quickly. Railroads expanded. Production of factory goods doubled. Cotton production also doubled. Still, most Mexicans did not enjoy the benefits of modernization. Wealth became concentrated in the hands of foreign investors and a small Mexican elite. Most Mexicans lived in poverty, and opposition to Díaz grew steadily.

**Overthrowing Díaz** In 1910 Porfirio Díaz ran for re-election. As in earlier elections, Díaz controlled the outcome. Just before the voting began, he jailed his opponent **Francisco Madero**, a wealthy landowner but a reform-minded idealist. When the ballots were counted, Díaz claimed he had earned a million votes and Madero had earned fewer than 200.

After being released from jail in September 1910, Madero fled over the border to Texas. There he declared himself president of Mexico and called for a revolution. When Madero returned to Mexico in November, he found bands of rebels already active.

The **Mexican Revolution** unfolded as a series of uprisings in different parts of the country. In the south, **Emiliano Zapata** and his army of mostly Native American peasants—known as **Zapatistas**—wanted land to be returned to the native peoples. They began to seize land by force. Meanwhile, in northern Mexico, **Francisco "Pancho" Villa** and **Pascual Orozco** led a large-scale revolt against Díaz. Rebellion spread, and in May 1911, Díaz resigned and went into exile in France.

**Shaky leadership** In November 1911, Francisco Madero was elected president of Mexico. He tried to establish a democratic government, but he was quickly overwhelmed by the very forces he had unleashed in toppling Díaz. Madero faced challenges from all sides. Even the commander of the government troops, **Victoriano Huerta** (WEHR-tah), proved disloyal. In 1913 Huerta overthrew Madero, imprisoned him, and had him executed soon thereafter. Huerta named himself president of Mexico, but immediately four armies rose up to fight him. The situation in Mexico grew dire.

### READING CHECK

**Sequencing** What major events occurred between the Mexican election of 1910 and the declaration of Huerta as president?

## Turmoil in Mexico

Conflicting visions for Mexico's future led to a series of violent government overthrows.



Porfirio Díaz ruled Mexico as an oppressive dictator from 1877 to 1910. He modernized the country, but kept most of the people impoverished.



Emiliano Zapata led the revolt against Díaz in the south. He and his fellow Zapatistas wanted land returned to Native Americans.



After Díaz fled in the face of revolt, Francisco Madero became president of Mexico. He tried to establish a democratic government.



Victoriano Huerta executed Madero and named himself president. He faced opposition from Mexicans and the United States.



## The United States Intervenes

Many European nations recognized Huerta's government, but the United States did not. President Woodrow Wilson viewed Huerta as an assassin with no legitimate claim to power. In February 1914 Wilson authorized arms sales to Huerta's enemies. For a time, Wilson followed a policy of "watchful waiting." Then came an incident that let him move openly against Huerta.

**The Tampico incident** On April 9, 1914, nine crew members of the USS *Dolphin* went ashore for supplies in the Mexican port of Tampico. There they were arrested by soldiers loyal to Huerta. The Americans were quickly released unharmed, and Mexican officials apologized. However, U.S. Admiral Henry Mayo demanded more than a formal apology from the Mexican government. He also insisted that the Mexicans give the American flag a 21-gun salute within 24 hours. Huerta refused this humiliating demand.

Because of the **Tampico incident**, the president asked Congress on April 20 to authorize the use of armed forces against Mexico. Congress approved the request on April 22, but events in Mexico moved faster.

**Occupying Veracruz** While waiting for Congress to act, President Wilson learned some alarming news. A German ship loaded with weapons for Huerta was heading for the Mexican port city of Veracruz. Without debating further, Wilson ordered the U.S. Navy to seize the city.

Under the cover of a naval bombardment, U.S. Marines then landed at Veracruz. They were met by gunfire from Mexican soldiers, and a violent battle erupted. The Americans had expected to seize control with little bloodshed. Instead, 17 Americans and some 300 Mexicans died during the **Battle of Veracruz**.

For the next six months, U.S. troops occupied the city. The occupation threatened to plunge the United States and Mexico into war. Crisis was avoided, though, thanks to mediation by Argentina, Brazil, and Chile.

Meanwhile, Huerta struggled to stay in power. In June the mediators called for Huerta's resignation and for the creation of a provisional government. Huerta refused. Pressure mounted against him within Mexico and beyond. In July he resigned and fled to Spain.

### READING CHECK

#### Identifying Cause and Effect

**Effect** Why did the United States take action against Huerta's government?



**The Battle of Veracruz**  
The battle of Veracruz was fought on April 21, 1914, between the United States and Mexico. It was a decisive victory for the United States, which secured the port of Veracruz and opened the way for the occupation of Mexico City.



## The Revolution Concludes

With Huerta gone from Mexico, Venustiano Carranza stepped in and declared himself the leader of the Mexican Revolution in August 1914. He faced opposition from Pancho Villa and Emiliano Zapata, however. For some time, it appeared that Villa and Zapata would triumph. This worried American leaders, who feared that U.S. economic interests would be harmed by the land redistribution that Zapata and Villa wanted. President Wilson decided to support the more moderate Carranza.

Pancho Villa retaliated with violence. In March 1916 he led hundreds of troops across the U.S. border to the small, isolated town of Columbus, New Mexico. Striking at dawn, Villa's troops burned the town and killed 17 Americans. This was the first armed invasion of the continental United States since the War of 1812.

**Pursuing Pancho Villa** President Woodrow Wilson quickly ordered a military expedition to hunt down Villa. Within a week, General **John J. Pershing** led more than 10,000 U.S. troops into Mexico. They searched for 11 months but were never able to capture Pancho Villa. The farther Pershing went into Mexican territory, the more the Mexicans resented the Americans.

By early September 1916, nearly 150,000 U.S. National Guard members were stationed along the Mexican border. Wilson realized that the threat of war increased each day that U.S. troops remained in Mexico. Furthermore, America's attention was shifting to Europe, where World War I was raging. In late January 1917, the president called off the search for Pancho Villa and withdrew U.S. troops from Mexico. Nonetheless, for the rest of Wilson's presidency, relations between Mexico and the United States remained strained.

**A new constitution for Mexico** In December 1916, Venustiano Carranza called a constitutional convention. A new constitution went into effect on February 5, 1917. The constitution contained the ideas of all the revolutionary groups. It protected the liberties and rights of citizens.

Despite the new constitution, fighting continued in Mexico until 1920. Mexico's economy suffered terribly. Agriculture was disrupted, mines were abandoned, and factories were destroyed. Many Mexican men and women immigrated to the United States in search of work and a more stable life.

### THE IMPACT TODAY

#### Daily Life

More than 25 million people of Mexican descent now live in the United States.

### READING CHECK

**Summarizing** How did Pancho Villa cause trouble for the United States?

## SECTION 4 ASSESSMENT

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Online Quiz

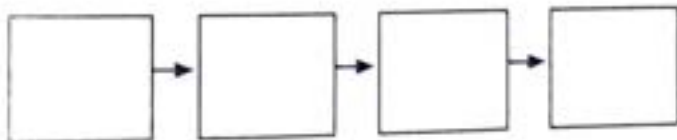
Keyword: SD7 HP17

### Reviewing Ideas, Terms, and People

- Identify** Who was **Porfirio Díaz**?
  - Explain** Why did Mexicans rise up against Díaz?
  - Elaborate** Why do you think that **Francisco Madero** and **Victoriano Huerta** both faced challenges after they claimed Mexico's presidency?
- Recall** What was the **Tampico incident**?
  - Analyze** How did the Tampico incident draw the United States into armed conflict with Mexico?
  - Evaluate** Was the United States justified in launching the **Battle of Veracruz**? Why or why not?
- Describe** What made **Pancho Villa** decide to lead a raid into New Mexico?
  - Draw Conclusions** Why was President Wilson so eager to capture Pancho Villa?
  - Predict** How do you think the expedition to find Pancho Villa affected relations between Mexicans and Americans?

### Critical Thinking

- Sequencing** Copy the flowchart below and record the major sequence of events of the Mexican Revolution, from the overthrow of Díaz to the Constitution of 1917. Add as many boxes as you need.



### FOCUS ON SPEAKING

- Persuasive** Imagine that you are a Mexican revolutionary in 1911, while Porfirio Díaz is still clinging to power. Prepare a speech to give to people in your community, explaining why you oppose Díaz and whom you support in his place. Encourage your listeners to join you in the fight to overthrow Díaz and bring better leadership to Mexico.



# Views on American Expansionism

**Historical Context** The documents below provide information about attitudes regarding American expansion in the late 1800s.

**Task** Examine the documents and answer the questions that follow. Then write an essay about interaction between imperialists and local peoples. Use facts from the documents and the chapter to support the position you take in your thesis statement.

## DOCUMENT 1

Princess Kaiulani, niece of Hawaii's Queen Liliuokalani, visited Washington, D.C., in 1893 to plead for a restoration of the monarchy.

"Seventy years ago, Christian Americans sent over Christian men and women to give religion and civilization to Hawaii. Today, three of the sons of the missionaries are at your capitol, asking you to undo their fathers' work. Who sent them? Who gave them the authority to break the constitution which they swore they would uphold? Today, I, a poor, weak girl, with not one of my people near me and all these statesmen against me, have the strength to stand up for the rights of my people. Even now I can hear their wail in my heart, and I am strong . . . strong in the faith of God, strong in the knowledge that I am right, strong in the strength of seventy million people who in this free land will hear my cry and will refuse to let their flag cover dishonor to mine!"

## DOCUMENT 2

John L. Stevens was the U.S. minister to Hawaii in 1893, when Queen Liliuokalani was forced from the throne. That year, he wrote "The Hawaiian Situation. II. A Plea for Annexation."

"The Hawaiian monarchy being thus extinct, and the Hawaiian Islands being not sufficient to constitute an independent nation, all who really understand their situation know that good government is now the first and imperative need . . . [T]hese Islands have become thoroughly Americanized . . . For sixty years the Islands have had the American school system . . . The two principal daily newspapers are edited, owned, and published by Americans. The principal lawyers at the bar and on the bench are Americans . . . and educated in American colleges. More than eighty percent of the trade, amounting to more than twenty million dollars per year, is with the United States. American newspapers, magazines, and books are in as familiar use in the Islands as in the United States . . .

A paramount reason why annexation should not be long postponed is that, if it soon takes place, the crown and government lands will be cut up and sold to American and Christian Caucasian people, thus preventing the Islands from being submerged and overrun by Asiatics, putting an end to Japanese ambitions stimulated by our strong European rival."



*Puck* was a political magazine that often used humor and satire to address social and political issues. In this magazine cover, the annexation of Hawaii is shown as a marriage between a Hawaiian woman and Uncle Sam. President William McKinley is depicted as a minister, and Alabama senator John T. Morgan stands behind the couple with a shotgun.



ANOTHER SHOTGUN WEDDING, WITH NEITHER PARTY WILLING

# Skills FOCUS

## READING

## HISTORY

1. **a. Recall** Refer to Document 1. Why does Kaiulani feel that she will be successful?
- b. Contrast** In Kaiulani's view, how are the sons of the early missionaries different from their fathers?
2. **a. Identify** Refer to Document 2. What reasons does Stevens give for annexing Hawaii to the United States?
- b. Predict** How might Stevens have responded to a statement like that made by Kaiulani?
3. **a. Identify** Refer to Document 3. What expression is shown on the woman's face?

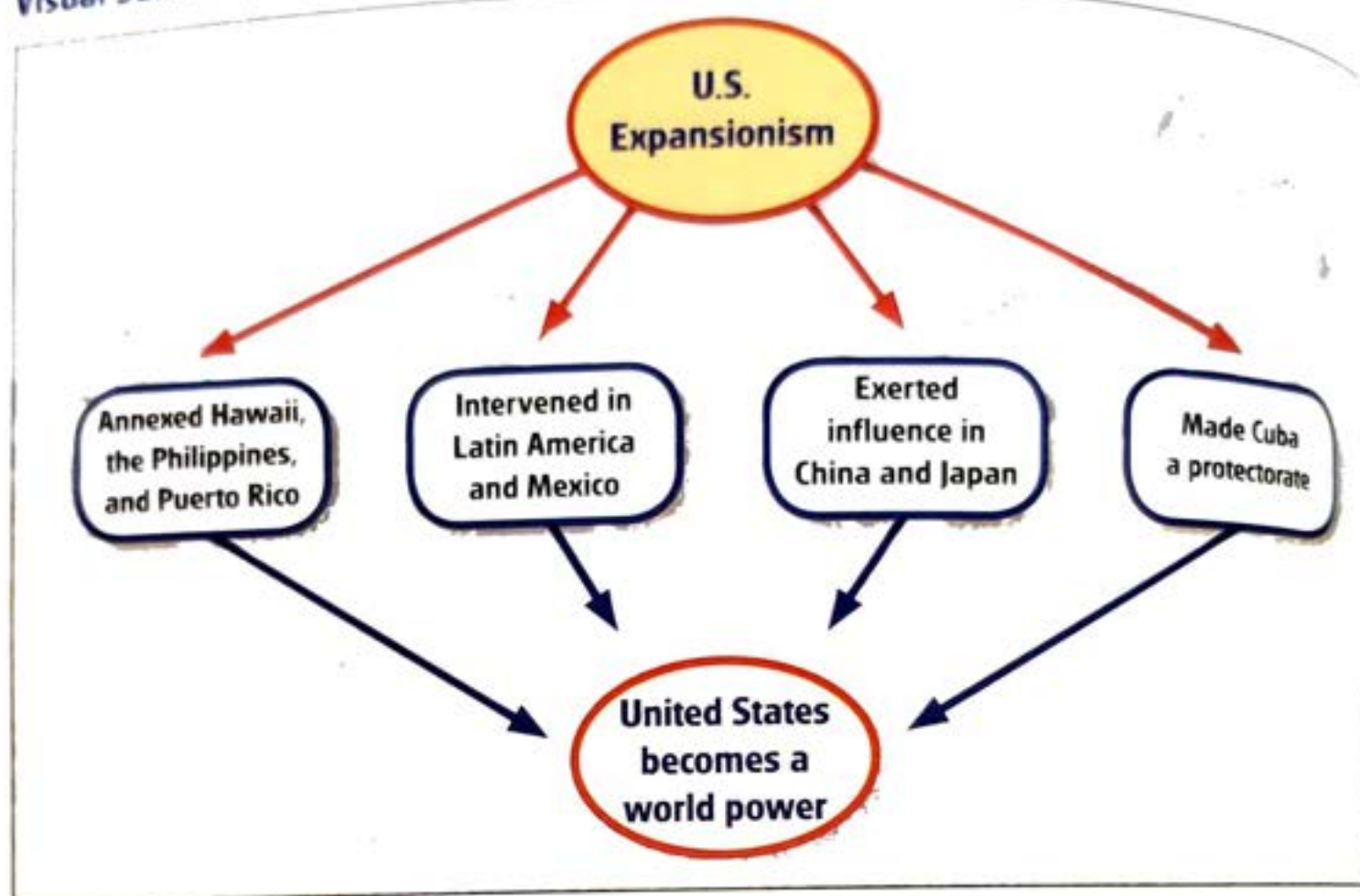
**b. Evaluate** How would you describe the cartoonist's opinion of annexation?

4. **Document-Based Essay Question** Consider the question below and form a thesis statement. Using examples from Documents 1, 2, and 3, create an outline and write a short essay supporting your position.  
What factors influenced the decision to annex Hawaii?

See **Skills Handbook**, pp. H28–H29, H31



## Visual Summary: Entering the World Stage



## Reviewing Key Terms and People

Complete each sentence by filling the blank with the correct term or name.

- In 1887 King Kalakaua was forced to sign the \_\_\_\_\_, which severely restricted his power and denied most Hawaiians the right to vote.
- Imperialist nations carved out \_\_\_\_\_ in China—geographic areas where they dominated politics or the economy.
- The \_\_\_\_\_ was intended to give all nations equal trading rights in China.
- The sensationalist style of news coverage called \_\_\_\_\_ helped sway U.S. public opinion in favor of war with Spain.
- The \_\_\_\_\_ gave the United States the right to intervene in Cuban affairs and to buy or lease land for naval and coaling stations.
- In Latin America and Asia, President Taft practiced \_\_\_\_\_, a policy of substituting economic power for military force.
- The Mexican Revolution began as an effort to overthrow the dictator \_\_\_\_\_.
- The \_\_\_\_\_ occurred on April 9, 1914, when nine U.S. sailors were mistakenly arrested by Mexican soldiers.
- The \_\_\_\_\_ took place after the United States seized a German ship that was carrying weapons to Mexican president Victoriano Huerta.

## Comprehension and Critical Thinking

### SECTION 1 (pp. 552–557)

- Identify** Who was Queen Liliuokalani?
  - Explain** Why did Liliuokalani's plans for strengthening the monarchy alarm the American business community in Hawaii?
  - Predict** How do you think the Japanese reacted to the Great White Fleet? Do you think the fleet had the effect that President Roosevelt wished?



- SECTION 2** (pp. 546–547)  
**a. Recall** What was the de Lôme letter?  
**b. Summarize** What were the consequences of the Spanish–American War?  
**c. Evaluate** How much influence did the media have in building public support for the Spanish–American War? Explain.

- SECTION 3** (pp. 565–569)  
**a. Describe** What was the Roosevelt Corollary?  
**b. Analyze** In what various ways did the United States exert its power in Latin America?  
**c. Evaluate** How did the acquisition of overseas territory affect the way the United States viewed its role in the world?

- SECTION 4** (pp. 572–575)  
**a. Identify** Who was Pancho Villa?  
**b. Contrast** As government leaders, how did Porfirio Díaz and Francisco Madero differ?  
**c. Elaborate** Why do you think President Wilson wished to avoid war with Mexico?

## Using the Internet

- 14.** On December 31, 1999, the United States returned control of the Panama Canal and the 10-mile-wide Canal Zone to the government of Panama. Using the keyword above, do research to learn about the events that led to this historic handover. Then create a report that analyzes the reasons why the United States gave up the canal and the Canal Zone to Panama.

go.hrw.com

Practice Online

Keyword: SD7 CH17

## Analyzing Primary Sources

**Reading Like a Historian** This painting shows a pineapple plantation in Hawaii, where pineapples were typically harvested by hand.

- 15. Analyzing Visuals**  
 How are the pickers protecting themselves against the tropical heat?

- 16. Making Inferences**  
 Why do you suppose one man is on horseback?



## Critical Reading

Read the passage in Section 1 that begins with the heading “Influence in China.” Then answer the questions that follow.

- 17.** Why did the United States propose the Open Door Policy?
- A** The United States wanted to prevent China from refusing to trade with western nations.
  - B** The United States was protesting Japan’s seizure of Taiwan.
  - C** The United States hoped the Open Door Policy would help resolve the Boxer Rebellion.
  - D** Without a sphere of influence of its own, the United States was afraid of being cut out of the China trade.
- 18.** Which of the following is a true statement about the Boxer Rebellion?
- A** Members of a secret martial arts group in China demanded more respect for their sport.
  - B** Foreign missionaries and Chinese Christians in Beijing came under attack.
  - C** An large international military force stopped the rebellion in 1900 and occupied China for many years afterward.
  - D** The Boxer Rebellion caused western nations to reject the Open Door Policy.

## FOCUS ON WRITING

**Persuasive Writing** Persuasive writing takes a position for or against an issue, using facts and examples as supporting evidence. To practice persuasive writing, complete the assignment below.

**Topic** U.S. imperialism in the late 1800s and early 1900s

- 19. Assignment** Write a paragraph in which you take a position on the overseas activities of the United States in the late 1800s and early 1900s. Was the United States justified in annexing foreign territories and expanding its control over other nations during this period? Support your point of view with reasoning and examples from your reading and studies.