**Western Colonialism: politics**

**Meaning:** Western colonialism, a political-economic phenomenon whereby various European nations explored, conquered, settled, and exploited large areas of the world.

The age of modern colonialism began about 1500, following the European discoveries of a sea route around Africa’s southern coast (1488) and of [America](https://www.britannica.com/place/Americas) (1492). With these events [sea power](https://www.britannica.com/topic/sea-power) shifted from the Mediterranean to the Atlantic and to the emerging nation-states of Portugal, [Spain](https://www.britannica.com/place/Spain), the [Dutch Republic](https://www.britannica.com/place/Dutch-Republic), [France](https://www.britannica.com/place/France), and England. By discovery, conquest, and settlement, these nations expanded and colonized throughout the world, spreading European institutions and [culture](https://www.merriam-webster.com/dictionary/culture).

**European expansion before 1763: Antecedents of European expansion**

[Medieval](https://www.britannica.com/event/Middle-Ages) [Europe](https://www.britannica.com/place/Europe) was largely self-contained until the First [Crusade](https://www.britannica.com/event/Crusades) (1096–99), which opened new political and commercial communications with the Muslim [Near East](https://www.britannica.com/place/Near-East). Although Christian crusading states founded in Palestine and Syria proved [ephemeral](https://www.merriam-webster.com/dictionary/ephemeral), commercial relations continued, and the European end of this trade fell largely into the hands of [Italian](https://www.britannica.com/topic/history-of-Italy) cities.

**Early European**[**trade**](https://www.britannica.com/topic/international-trade)**with**[**Asia**](https://www.britannica.com/place/Asia)

The Oriental land and sea routes terminated at ports in the Crimea, until 1461 at Trebizond (now Trabzon, Turkey), Constantinople (now Istanbul), Asiatic Tripoli (in modern Lebanon), Antioch (in modern Turkey), Beirut (in modern Lebanon), and Alexandria (Egypt), where Italian galleys exchanged European for Eastern products.

Competition between Mediterranean nations for control of Asiatic commerce gradually narrowed to a contest between [Venice](https://www.britannica.com/place/Venice) and Genoa, with the former winning when it severely defeated its rival city in 1380; thereafter, in partnership with Egypt, Venice principally dominated the Oriental trade coming via the [Indian Ocean](https://www.britannica.com/place/Indian-Ocean) and [Red Sea](https://www.britannica.com/place/Red-Sea) to Alexandria.

Overland routes were not wholly closed, but the conquests of the central Asian warrior [Timur](https://www.britannica.com/biography/Timur) (Tamerlane)—whose [empire](https://www.britannica.com/topic/empire-political-science) broke into warring fragments after his death in 1405—and the advantages of a nearly continuous sea voyage from the Middle and Far East to the Mediterranean gave Venice a virtual monopoly of some Oriental products, principally [spices](https://www.britannica.com/topic/spice-trade). The word spices then had a loose application and extended to many Oriental luxuries, but the most valuable European imports were pepper, nutmeg, cloves, and cinnamon.

The Venetians distributed these expensive condiments throughout the Mediterranean region and northern Europe; they were shipped to the latter first by pack trains up the Rhône Valley and, after 1314, by Flanders’ galleys to the [Low Countries](https://www.britannica.com/place/Low-Countries), western Germany, France, and England. The fall of Constantinople to the Ottoman Turks in 1453 did not seriously affect Venetian control. Although other Europeans resented this dominance of the trade, even the Portuguese discovery and exploitation of the Cape of Good Hope route could not altogether break it.

Early Renaissance Europe was short of cash money, though it had substantial banks in northern Italy and southern Germany. [Florence](https://www.britannica.com/place/Florence) possessed aggregations of capital, and its Bardi bank in the 14th century and the Medici successor in the 15th financed much of the eastern Mediterranean trade.

Later, during the great discoveries, the Augsburg houses of Fugger and Welser furnished capital for voyages and New World enterprises.

Gold came from Central Africa by Saharan caravan from Upper Volta (Burkina Faso) near the [Niger](https://www.britannica.com/place/Niger), and interested persons in Portugal knew something of this. When Prince [Henry the Navigator](https://www.britannica.com/biography/Henry-the-Navigator) undertook sponsorship of Portuguese discovery voyages down the west coast of Africa, a principal motive was to find the mouth of a river to be ascended to these mines.

**Technological improvements**

Europe had made some progress in discovery before the main age of exploration. The discoveries of the [Madeira Islands](https://www.britannica.com/place/Madeira-Islands) and the Azores in the 14th century by Genoese seamen could not be followed up immediately, however, because they had been made in galleys built for the Mediterranean and ill suited to ocean travel; the numerous rowers that they required and their lack of substantial holds left only limited room for provisions and cargo. In the early 15th century [all-sails vessels](https://www.britannica.com/technology/sailing-craft), the [caravels](https://www.britannica.com/technology/caravel), largely superseded galleys for Atlantic travel; these were light ships, having usually two but sometimes three masts, ordinarily equipped with lateen sails but occasionally square-rigged. When longer voyages began, the *nao,* or [carrack](https://www.britannica.com/technology/carrack), proved better than the caravel; it had three masts and square rigging and was a rounder, heavier ship, more fitted to cope with ocean winds.

[Navigational instruments](https://www.britannica.com/technology/navigation-technology) were improved. The [compass](https://www.britannica.com/technology/compass-navigational-instrument), probably imported in primitive form from the Orient, was gradually developed until, by the 15th century, European pilots were using an iron pin that pivoted in a round box. They realized that it did not point to the true north, and no one at that time knew of the [magnetic pole](https://www.britannica.com/science/magnetic-pole), but they learned approximately how to correct the readings. The [astrolabe](https://www.britannica.com/science/astrolabe-instrument), used for determining latitude by the altitude of stars, had been known since Roman times, but its employment by seafarers was rare, even as late as 1300; it became more common during the next 50 years, though most pilots probably did not possess it and often did not need it because most voyages took place in the narrow waters of the Mediterranean or Baltic or along western European coasts. For longitude, then and many years thereafter, [dead reckoning](https://www.britannica.com/technology/dead-reckoning-navigation) had to be employed, but this could be reasonably accurate when done by experts.

The typical [medieval](https://www.merriam-webster.com/dictionary/medieval) [map](https://www.britannica.com/science/map) had been the planisphere, or *mappemonde,* which arranged the three known continents in circular form on a disk surface and illustrated a concept more theological than geographical. The earliest surviving specimens of the [portolanic](https://www.britannica.com/technology/portolan-chart), or harbour-finding, charts date from shortly before 1300 and are of Pisan and Genoese origin. Portolanic maps aided voyagers by showing Mediterranean coastlines with remarkable accuracy, but they gave no attention to hinterlands. As Atlantic sailings increased, the coasts of western Europe and Africa south of the [Strait of Gibraltar](https://www.britannica.com/place/Strait-of-Gibraltar) were shown somewhat correctly, though less so than for the Mediterranean.

**The first European empires (16th century)**

**Western colonialism:** [**Portugal’s**](https://www.britannica.com/topic/history-of-Portugal)**seaborne empire**

Following [Christopher Columbus’](https://www.britannica.com/biography/Christopher-Columbus) first voyage, the rulers of Portugal and [Spain](https://www.britannica.com/place/Spain), by the [Treaty of Tordesillas](https://www.britannica.com/event/Treaty-of-Tordesillas) (1494), partitioned the non-Christian world between them by an imaginary line in the Atlantic, 370 leagues (about 1,300 miles) west of the Cape Verde Islands. Portugal could claim and occupy everything to the east of the line and Spain everything to the west (though no one then knew where the demarcation would bisect the other side of the globe). Portuguese rule in [India](https://www.britannica.com/place/India), the [East Indies](https://www.britannica.com/place/East-Indies), and Brazil rested on this treaty, as well as on Portuguese discoveries and on papal sanction (Pope [Leo X](https://www.britannica.com/biography/Leo-X), by a bull of 1514, forbade others to interfere with Portugal’s possessions). Except for such minor incursions as those of [Ferdinand Magellan’s](https://www.britannica.com/biography/Ferdinand-Magellan) surviving ship in 1522 and the Englishman [Sir Francis Drake’s](https://www.britannica.com/biography/Francis-Drake) voyage around the world in 1577–80, the Portuguese operated in the East for nearly a century without European competition. They faced occasional Oriental enemies but weathered these dangers with their superior ships, gunnery, and seamanship.

Territorially, theirs was scarcely an empire; it was a commercial operation based on possession of fortifications and posts strategically situated for trade. This policy was carried out principally by two viceroys, [Francisco de Almeida](https://www.britannica.com/biography/Francisco-de-Almeida) in 1505–09 and [Afonso de Albuquerque](https://www.britannica.com/biography/Afonso-de-Albuquerque) in 1509–15. Almeida seized several eastern African and [Indian](https://www.britannica.com/topic/American-Indian) points and defeated a Muslim naval coalition off Diu (now in Goa, Daman, and Diu union territory, India). Albuquerque endeavoured to gain a monopoly of European [spice trade](https://www.britannica.com/topic/spice-trade) for his country by sealing off all entrances and exits of the [Indian Ocean](https://www.britannica.com/place/Indian-Ocean) competing with the [Portuguese](https://www.britannica.com/topic/history-of-Portugal) route around the Cape of Good Hope. In 1510 he took Goa, in western India, which became the capital and stronghold of the Portuguese East, and in 1511 he captured Malacca at the farther end of the ocean. Later he subdued Hormuz (now in Iran), commanding the [Persian Gulf](https://www.britannica.com/place/Persian-Gulf). They brought soldiers from the home country in limited numbers; but the Portuguese also relied on alliances with native states and enlisted sepoy troops, a policy later followed by the French and English.

Portugal never fully dominated the Indian Ocean because it lacked warships necessary to control the vast water expanse. Albuquerque’s failure to capture Aden at the [Red Sea](https://www.britannica.com/place/Red-Sea) entrance allowed the old traffic through Egypt to Venice to resume following an initial dislocation, and this continued after the Ottoman Turks conquered Egypt in 1517. Much of the Indian Ocean trade was local and, until the Portuguese incursion, had been conducted by Arabs or at least by Muslims. The Portuguese, who at first had intended to oust the Arabs entirely, found it impossible to manage without them. The Hindus, whom they hoped to use for local trade purposes, proved unenterprising and had caste restrictions regarding sea voyages. Muslims were soon trafficking again vigorously, with Portuguese sanction.

Portuguese subjects also pressed beyond the [Strait of Malacca](https://www.britannica.com/place/Strait-of-Malacca) to the East Indies, Siam (now Thailand), and Canton in Ming-dynasty [China](https://www.britannica.com/place/China). Trade with the celestial [empire](https://www.britannica.com/topic/empire-political-science), difficult at first because of China’s exclusionist policies, at length grew, especially after Portugal in 1557 leased Macau, through which for the next 300 years passed much of the Occidental trade with China. Individual Portuguese reached Japan in 1542, followed by traders and Francis Xavier (later made a saint), a renowned Jesuit missionary who laboured with small success to make converts. In the 17th century, the Japanese adopted a rigorous exclusionist policy, although they allowed Portugal’s successors, the Dutch, to conduct a limited trade from the small island of Deshima, near Nagasaki.

Partial domination of the Indian Ocean and much of its valuable trade did not bring Portugal’s crown as much profit as had been anticipated. The intention had been to make Oriental trade a royal monopoly; but Portuguese, from viceroys to humble soldiers and seamen, became private merchants and lined their own pockets to the deprivation of the royal treasury. The Eastern footholds were expensive to maintain, and frequent mishaps to vessels of the Indian fleets, from shipwreck or enemies, reduced gains. The lack of a true monopoly prevented the Portuguese from charging the prices that they wished in European markets. Moreover, Lisbon, while an ideal starting point for voyages around the Cape, proved poorly situated as a distribution centre for spice to northern and central [Europe](https://www.britannica.com/place/Europe). Antwerp, on the Scheldt, was far superior, and for a time Portugal maintained a trading house there; but Portuguese agents found spice sales taken out of their hands by more experienced Italian, German, and Flemish merchants, and the Antwerp establishment was closed in 1549.

It has been asserted that the Portuguese had no [racial prejudice](https://www.britannica.com/topic/racism), but their record proves the opposite. In the 16th and 17th centuries, they could not be expected to be tolerant of Oriental religions, although they soon recognized that wholesale conversion to Catholicism was impossible. Some Africans and Asiatics became Christians and even entered the clergy; but seldom if ever did they rise above the status of parish priests. In other affairs the Portuguese generally treated the dark-skinned peoples as inferiors.

The east coast of Brazil belonged to Portugal by the Tordesillas pact. The government of [Manuel I](https://www.britannica.com/biography/Manuel-I) and his successor, [John III](https://www.britannica.com/biography/John-III-king-of-Portugal) (ruled 1521–57), paid it small attention for 30 years. It proved nearly useless as a way station to the Cape; its Indian population was unruly, and its products, consisting chiefly of *pau-brasil* (Brazilian dyewood), yielded much less revenue than those of India. Threats of French and Spanish intrusion caused John III, in 1530, to send [Martim Afonso de Sousa](https://www.britannica.com/biography/Martim-Afonso-de-Sousa) to make a careful survey of the Brazilian coast and to suggest sites for colonization. Next, the littoral was partitioned into strips called *capitanias,* each colonized and governed under feudal terms by a proprietor, or *donatário.* Some limited settlement followed, and in 1549 the *capitanias* were united under a governor general who established residence at Bahia (now Salvador, Brazil).

In 1580 [Philip II](https://www.britannica.com/biography/Philip-II-king-of-Spain-and-Portugal) of Spain seized the Portuguese throne, which had fallen vacant and to which he had some blood claim. Portugal remained theoretically independent, bound only by a personal union to its neighbour; but succeeding Spanish monarchs steadily [encroached](https://www.merriam-webster.com/dictionary/encroached) on its liberties until the small kingdom became, in effect, a conquered province. Spain’s European enemies meanwhile descended on the Portuguese Empire and ended its Eastern supremacy before the restoration of Portugal’s independence in 1640.

**Spain’s**[**American**](https://www.britannica.com/place/Americas)**empire**

**The conquests**

Only gradually did the Spaniards realize the possibilities of [America](https://www.britannica.com/place/Americas). They had completed the occupation of the larger West [Indian](https://www.britannica.com/topic/American-Indian) islands by 1512, though they largely ignored the smaller ones, to their ultimate regret. Thus far they had found lands nearly empty of treasure, populated by naked natives who died off rapidly on contact with Europeans. In 1508 an expedition did leave Hispaniola to colonize the mainland, and, after hardship and decimation, the remnant settled at Darién on the [Isthmus of Panama](https://www.britannica.com/place/Isthmus-of-Panama), from which in 1513 [Vasco Núñez de Balboa](https://www.britannica.com/biography/Vasco-Nunez-de-Balboa) made his famous march to the Pacific. On the Isthmus the Spaniards heard garbled reports of the wealth and splendour of Inca Peru. Balboa was succeeded (and judicially murdered) by [Pedrarias](https://www.britannica.com/biography/Pedro-Arias-Davila) Dávila, who turned his attention to [Central America](https://www.britannica.com/place/Central-America) and founded Nicaragua.

Expeditions sent by [Diego Velázquez](https://www.britannica.com/biography/Diego-Velazquez-de-Cuellar), governor of Cuba, made contact with the decayed [Mayan](https://www.britannica.com/topic/Maya-people) civilization of Yucatán and brought news of the cities and [precious](https://www.merriam-webster.com/dictionary/precious) metals of [Aztec](https://www.britannica.com/topic/Aztec) Mexico. [Hernán Cortés](https://www.britannica.com/biography/Hernan-Cortes) entered Mexico from Cuba in 1519 and spent two years overthrowing the Aztec confederation, which dominated Mexico’s civilized heartland. The Spaniards used firearms effectively but did most of their fighting with pikes and blades, aided by numerous Indian allies who hated the dominant Aztecs. The conquest of Aztec Mexico led directly to that of Guatemala and about half of Yucatán, whose geography and warlike inhabitants slowed Spanish progress.

Mexico yielded much gold and silver, and the conquerors imagined still greater wealth and wonders to the north. None of this existed, but it seemed real when a northern wanderer, [Alvar Núñez Cabeza de Vaca](https://www.britannica.com/biography/Alvar-Nunez-Cabeza-de-Vaca), in 1536 brought to Mexico an exciting but fanciful report of the fabulous lands. Expeditions explored northern Mexico and the southern part of what is now the United States—notably the expedition of [Juan Rodríguez Cabrillo](https://www.britannica.com/biography/Juan-Rodriguez-Cabrillo) by sea along what are now the California and Oregon coasts and the expeditions of [Hernando de Soto](https://www.britannica.com/biography/Hernando-de-Soto) and Francisco Vázquez Coronado through the southeastern and southwestern U.S. regions. These brought geographical knowledge but nothing of value to the Spaniards, who for years thereafter ignored the northern regions.

Meanwhile, the Pizarro brothers—[Francisco Pizarro](https://www.britannica.com/biography/Francisco-Pizarro) and his half-brothers [Gonzalo](https://www.britannica.com/biography/Gonzalo-Pizarro) and Hernando—entered the [Inca](https://www.britannica.com/topic/Inca) Empire from Panama in 1531 and proceeded with its conquest. Finding the huge realm divided by a recent civil war over the throne, they captured and executed the incumbent usurper, Atahualpa. But the conquest took years to complete; the Pizarros had to crush a [formidable](https://www.merriam-webster.com/dictionary/formidable) native rising and to defeat their [erstwhile](https://www.merriam-webster.com/dictionary/erstwhile) associate, [Diego de Almagro](https://www.britannica.com/biography/Diego-de-Almagro), who felt cheated of his fair share of the spoils. The Pizarros and their followers took and divided a great amount of gold and silver, with prospects of more from the mines of Peru and Bolivia. By-products of the Inca conquest were the seizure of northern Chile by [Pedro de Valdivia](https://www.britannica.com/biography/Pedro-de-Valdivia) and the descent of the entire Amazon by [Francisco de Orellana](https://www.britannica.com/biography/Francisco-de-Orellana). Other conquistadors entered the regions of what became Ecuador, Colombia, and [Argentina](https://www.britannica.com/place/Argentina). (See [Latin America, history of](https://www.britannica.com/place/Latin-America).)

A colonial period of nearly three centuries followed the major Spanish conquests. The [empire](https://www.britannica.com/topic/empire-political-science) was created in a time of rising European absolutism, which flourished in both [Spain](https://www.britannica.com/place/Spain) and Spanish America and reached its height in the 18th century. The overseas colonies became and remained the king’s private estate.

**Spanish colonial policies**

Shortly before the death of Queen Isabella I in 1504, the Spanish [sovereigns](https://www.merriam-webster.com/dictionary/sovereigns) created the House of Trade ([Casa de Contratación](https://www.britannica.com/topic/Casa-de-Contratacion)) to regulate commerce between Spain and the New World. Their purpose was to make the trade monopolistic and thus pour the maximum amount of bullion into the royal treasury. This policy, seemingly successful at first, fell short later because Spain failed to provide necessary manufactured goods for its colonies, foreign competitors appeared, and smuggling grew.

In 1524 Charles V created the [Council of the Indies](https://www.britannica.com/topic/Council-of-the-Indies) (Consejo de Indias) as a lawmaking body for the colonies. During the three centuries of its existence, this council enacted a massive amount of legislation, though much grew obsolete and became a dead letter. The industrious Philip II died in 1598, and his indolent or incompetent successors left American affairs to the Casa and Consejo; both proved generally [conscientious](https://www.merriam-webster.com/dictionary/conscientious) and hard-working bodies, though, for a time in the 17th century, appointments to the legislating council could be purchased.

The viceregal system dated from 1535, when [Antonio de Mendoza](https://www.britannica.com/biography/Antonio-de-Mendoza) was sent to govern New Spain, or Mexico, bypassing the still-vigorous Cortés. A second viceroy was named for Peru in 1542, and the viceroyalties of New Granada and Río de la Plata were formed in 1739 and 1776, respectively. By the 18th century, viceroys served average terms of five years, and under them functioned a [hierarchy](https://www.merriam-webster.com/dictionary/hierarchy) of [bureaucrats](https://www.merriam-webster.com/dictionary/bureaucrats), nearly all sent from Spain to occupy frequently lucrative posts. American-born Spaniards resented this favouritism shown the peninsular Spaniards, and their jealousy accounted in part for their later separation from Spain. Lower socially and economically than either white class were the mestizo offspring of white and Indian matings, and still lower were the Indians and Black slaves.

Though a belief to the contrary exists, Spain sent many colonists to America. One indication of this is the number of new cities founded, distinct from the old Indian [culture](https://www.merriam-webster.com/dictionary/culture) centres. A partial list of such cities, besides the early island ones, includes Vera Cruz, New Spain; Panama, Cartagena, and Guayaquil, in New Granada (in modern Panama, Colombia, and Ecuador, respectively); Lima, Peru; and all those of what are now Chile, Paraguay, Argentina, and Uruguay.

A problem early faced and never truly solved by Spain was that of the [Indians](https://www.britannica.com/topic/American-Indian). The home government was generally [benevolent](https://www.merriam-webster.com/dictionary/benevolent) in legislating for their welfare but could not altogether enforce its humane policies in distant America. The foremost controversy in early decades involved the *[encomienda](https://www.britannica.com/topic/encomienda),* by which Indian groups were entrusted to Spanish proprietors, who in theory cared for them physically and spiritually in return for rights to tribute and labour but who in practice often abused and enslaved them.

Spanish [Dominican](https://www.britannica.com/topic/Dominican-order) friars were the first to condemn the *encomienda* and work for its abolition; the outstanding reformer was a missionary, [Bartolomé de Las Casas](https://www.britannica.com/biography/Bartolome-de-Las-Casas), who devoted most of his long life to the Indian cause. He secured passage of laws in 1542 ordering the early abolition of the *encomienda,* but efforts to enforce these brought noncompliance in New Spain and armed rebellion in Peru. A belief held by some Spanish theologians—that Indians were inferior beings who were destined to be natural slaves, to be subdued and forcibly converted to Christianity—generally prevailed over the opposition of Las Casas and fellow Dominicans. The *encomienda* or its equivalent endured, although this feudal institution declined as royal absolutism grew.

The Indians became real or [nominal](https://www.merriam-webster.com/dictionary/nominal) Christians, but their numbers shrank, less from slaughter and exploitation than from Old World diseases, frequently smallpox, for which they had no inherited immunity. The aboriginal West Indian population virtually disappeared in a few generations, to be replaced by Black slaves. Indian numbers shrank in all mainland areas: at the beginning of Spanish settlement there were perhaps 50,000,000 aborigines; the figure had decreased to an estimated 4,000,000 in the 17th century, after which it slowly rose again. Meanwhile the hybrid mestizo element grew and—to a limited extent—replaced the Indians.

The Leyenda Negra ([Black Legend](https://www.britannica.com/topic/Black-Legend)) [propagated](https://www.merriam-webster.com/dictionary/propagated) by critics of Spanish policy still contributes to the general belief that Spain exceeded other nations in cruelty to subject populations; on the other hand, a review of Spain’s record suggests that it was no worse than other nations and, in fact, produced a greater number of humanitarian reformers. When Dominican zeal declined, the new and powerful [Jesuit](https://www.britannica.com/topic/Jesuits) order became the major Indian protector and led in missionary activity until its expulsion from the Spanish Empire in 1767; the Jesuits took charge of large converted native [communities](https://www.merriam-webster.com/dictionary/communities), notably in the area of the viceroyalty of Río de la Plata that is now Paraguay, in their paternalism often imposing stern [discipline](https://www.merriam-webster.com/dictionary/discipline).

**Effects of the discoveries and empires**

Before the discovery of [America](https://www.britannica.com/place/Americas) and the sea route to [Asia](https://www.britannica.com/place/Asia), the Mediterranean had been the trading and naval centre of [Europe](https://www.britannica.com/place/Europe) and the [Near East](https://www.britannica.com/place/Near-East). Italian seamen were rightly considered to be the best, and they commanded the first royally sponsored transatlantic expeditions—Columbus for [Spain](https://www.britannica.com/place/Spain), [John Cabot](https://www.britannica.com/biography/John-Cabot) for England, and [Giovanni da Verrazano](https://www.britannica.com/biography/Giovanni-da-Verrazzano) for [France](https://www.britannica.com/place/France).

**Europe’s shift to the Atlantic**

Until then the Western countries had lain on the fringe of civilization, with nothing apparently beyond them but Iceland and small islands. With the discovery of the Cape route and America, nations formerly [peripheral](https://www.merriam-webster.com/dictionary/peripheral) found themselves central, with geographical forces impelling them to leadership.

The Mediterranean did not become a backwater, and the Venetian [republic](https://www.britannica.com/topic/republic-government) remained a major commercial power in the 16th century. Venice’s decline came in the 17th, though the Venetians were still [formidable](https://www.merriam-webster.com/dictionary/formidable) against the Turks. As the more powerful Dutch, French, and English replaced the Eastern pioneers of Portugal, however, the burden of competition became more than the venerable republic could bear. The last decisive naval battle fought wholly by Mediterranean seamen was Lepanto (Náupaktos, Greece), where [Don John of Austria](https://www.britannica.com/biography/Juan-de-Austria), in 1571, commanding Spanish and Italian galleys, defeated an Ottoman fleet. Although Atlantic powers thereafter often fought in the Mediterranean, they mainly fought each other, while the Italian cities became pawns in international politics. The nation-state was superseding the small principality and city-state, a trend that had begun before the discoveries. The new nations lay on the Atlantic; and, though Spain and France had Mediterranean frontages, the advantage went to those seaports belonging to substantial countries with ready access to the outer world.

**Changes in Europe**

The opening of old lands in Asia and new ones in America changed Europe forever, and the Iberian countries understandably felt the changes first. The Portuguese government, for a time, made large profits from its Eastern trade, and individuals prospered; but Oriental luxuries were costly compared with the European goods that Portugal offered, and the balance had to be made up in specie. This eastward drain of gold and silver had gone on long before Portuguese imperial times, but it was now intensified. Much of the bullion reaching the Orient did not circulate but was hoarded or made into ornaments; consequently, there was no inflation in Asia, and prices there did not rise enough to create a demand for Western goods, which would have reversed the flow of bullion from the West. The Portuguese obtained most of the [precious](https://www.merriam-webster.com/dictionary/precious) metal for this trade from spice sales through Antwerp and from Africa. The drain proved critical, and, by the reign of [John III](https://www.britannica.com/biography/John-III-king-of-Portugal), the government found itself hard pressed economically and forced to abandon overseas posts that were a financial burden. Later, beginning in the 17th century, Portugal drew its own supply of jewels and gold from Brazil.

Spain’s case was the reverse; although the first American lands discovered yielded little mineral wealth, the mines of Mexico by the 1520s and those of Potosí (in modern Bolivia) by the 1540s were shipping to Spain large quantities of bullion, much of it crown revenue. This did not furnish Charles V and Philip II their largest income; Spanish taxation still exceeded wealth from the New World, yet American silver and gold proved sufficient to cause a price revolution in Spain, where costs, depending on the region, were multiplied by three and five during the 16th century. The Spanish government wished to keep bullion from leaving the kingdom, but high prices in Spain made it a good market for outside products. Spanish industry declined in the 16th century, in part because of the sales taxes imposed by the crown, which necessitated more buying of foreign merchandise. Great quantities of bullion had to be poured out to finance the expensive Spanish European [empire](https://www.britannica.com/topic/empire-political-science) and the costly wars and diplomacy of Charles V and Philip II, both of whom were constantly in debt.

Price rises followed in other countries, largely from the influx of Spanish bullion. In England, where some statistics are available, costs by 1650 had risen by 250 percent over those of 1500.

The European commercial revolution, which brought increased industry, more trade, and larger banks, had begun before the discoveries, but it received stimulus from them. Bullion from America helped create a money economy, replacing the older and largely barter exchange—a trend accentuated by greater European mineral production in the early 16th century. The trade emporiums of Italy and the Baltic Hanseatic League declined and were largely replaced by those of the [Dutch Republic](https://www.britannica.com/place/Dutch-Republic), England, and France. Joint-stock companies made an impressive appearance, notably the East [India](https://www.britannica.com/place/India) Companies of the Dutch Republic, England, and France in the 17th century. The mercantile theory that precious metals [constitute](https://www.merriam-webster.com/dictionary/constitute) the true wealth, though it had attracted advocates for a long time, now came into full vogue and continued to dominate economic thinking.

Discovery introduced Europe to new foods and beverages. Coffee, from Ethiopia, had been consumed in Arabia and Egypt before its wide European use began in the 17th century. Tobacco, an American plant smoked by Indians, won an Old World market despite many individual objectors; the same proved true of chocolate from Mexico and tea from Asia. The South American potato became a staple food in such places as Ireland and central Europe. Cotton, from the Old World, took firm root in the New, from which Europe received an enormously increased supply. Sugar, introduced to the American tropics, along with its molasses and rum derivatives, in time became the principal exports of those regions. Spice was certainly more plentiful than before the discoveries, though the Dutch, when they controlled the [East Indies](https://www.britannica.com/place/East-Indies), were able to limit production and thus to keep the price of cloves and nutmegs high.

The influence of the discoveries permeated literature. Sir [Thomas More’s](https://www.britannica.com/biography/Thomas-More-English-humanist-and-statesman) *Utopia,* printed in 1516 and dealing with an imaginary island, was suggested by [South America](https://www.britannica.com/place/South-America). The Portuguese poet [Luís de Camões](https://www.britannica.com/biography/Luis-de-Camoes) recounted the voyage of [Vasco da Gama](https://www.britannica.com/biography/Vasco-da-Gama), though fancifully, in epic verse. [Michel de Montaigne](https://www.britannica.com/biography/Michel-de-Montaigne) discoursed upon American Indians, some of whom he had seen in France. [Christopher Marlowe’s](https://www.britannica.com/biography/Christopher-Marlowe) drama *Tamburlaine* (1587), though based on the life of the Asiatic conqueror, was an exhortation to his fellow Englishmen to penetrate the New World.

Historiography acquired a broader base by taking the newly discovered lands into account. Astronomy was revolutionized by European penetration of the Southern Hemisphere and discovery of constellations unknown before. Map makers, typified by the Fleming [Gerardus Mercator](https://www.britannica.com/biography/Gerardus-Mercator) and the Dutchman [Abraham Ortelius](https://www.britannica.com/biography/Abraham-Ortelius), portrayed the world in terms that are still recognizable.

**Colonies from northern Europe and mercantilism (17th century)**

The northern Atlantic powers, for understandable reasons, acquired no permanent overseas possessions before 1600. The [United Provinces of the Netherlands](https://www.britannica.com/place/Dutch-Republic) spent the final decades of the 16th century winning independence from Spain; [France](https://www.britannica.com/place/France) had constant European involvements and wars of religion; England, matrimonially allied with [Spain](https://www.britannica.com/place/Spain) as late as 1558, was undergoing its Protestant Reformation and long was unwilling to challenge predominant Spain openly in any manner.

**The Dutch**

Although England’s defeat of Philip II’s Armada in 1588 helped to lessen Spanish [sea power](https://www.britannica.com/topic/sea-power), it was the Dutch who early in the next century really broke that power and became the world’s foremost naval and commercial nation, with science and skills [commensurate](https://www.merriam-webster.com/dictionary/commensurate) with their prowess. Only late in the 17th century did they decline, because of Holland’s limited size and the inferiority of its geographical position to England’s. The Dutch, meanwhile, penetrated all the known oceans, including the Arctic, and waged unrelenting war against the Iberian kingdoms.

The Dutch coveted the Portuguese commercial [empire](https://www.britannica.com/topic/empire-political-science) more than the Spanish continental one. They took much of the Portuguese East and invaded Brazil (1624–54), the richer half of which they controlled for a time. They also penetrated Portuguese Angola, which they desired because the slaves it exported were beginning to work the Brazilian plantations. They ultimately failed in the South Atlantic, though they gained Dutch Guiana (now Suriname), Curaçao, and what later became [British Guiana](https://www.britannica.com/place/Guyana) (Guyana). Meanwhile, [Willem Schouten](https://www.britannica.com/biography/Willem-Schouten), one of their free-lance voyagers, had made the discovery of [Cape Horn](https://www.britannica.com/place/Cape-Horn) in 1616.

**Eastern pursuits**

The Dutch States-General, in 1602, chartered the [United East India Company](https://www.britannica.com/topic/Dutch-East-India-Company) (Vereenigde Oost-Indische Compagnie, popularly called the Dutch East [India](https://www.britannica.com/place/India) Company), a joint-stock enterprise with [investment](https://www.britannica.com/topic/investment) open to all. In control was a board of 17 directors, the so-called Heeren XVII, who received a monopoly of navigational rights eastward around the Cape of Good Hope and westward through the [Strait of Magellan](https://www.britannica.com/place/Strait-of-Magellan). They could make treaties with native princes on behalf of the States-General (from which they were scarcely separable), establish garrisoned forts, and appoint governors and [justices](https://www.merriam-webster.com/dictionary/justices). The company had no interest in extending Protestantism, and there was no mention of religious conversion, though Calvinist ministers later gained converts in the East, mostly in [communities](https://www.merriam-webster.com/dictionary/communities) previously made Catholic by Portuguese Jesuits.

The company established headquarters first at Bantam in Java in 1607, later moving them to Jacatra, renamed Batavia (now [Jakarta](https://www.britannica.com/place/Jakarta)), in the same island. Its two main objectives were the ouster of European competitors—Portuguese, English, and Spanish—and dominance of local trade, previously in native hands. Portuguese vigour had somewhat declined, and the Dutch were victorious in most armed encounters. They also squeezed out the English, whose own [East India Company](https://www.britannica.com/topic/East-India-Company) thereafter concentrated efforts in the Indian peninsula.

The principal builder of the Dutch Oriental empire was [Jan Pieterszoon Coen](https://www.britannica.com/biography/Jan-Pieterszoon-Coen), company governor general from 1618 to 1623 and again from 1627 until his death in 1629. Financially, local trade monopoly was even more important than the expulsion of white competitors. The extension of Dutch control to islands beyond Java had started before the governorship of Coen, who accentuated the process. He and other company officials behaved ruthlessly; for example, when the inhabitants of the nutmeg-growing island of Great Banda (modern Pulau Banda Besar in Indonesia) resisted the Dutch in 1621, Coen had 2,500 of the inhabitants massacred and 800 more transported to Batavia. Company policy was to restrict [clove](https://www.merriam-webster.com/dictionary/clove) production to Amboina and a few neighbouring islands firmly under Dutch control. To insure this, about 65,000 clove trees were destroyed in the [Moluccas](https://www.britannica.com/place/Moluccas), and Dutch subjection of Macassar made the monopoly virtually complete. In 1656 the famous Moluccas were described as a wilderness. Besides being a conqueror, Coen was an able businessman and an economist. When he died he was engaged in gaining a monopoly of the pepper of interior Sumatra, which was later sealed off securely by the fall of Portuguese Malacca in 1641.

Batavia became the focal point of the Dutch East, and through it passed the commerce of [China](https://www.britannica.com/place/China), Japan, India, Ceylon, and Persia, bound for [Europe](https://www.britannica.com/place/Europe) or other Oriental ports. The Dutch never monopolized the China trade because the Portuguese held Macau, the Spaniards held Manila, and the Japanese, for a time, engaged in this commerce. The Dutch gained a foothold in Formosa in 1624 but lost it to a Chinese pirate in 1662. After Japan became exclusionist in 1641, a trickle of Dutch trade continued to enter it through the small island of Deshima (now part of Nagasaki, Japan), even after the dissolution of the United East India Company in 1799.

The economy of Java changed somewhat after the importation of the coffee plant in 1696. Coffee, often simply called java, rapidly became a major island crop and was exported from there to Dutch [America](https://www.britannica.com/place/Americas). The company had earlier brought coffee to Ceylon (now Sri Lanka), but that experiment had failed when a [blight](https://www.merriam-webster.com/dictionary/blight) attacked its leaves. The company ousted the Portuguese from Ceylon and dominated the island until it was itself dispossessed by the British in 1796. Under its jurisdiction, as earlier, the major Ceylonese export was cinnamon, though the Dutch also dealt in jewels and pepper and carried on a trade in elephants.

In their constant search for commercial outlets, the company’s officials sponsored new exploration. Coen’s ablest successor, Antonio van Diemen, governor general in 1636–45, sent [Abel Tasman](https://www.britannica.com/biography/Abel-Tasman) to investigate the great land (Australia) previously sighted by Spanish, Portuguese, and Dutch seamen. Tasman sailed around the continent and discovered Van Diemen’s Land (Tasmania), Staatenland (New Zealand), and the Tonga and Fiji Islands, but their commercial possibilities seemed insufficient to warrant further attention.

Dutch penetration of the East was not colonization; small farmers and artisans neither could nor would compete with the abundant, cheap native labour. Those Dutchmen going eastward were company officials, seamen and soldiers, overseers of plantations and commerce, and a few scientists and Calvinist clergymen; there was no place for others.

The Dutch moved into uninhabited Mauritius, which they later abandoned and saw pass first to France and finally to Great Britain. The Heeren XVII felt the need of a station on the [arduous](https://www.merriam-webster.com/dictionary/arduous) voyage between the home country and the East. They obtained it at [Cape Town](https://www.britannica.com/place/Cape-Town) (founded in 1652 by Jan van Riebeeck), which company ships thereafter regularly visited for fresh meat and vegetables to reduce scurvy. The town did not altogether live up to first expectations because the harbour was exposed, but the hinterland possessed a good climate and no dangerous natives. Beginning in the 1680s the company encouraged a moderate influx by Dutch families and French Huguenot exiles. Although the British conquered the colony in 1806, the descendants of these early settlers remained the largest white element and spoke a variant of Dutch, which became Afrikaans.

**Western pursuits**

Dutch activity in the South Atlantic, Guyana, the [West Indies](https://www.britannica.com/place/West-Indies-island-group-Atlantic-Ocean), and New Netherland (New York) was the work of the [West India Company](https://www.britannica.com/topic/Dutch-West-India-Company) (West-Indische Compagnie), founded in 1621. This never proved as successful as the Heeren XVII’s generally profitable enterprise, but it did produce results. Except for the Cape, the only real Dutch colonization undertaking was New Netherland in [North America](https://www.britannica.com/place/North-America), started in 1624 by the West India Company. Ft. Amsterdam, or New Amsterdam, was founded, and two years later the company agent [Peter Minuit](https://www.britannica.com/biography/Peter-Minuit) made a 60-guilder ($24) transaction with the local Indians for the purchase of Manhattan island. Dutch settlement along the Hudson from New Amsterdam to Ft. Orange (Albany) remained sparse; the company’s insistence on monopolizing the [Indian](https://www.britannica.com/topic/American-Indian) fur trade discouraged Dutchmen from migrating there. Further, the policy of creating large patroon land grants, five in all, along the river under feudal proprietors, limited settlement. New Amsterdam itself became fairly thriving because it possessed the best harbour in North America. Many besides Dutchmen settled there; some came from nearby [New England](https://www.britannica.com/place/New-England), and there was a sprinkling of French, Scandinavian, Irish, German, and Jewish inhabitants. The city was weakly defended and fell rather easily to an English fleet in 1664; it was renamed New York. Although the Dutch retook it briefly in 1673–74, the colony became permanently English by the Treaty of Westminster in 1674. The West India Company was then dissolved, to be reconstituted for exploitation of the Caribbean holdings but to attempt no further territorial expansion.

**The French**

France probably could have become the leading European colonial power in the 17th and 18th centuries. It had the largest population and wealth, the best army while [Louis XIV](https://www.britannica.com/biography/Louis-XIV-king-of-France) ruled, and, for a time in his reign, the strongest navy. But France pursued a spasmodic overseas policy because of an intense preoccupation with European affairs; England, France’s ultimately successful rival, was freer of such entanglements.

**Early settlements in the New World**

Verrazano reconnoitered the North American coast for France in 1524, and in the next decade [Jacques Cartier](https://www.britannica.com/biography/Jacques-Cartier) explored the St. Lawrence River; his plans to establish a colony, however, came to nothing. During most of the rest of the 16th century, French colonization efforts were confined to short-lived settlements at [Guanabara Bay](https://www.britannica.com/place/Guanabara-Bay) (Rio de Janeiro) and Florida; both met sad ends. France meanwhile was troubled by internal religious strife and, for a time, was influenced by Philip II of [Spain](https://www.britannica.com/place/Spain). But at the beginning of the 17th century, with Spanish power declining and domestic religious peace restored by King Henry IV’s [Edict of Nantes](https://www.britannica.com/event/Edict-of-Nantes) (1598), granting religious liberty to the Huguenots, the King chartered a Compagnie d’Occident (Western Company). This led to further exploration and to a small Acadian (Nova Scotian) settlement, and in 1603 [Samuel de Champlain](https://www.britannica.com/biography/Samuel-de-Champlain) went to [Canada](https://www.britannica.com/place/Canada), called New France. Champlain became Canada’s outstanding leader, founding Quebec in 1608, defeating the Iroquois of New York, stimulating fur trade, and exploring westward to [Lake Huron](https://www.britannica.com/place/Lake-Huron) in 1615. He introduced Recollet (Franciscan) friars for conversion of the American Indians, but the Jesuit order (the Society of Jesus) soon became the principal missionary body in Canada.

Under the ministership of Cardinal Richelieu (served 1624–42), a Council of Marine was created, with responsibility for colonial affairs. French West [Indian](https://www.britannica.com/topic/American-Indian) settlement, following the activities of pirates and filibusters, began in 1625 with the admission of French settlers to St. Christopher (already settled by the British in 1623 and partitioned between the two countries until its cession to the British in 1713), and by 1664 France held 14 Antillean islands containing 7,000 whites, the principal possessions being Guadeloupe and Martinique. Saint-Domingue (Haiti), not yet annexed, contained numbers of Frenchmen, mostly buccaneers from Tortuga. Sugar became the main crop of the islands; the date when importation of Black slaves began is uncertain, though some were sold at Guadeloupe as early as 1642.

French West Indian society was caste bound, with officials and large planters (*gros blancs*) at the top, followed, in descending order, by merchants, buccaneers, and small farmers (*petits blancs*). Lowest of all were contract labourers from France (*engagés*) and Black slaves.

[French Guiana](https://www.britannica.com/place/French-Guiana) was built around the Cayenne settlement, founded about 1637. There were other Frenchmen along the neighbouring coast at first, but, threatened by Dutchmen and natives, they finally took refuge at Cayenne. The Cayenne settlers, lacking any basis of prosperity, existed partly by raiding the Amazon Indians. The 18th century brought some improvement, but as late as 1743 French Guiana had only 600 whites, living by coffee and cacao [culture](https://www.merriam-webster.com/dictionary/culture) and without means to import any but the crudest necessities.

**Activities in India**

[Jean-Baptiste Colbert](https://www.britannica.com/biography/Jean-Baptiste-Colbert) held a succession of high offices in France, including the ministry of marine, during the early reign of Louis XIV. Colbert was an archmercantilist and believed that an abundance of [precious](https://www.merriam-webster.com/dictionary/precious) metals would enrich France. This required a favourable [balance of trade](https://www.britannica.com/topic/balance-of-trade) and protective tariffs. Most of his policy applied to France itself, but he meant to supplement it with colonial markets protected by a strong navy. Colbert felt concern over the quantities of cash that Frenchmen paid the Dutch for Eastern products and intended for his countrymen to have a share of those profits. In 1664 he placed hopes in a new French Company of the [East Indies](https://www.britannica.com/place/East-Indies) (Compagnie Française des Indes Orientales), to which he personally subscribed and which bought out small predecessors. The company tried unsuccessfully to make Madagascar a great centre of trade, and the huge island became a stronghold of piracy, though the French acquired nearby Mauritius.

In the Indian peninsula, where the [English East India Company](https://www.britannica.com/topic/East-India-Company) had holdings, French progress was slow in Colbert’s time and after, partly because the last great Mughal emperor, Aurangzeb, reigned and dominated [India](https://www.britannica.com/place/India). The company did acquire Pondichéry and several other posts, however, and an [affiliate](https://www.merriam-webster.com/dictionary/affiliate) opened a limited trade with [China](https://www.britannica.com/place/China). When Aurangzeb died in 1707, his [empire](https://www.britannica.com/topic/empire-political-science) declined rapidly. Thereafter, the question of future control of India lay chiefly between the French company (reorganized and renamed the [Compagnie Française des Indes](https://www.britannica.com/topic/French-East-India-Company) in 1720) and the English company; both companies backed or opposed warring native rulers and exacted payment from them for financial support and for arming and drilling the native sepoy troops in the European manner. By the 1740s the French had gained the upper hand, and in the [War of the Austrian Succession](https://www.britannica.com/event/War-of-the-Austrian-Succession) (1740–48; called [King George’s War](https://www.britannica.com/event/King-Georges-War) in North America), the French governor general of India, [Joseph-François Dupleix](https://www.britannica.com/biography/Joseph-Francois-Dupleix), captured Madras, the centre of British power. But in the ensuing [Treaty of Aix-la-Chapelle](https://www.britannica.com/event/Treaty-of-Aix-la-Chapelle) the British, who had made gains in [North America](https://www.britannica.com/place/North-America), recovered Madras. Never again did the French come so near success, and their fortunes soon declined. Their company had not made large profits because expensive wars and the costs of subsidizing native princes had consumed revenue. The home government seldom cooperated, and French investors on the whole declined to speculate in overseas ventures.

**Colonization of**[**New France**](https://www.britannica.com/place/New-France)

New France became a royal province in 1663, with both good and bad results. The arrival of troops in 1665 lessened the danger from the hostile Iroquois. Jean Talon, the powerful intendant sent by Colbert in the same year, strove to make Canada a self-sustaining economic structure, but his plan was finally thwarted by his home government’s failure to supply financial means chiefly because of the King’s extravagance and costly European wars.

Colbert gave some stimulus to colonization of New France. Grants of land, called *seigneuries,* with frontages on the St. Lawrence, were apportioned to proprietors, who then allotted holdings to small farmers, or habitants. More land came under cultivation, and the white population grew, though immigration from France declined sharply after 1681 because the home authorities were reluctant to spare manpower for empty Canada. After 1700 most French Canadians were North American born, a factor that weakened loyalty to the mother country.

North American exploration proceeded rapidly in Colbert’s time. Fur traders had earlier reached Lake Superior; [Louis Jolliet](https://www.britannica.com/biography/Louis-Jolliet) and [Jacques Marquette](https://www.britannica.com/biography/Jacques-Marquette) now travelled the Fox and Wisconsin rivers to the Mississippi in 1673 and descended it to the Arkansas. Robert Cavelier, sieur de La Salle, followed the Mississippi to the [Gulf of Mexico](https://www.britannica.com/place/Gulf-of-Mexico) in 1682 and claimed the entire [Mississippi River](https://www.britannica.com/place/Mississippi-River) Basin, or Louisiana, for France; a later consequence was the founding of [New Orleans](https://www.britannica.com/place/New-Orleans-Louisiana) (Nouvelle-Orléans) in 1718 by [Jean-Baptiste Lemoyne](https://www.britannica.com/biography/Jean-Baptiste-Lemoyne), sieur de Bienville, the governor of Louisiana. French traders ultimately reached Santa Fe in Spanish [New Mexico](https://www.britannica.com/place/New-Mexico), and the sons of explorer Pierre Gaultier de Varennes, sieur de la Vérendrye—Louis-Joseph and François—visited the [Black Hills](https://www.britannica.com/place/Black-Hills) of [South Dakota](https://www.britannica.com/place/South-Dakota) and may have seen the [Rocky Mountains](https://www.britannica.com/place/Rocky-Mountains).

The [Roman Catholic Church](https://www.britannica.com/topic/Roman-Catholicism) became firmly rooted in Canada, without the [intellectual](https://www.merriam-webster.com/dictionary/intellectual) opposition and anticlericalism that developed in 18th-century France. Jesuit mission work among the Indians, extending to the [Middle West](https://www.britannica.com/place/Midwest), saw more devotion and bravery by the priests than substantial results. Christianity made small appeal to most Indians, who could accept a supreme being but rejected the Christian [ethic](https://www.merriam-webster.com/dictionary/ethic). Several [zealous](https://www.merriam-webster.com/dictionary/zealous) Jesuits became [martyrs](https://www.merriam-webster.com/dictionary/martyrs) to the faith; genuine conversions were few and backslidings frequent.

In the 18th century, with the pioneering period over, life in New France became easygoing and even pleasant, despite governmental absolutism. But the fur trade in the west drew vigorous young men from the seigneurial estates to become *coureurs de bois* (fur traders), and their loss crippled agriculture. Civil and religious authorities tried to hold settlers to farming because furs paid neither tithes nor seigneurial dues. This drainage of manpower partly explains the slow growth of New France, which, by a census of 1754, had only 55,000 whites.

**The English**

There is evidence that Bristol seamen reached Newfoundland before 1497, but [John Cabot’s](https://www.britannica.com/biography/John-Cabot) Atlantic crossing in that year is the first recorded English exploration. After the death of Henry VII in 1509, England lost interest in discovery and did not resume it until 1553 and the formation of the [Muscovy Company](https://www.britannica.com/topic/Muscovy-Company), which tried to find a [Northeast Passage](https://www.britannica.com/topic/Northeast-Passage) to [Asia](https://www.britannica.com/place/Asia), discovered the island of [Novaya Zemlya](https://www.britannica.com/place/Novaya-Zemlya), and opened a small trade with Russia. The English also searched for a Northwest Passage, and Martin Frobisher sailed to Greenland, [Baffin Island](https://www.britannica.com/place/Baffin-Island), and the [adjacent](https://www.merriam-webster.com/dictionary/adjacent) mainland.

**English ascendancy in India**

Francis Drake and others raided the [Spanish Main](https://www.britannica.com/place/Spanish-Main), and Drake and [Thomas Cavendish](https://www.britannica.com/biography/Thomas-Cavendish) sailed around the world. The defeat of Philip II’s Armada in 1588, though less disastrous to [Spain’s](https://www.britannica.com/place/Spain) seapower than commonly assumed, contributed to opening the way for [English](https://www.britannica.com/place/England) colonization of [America](https://www.britannica.com/place/Americas). Interest in the Orient at first proved greater, however, and, in 1600, London merchants formed an [East India Company](https://www.britannica.com/topic/East-India-Company). It could not compete with the rival Dutch company in the region of largest profits—the East Indies—so it transferred its emphasis to the [Indian](https://www.britannica.com/topic/American-Indian) subcontinent. The English acquired Masulipatam in 1611 and Madras in 1639, having meanwhile destroyed Portuguese Hormuz in 1622. Charles II obtained Bombay in 1661, as part of his Portuguese queen’s marriage dowry, and awarded it to the company.

Collapse of the [Mughal Empire](https://www.britannica.com/topic/Mughal-dynasty) after 1707 led ultimately to armed conflict between the [British](https://www.britannica.com/place/British-Empire) and French companies for increased trade and influence. Dupleix had won the upper hand for [France](https://www.britannica.com/place/France) by 1748; but in the ensuing [Seven Years’ War](https://www.britannica.com/event/Seven-Years-War) (1756–63), fought between the major European powers in various parts of the world, the British company gained ascendancy in India, thanks largely to the ability of [Robert Clive](https://www.britannica.com/biography/Robert-Clive), and held it thereafter. Pondichéry surrendered; and, though France recovered this post by the ensuing Treaty of Paris (1763), French power in India had shrunk almost to nothing, while the British company’s was now rivalled only by that of the native [Marāthā confederacy](https://www.britannica.com/topic/Maratha-confederacy).

Company profits from India came first from the familiar spices, but after 1660, Indian textiles outstripped these in importance. Cheap cloths, mainly cottons, found a mass market among the English poorer classes, though dainty fabrics for the wealthy also paid well. Imports of calicoes (inexpensive cotton fabrics from Calicut) to England grew so large that in 1721 Parliament passed the Calico Act to protect English manufacturers, forbidding the use of calico in England for apparel or for domestic purposes (repeal of the act in 1774 coincided with inventions of mechanical devices that made possible English cloth production in successful competition with Eastern fabrics).

**England’s American colonies**

The English [West Indies](https://www.britannica.com/place/West-Indies-island-group-Atlantic-Ocean) for many years exceeded [North America](https://www.britannica.com/place/North-America) in economic importance. The [Lesser Antilles](https://www.britannica.com/place/Lesser-Antilles), earlier passed over by Spain in favour of the larger islands, lay open to any colonizer, though their ferocious Carib inhabitants sometimes gave trouble. The Leeward Islands of Antigua, St. Kitts, Nevis, and Barbados, as well as the Bermudas, were settled by Englishmen between 1609 and 1632. Barbados, at first the most important, owed its prosperity to the introduction of sugar [culture](https://www.merriam-webster.com/dictionary/culture) about 1637. The size of landholdings increased in all the islands, and the white populations accordingly diminished as slavery came to furnish most of the raw labour. When an expedition sent by [Oliver Cromwell](https://www.britannica.com/biography/Oliver-Cromwell) took Spanish Jamaica in 1655, that island became the English West Indian centre. Settlement of Belize (later British Honduras) by buccaneers and log cutters began in 1636, although more than a century elapsed before Spain acknowledged that the English indeed had the right to be there.

The English islanders, to the envy of their Dutch and French neighbours, enjoyed such [constitutional](https://www.merriam-webster.com/dictionary/constitutional) privileges as the right to elect semipopular assemblies. Barbados once hoped to have two representatives in Parliament, and some Barbadians, during the English (Glorious) Revolution (1688–89), thought of making their island an independent state, but nothing came of this.

The original English mainland colonies—Virginia (founded 1607), Plymouth (1620), and [Massachusetts Bay](https://www.britannica.com/place/Massachusetts-Bay) (1630)—were founded by joint-stock companies. The later [New England](https://www.britannica.com/place/New-England) settlements—New Hampshire, New Haven, Connecticut, and Rhode Island—began as offshoots of Massachusetts, which acquired jurisdiction over the Maine territory. The New England colonies were first peopled partly by religious dissenters, but except for the separatist Plymouth Pilgrims they did not formally secede from the [Church of England](https://www.britannica.com/topic/Church-of-England) for the time being.

[Proprietary](https://www.merriam-webster.com/dictionary/Proprietary) colonies, under individual [entrepreneurs](https://www.merriam-webster.com/dictionary/entrepreneurs), began with Maryland, founded in 1634 under the Catholic direction of Cecilius and [Leonard Calvert](https://www.britannica.com/biography/Leonard-Calvert). Also proprietary was Pennsylvania, which originally included Delaware, founded by the Quaker William Penn in 1682. Maryland and Pennsylvania, except for a brief royal interlude in Maryland, continued under Calvert and Penn heirs until the American Revolution; all other colonies except Connecticut and Rhode Island ultimately had royal governments. The Carolinas, after abortive attempts at colonization, were effectively founded in 1670 and became first proprietary and, later, royal colonies. Georgia, last of the 13, began in 1732, partly as a philanthropic enterprise headed by James Oglethorpe to furnish a rehabilitation home for debtors and other underprivileged Englishmen. All the mainland colonies eventually had representative assemblies, chosen by the propertied classes, to aid and often handicap their English governors.

The original settlers, predominantly English, were later supplemented by French Huguenots, Germans, and Scots-Irish, especially in western New York, Pennsylvania, and the southern colonies. New York, acquired from the [United Provinces of the Netherlands](https://www.britannica.com/place/Dutch-Republic) and including [New Jersey](https://www.britannica.com/place/New-Jersey), continued to have some Dutch flavour long after the Dutch had become a small minority. By the [French and Indian War](https://www.britannica.com/event/French-and-Indian-War) (1754–63, the American portion of the Seven Years’ War), the total population of the mainland colonies was estimated as 1,296,000 whites and 300,000 Blacks, enormously in excess of the 55,000 whites inhabiting [French Canada](https://www.britannica.com/place/Quebec-province).

The only bond of union among the British colonies was their [allegiance](https://www.merriam-webster.com/dictionary/allegiance) to the king, and in the wars with France (*c.* 1689–1763) it proved hard to unite them against the common enemy. All the colonies were agricultural, with New England being a region of small farms, the Middle Atlantic colonies having a larger scaled and more diversified farming, and the southern ones tending to plantations on which tobacco, rice, and indigo were raised by slaves (although slavery was legal throughout all the colonies). There was much colonial shipping, especially from New England, whose merchants and seamen traded with England, Africa, and the West Indies; Massachusetts shipbuilders had built more than 700 ships by 1675. By 1763 several towns had grown into cities, including Boston, [New York City](https://www.britannica.com/place/New-York-City), Philadelphia, Baltimore, and Charleston, [South Carolina](https://www.britannica.com/place/South-Carolina).

[**Mercantilism**](https://www.britannica.com/topic/mercantilism)

By the time the term mercantile system was coined in 1776 by the Scottish philosopher Adam Smith, European states had been trying for two centuries to put mercantile theory into practice. The basis of mercantilism was the notion that national wealth is measured by the amount of gold and silver a nation possesses. This seemed proven by the fact that [Spain’s](https://www.britannica.com/place/Spain) most powerful years had occurred when it was first reaping a bullion harvest from its overseas possessions.

The mercantile theory held that colonies exist for the economic benefit of the mother country and are useless unless they help to achieve profit. The mother nation should draw raw materials from its possessions and sell them finished goods, with the balance favouring the European country. This trade should be monopolistic, with foreign intruders barred.

**The Spanish**[**fleet system**](https://www.britannica.com/topic/Spanish-treasure-fleet)

Spain acted upon the as-yet-undefined mercantile theory when, in 1565, it perfected the fleet (*flota*) system, by which all legal trade with its [American colonies](https://www.britannica.com/topic/American-colonies) was restricted to two annual fleets between Seville and designated ports on the [Gulf of Mexico](https://www.britannica.com/place/Gulf-of-Mexico) and Caribbean. The outgoing ships bore manufactured articles; returning, their cargoes consisted partly of gold and silver bars. Though the system continued for nearly two centuries, Spain was a poor country by 1700.

**French mercantilist activities**

Ignoring this lesson, other European states adopted the mercantilist policy; the [France](https://www.britannica.com/place/France) of [Louis XIV](https://www.britannica.com/biography/Louis-XIV-king-of-France) and Colbert is the outstanding example. Colbert, who dominated French policy for 20 years, strictly regulated the economy. He instituted protective tariffs and sponsored a monopolistic [merchant marine](https://www.britannica.com/topic/merchant-marine). He regarded what few overseas possessions France then had as ultimate sources of liquid wealth, which they were poorly situated to furnish because they lacked such supplies of bullion as Spain controlled in Mexico and Peru.

**The English**[**navigation acts**](https://www.britannica.com/event/Navigation-Acts)

England adhered to mercantilism for two centuries and, possessing a more lucrative [empire](https://www.britannica.com/topic/empire-political-science) than France, strove to [implement](https://www.merriam-webster.com/dictionary/implement) the policy by a series of navigation acts. The first, passed by [Oliver Cromwell’s](https://www.britannica.com/biography/Oliver-Cromwell) government in 1651, attempted chiefly to exclude the Dutch from England’s carrying trade: goods imported from Africa, [Asia](https://www.britannica.com/place/Asia), or [America](https://www.britannica.com/place/Americas) could be brought only in English ships, which included colonial vessels, thus giving the English North American merchant marine a substantial stimulus. After the royal Restoration in 1660, Parliament renewed and strengthened the Cromwellian measures. By then colonial American maritime competition with England had grown so severe that laws of 1663 required colonial ships carrying European goods to America to route them through English ports, where a [duty](https://www.britannica.com/topic/tariff) had to be paid, but from lack of enforcement these soon became inoperative. In the early 18th century the English lost some of their enthusiasm for bullion alone and placed chief emphasis on commerce and industry. The [Molasses Act](https://www.britannica.com/event/Molasses-Act) of 1733 was in the interest of the British West [Indian](https://www.britannica.com/topic/American-Indian) sugar growers, who complained of the amount of French island molasses imported by the mainland colonies; the French planters had been buying fish, livestock, and lumber brought by North American ships and gladly exchanging their sugar products for them at low prices. Prohibition of colonial purchases of French molasses, though decreed, went largely unenforced, and [New England](https://www.britannica.com/place/New-England), home of most of the carrying trade, continued prosperous.

**The old colonial system and the competition for empire (18th century)**

Faith in mercantilism waned during the 18th century, first because of the influence of French [Physiocrats](https://www.britannica.com/topic/physiocrat), who advocated the rule of nature, whereby trade and industry would be left to follow a natural course. [François Quesnay](https://www.britannica.com/biography/Francois-Quesnay), a physician at the court of [Louis XV](https://www.britannica.com/biography/Louis-XV) of France, led this school of thought, fundamentally advocating an agricultural economy and holding that productive land was the only genuine wealth, with trade and industry existing for the transfer of agricultural products.

[Adam Smith](https://www.britannica.com/biography/Adam-Smith) adopted some physiocratic ideas, but he considered labour very important and did not altogether accept land as the sole wealth. Smith’s [*Inquiry Into the Nature and Causes of the Wealth of Nations*](https://www.britannica.com/topic/An-Inquiry-into-the-Nature-and-Causes-of-the-Wealth-of-Nations) (1776), appearing just as [Britain](https://www.britannica.com/place/Great-Britain-island-Europe) was about to lose much of its older empire, established the basis of new economic thought—classical economics. This [denigrated](https://www.merriam-webster.com/dictionary/denigrated) mercantilism and advocated free, or at least freer, trade and state noninterference with private enterprise. *Laisser-faire et laisser-aller* (“to let it alone and let it flow”) became the slogan of this British economic school. Smith thought that [regulation](https://www.britannica.com/topic/regulation) only reduced wealth, a view in part adopted by the British government 56 years after his death.

[**Slave trade**](https://www.britannica.com/topic/slave-trade)

Slavery, though abundantly practiced in Africa itself and widespread in the ancient Mediterranean world, had nearly died out in [medieval](https://www.merriam-webster.com/dictionary/medieval) [Europe](https://www.britannica.com/place/Europe). It was revived by the Portuguese in Prince Henry’s time, beginning with the enslavement of Berbers in 1442. Portugal populated [Cape Verde](https://www.britannica.com/place/Cabo-Verde), [Fernando Po](https://www.britannica.com/place/Bioko) (now Bioko), and [São Tomé](https://www.britannica.com/place/Sao-Tome) largely with Black slaves and took many to the home country, especially to the regions south of the [Tagus River](https://www.britannica.com/place/Tagus-River).

New World Black slavery began in 1502, when Gov. [Nicolás de Ovando](https://www.britannica.com/biography/Nicolas-de-Ovando) of Hispaniola imported a few evidently Spanish-born Blacks from [Spain](https://www.britannica.com/place/Spain). Rapid decimation of the [Indian](https://www.britannica.com/topic/American-Indian) population of the Spanish [West Indies](https://www.britannica.com/place/West-Indies-island-group-Atlantic-Ocean) created a labour shortage, ultimately remedied from Africa. The great reformer, Las Casas, advocated importation of Blacks to replace the vanishing Indians, and he lived to regret having done so. The population of the [Greater Antilles](https://www.britannica.com/place/Greater-Antilles) became largely Black and mulatto; on the mainland, at least in the more populated parts, the Indians, supplemented by a growing mestizo caste that clung more tenaciously to life and seemed more suited to labour, kept African slavery somewhat confined to limited areas.

The Portuguese at first practiced Indian slavery in Brazil and continued to employ it partially until 1755. It was gradually replaced by the African variety, beginning prominently in the 17th century and coinciding with the rapid rise of Brazilian sugar [culture](https://www.merriam-webster.com/dictionary/culture).

As the English, French, Dutch, and, to a lesser extent, the Danes colonized the smaller West Indian islands, these became plantation settlements, largely [cultivated](https://www.merriam-webster.com/dictionary/cultivated) by Blacks. Before the latter arrived in great numbers, the bulk of manual labour, especially in the English islands, was performed by poor whites. Some were indentured, or contract, servants; some were redemptioners who agreed to pay ship captains their passage fees within a stated time or be sold to bidders; others were convicts. Some were kidnapped, with the tacit approval of the English authorities, in keeping with the mercantilist policy that advocated getting rid of the unemployed and vagrants. Black slavery eventually surpassed white servitude in the West Indies.

John Hawkins commanded the first English slave-trading expedition in 1562 and sold his cargo in the Spanish Indies. English slaving, nevertheless, remained minor until the establishment of the English island colonies in the reign of James I (ruled 1603–25). A Dutch captain sailed the first cargo of Black slaves to Virginia in 1619, the year in which the colony exported 20,000 pounds (9,000 kilograms) of tobacco. The restored Stuart king, Charles II, gave English slave trade to a monopolistic company, the Royal Adventurers Trading to Africa, in 1663, but the Adventurers accomplished little because of the early outbreak of war with Holland (1665). Its successor, the [Royal African Company](https://www.britannica.com/topic/Royal-African-Company), was founded in 1672 and held the English monopoly until 1698, when all Englishmen received the right to trade in slaves. The Royal African Company continued slaving until 1731, when it abandoned slaving in favour of traffic in [ivory](https://www.britannica.com/topic/ivory) and gold dust. A new slaving company, the Merchants Trading to Africa (founded 1750), had directors in London, Liverpool, and Bristol, with Bristol furnishing the largest quota of ships, estimated at 237 in 1755. Jamaica offered the greatest single market for slaves and is believed to have received 610,000 between 1700 and 1786. The slave trade still flourished in 1763, when about 150 ships sailed yearly from British ports to Africa with capacity for nearly 40,000 slaves.

There was no well-organized opposition to the slave trade before 1800, although some individuals and [ephemeral](https://www.merriam-webster.com/dictionary/ephemeral) societies condemned it. The Spanish church saw the importation of Blacks as an opportunity for converting them. The English religionist [George Fox](https://www.britannica.com/biography/George-Fox), founder of Quakerism (founded in the 1650s), accepted the fact that his followers had bought slaves in Barbados, but he urged kind treatment. The English novelist and political pamphleteer [Daniel Defoe](https://www.britannica.com/biography/Daniel-Defoe) later denounced the traffic but seemingly regarded slavery itself as inevitable. The English and Pennsylvania Quakers passed resolutions forbidding their members to engage in the trade, but their wording suggests that some were doing so; in fact, 84 of them were members of the Merchants Trading to Africa.

Those opposing the slave trade often objected on other than humanitarian grounds. Some colonials feared any further growth of the Black percentage of the population. Others, who justified English slave sales to the Spanish colonies because payment was in cash, condemned the same traffic with French islanders, who paid in molasses and thus competed with nearby English sugar planters.

**Colonial wars of the first half of the 18th century**

From 1689 to 1763 the British and French fought four wars that were mainly European in origin but which determined the colonial situation, in some cases for two centuries. Spain entered all four, first in alliance with England and later in partnership with [France](https://www.britannica.com/place/France), though it played a secondary role.

[**King William’s War**](https://www.britannica.com/event/King-Williams-War)**(War of the League of Augsburg)**

The war known in Europe as that of the Palatinate, [League of Augsburg](https://www.britannica.com/topic/League-of-Augsburg), or Grand Alliance, and in [America](https://www.britannica.com/place/Americas) as King William’s War, ended indecisively, after eight years, with the Treaty of Rijswijk in 1697. No territorial changes occurred in America, and because the great Mughal emperor Aurangzeb reigned in [India](https://www.britannica.com/place/India), very little of the conflict penetrated there.

[**Queen Anne’s War**](https://www.britannica.com/event/Queen-Annes-War)**(War of the Spanish Succession)**

Queen Anne’s War, the American phase of the [War of the Spanish Succession](https://www.britannica.com/event/War-of-the-Spanish-Succession) (1701–14), began in 1702. Childless king Charles II of Spain, dying in 1700, willed his entire possessions to Philip, grandson of [Louis XIV](https://www.britannica.com/biography/Louis-XIV-king-of-France) of France. England, the [United Provinces](https://www.britannica.com/place/Dutch-Republic), and Austria intervened, fearing a virtual union between powerful Louis and Spain [detrimental](https://www.merriam-webster.com/dictionary/detrimental) to the [balance of power](https://www.britannica.com/topic/balance-of-power), and Queen Anne’s War lasted until terminated by the Treaty of Utrecht in 1713. England (Great Britain after 1707) gained Gibraltar and Minorca and, in [North America](https://www.britannica.com/place/North-America), acquired Newfoundland and French Acadia (renamed Nova Scotia). It also received clear title to the northern area being exploited by the [Hudson’s Bay Company](https://www.britannica.com/topic/Hudsons-Bay-Company). Bourbon prince Philip was recognized as king of Spain, but the British secured the important *asiento,* or right to supply Spanish America with slaves, for 30 years.

**King George’s War (War of the Austrian Succession)**

There followed a peace almost unbroken until 1739, when, with the *asiento* about to expire and Spain unwilling to renew it, Great Britain and Spain went to war. The recent amputation of an English seaman’s ear by a Spanish Caribbean [coast guard](https://www.britannica.com/topic/coast-guard) caused the conflict to be named the [War of Jenkins’ Ear](https://www.britannica.com/event/War-of-Jenkins-Ear). This merged in 1740 with the [War of the Austrian Succession](https://www.britannica.com/event/War-of-the-Austrian-Succession) (called [King George’s War](https://www.britannica.com/event/King-Georges-War) in America), between Frederick II the Great of Prussia and [Maria Theresa](https://www.britannica.com/biography/Maria-Theresa) of Austria over Silesia. France joined Spain and Prussia against Great Britain and Austria, and the war, which was terminated in 1748 by the [Treaty of Aix-la-Chapelle](https://www.britannica.com/event/Treaty-of-Aix-la-Chapelle), proved indecisive. [New England](https://www.britannica.com/place/New-England) colonials captured Louisbourg, the fortified French island commanding the St. Lawrence entrance, but France’s progress in India counterbalanced this conquest. With the [Mughal Empire](https://www.britannica.com/topic/Mughal-dynasty) now virtually extinct, the British and French East India Companies fought each other, the advantage going to the French under Dupleix, who captured Madras and nearly expelled the British. The peace treaty restored all conquests; France recovered Louisbourg, and the British regained Madras and with it another chance to become paramount in India.

**The**[**French and Indian War**](https://www.britannica.com/event/French-and-Indian-War)**(the Seven Years’ War)**

Until 1754, when the two powers resumed their conflict in the French and Indian War in [America](https://www.britannica.com/place/Americas), the overseas possessions maintained a show of peace. During this prewar period the French attempted to increase their hold on the Ohio Valley and in 1754 built Fort-Duquesne at the future site of Pittsburgh. Lt. Col. [George Washington](https://www.britannica.com/biography/George-Washington) with colonial forces, in 1754, and Gen. [Edward Braddock](https://www.britannica.com/biography/Edward-Braddock) with British regulars, in 1755, were defeated in attempts to dislodge them. Dupleix and his successor, Charles-Joseph Patissier, marquis de Bussy-Castelnau, increased their influence in India; but the recall of Dupleix in 1754 damaged French prospects there.

The [Seven Years’ War](https://www.britannica.com/event/Seven-Years-War), fought in [Europe](https://www.britannica.com/place/Europe) by [Frederick the Great](https://www.britannica.com/biography/Frederick-II-king-of-Prussia) of Prussia against Austria, [France](https://www.britannica.com/place/France), and Russia, ended with his survival against overwhelming odds. His one ally, Great Britain, helped financially but could render small military assistance. Overseas, the British triumphed completely over France, aided by [Spain](https://www.britannica.com/place/Spain) in the last years of the war. The French at first had the upper hand in both [India](https://www.britannica.com/place/India) and America, but the turning point came after [William Pitt the Elder](https://www.britannica.com/biography/William-Pitt-the-Elder), later earl of Chatham, assumed direction of the British war effort. In 1757 Clive won victory at Plassey over the Nawab of Bengal, an enemy of the British company; [Sir Eyre Coote’s](https://www.britannica.com/biography/Eyre-Coote) victory at Wandewash in 1760, over the French governor Thomas Lally, was followed by the capture of Pondichéry.

In America, thanks largely to the vigorous policy of Pitt, the British won repeated victories. The French forts Frontenac, Duquesne, and Carillon fell in 1758 and 1759. British generals Sir Jeffrey Amherst and [James Wolfe](https://www.britannica.com/biography/James-Wolfe) took Louisbourg in 1758, Quebec in 1759, and Montreal in 1760, and the surrender of Montreal included that of the entire French colony. Meanwhile, Adm. Edward Hawke destroyed or immobilized the principal French line fleet at Quiberon Bay in 1759. Spanish intervention in the war in 1761 merely enabled the British to seize Havana and Manila.

The [Treaty of Paris](https://www.britannica.com/event/Treaty-of-Paris-1763) in 1763 gave [Britain](https://www.britannica.com/place/Great-Britain-island-Europe) all [North America](https://www.britannica.com/place/North-America) east of the Mississippi, including Spanish Florida. France ceded the western Mississippi Valley to Spain as compensation for the loss of Florida. Besides having a clear path to domination of India in the Old World, Great Britain also gained African Senegal. In the [West Indies](https://www.britannica.com/place/West-Indies-island-group-Atlantic-Ocean), it returned Martinique and Guadeloupe to France for the sake of peace but remained easily second to Spain there in importance.

The first great era of colonial conflict had ended, and the [British Empire](https://www.britannica.com/place/British-Empire), a century and a half old, had become the world’s foremost overseas domain. Though exceeded in size by that of Spain, it was the wealthiest, backed by the overwhelming naval power of Great Britain. British [prestige](https://www.merriam-webster.com/dictionary/prestige) had reached a new height, greater perhaps than it would ever attain again.

**European expansion since 1763**

The global expansion of western [Europe](https://www.britannica.com/place/Europe) between the 1760s and the 1870s differed in several important ways from the expansionism and colonialism of previous centuries. Along with the rise of the [Industrial Revolution](https://www.britannica.com/event/Industrial-Revolution), which economic historians generally trace to the 1760s, and the continuing spread of industrialization in the empire-building countries came a shift in the strategy of trade with the colonial world. Instead of being primarily buyers of colonial products (and frequently under strain to offer sufficient salable goods to balance the exchange), as in the past, the industrializing nations increasingly became sellers in search of markets for the growing volume of their machine-produced goods. Furthermore, over the years there occurred a decided shift in the [composition](https://www.merriam-webster.com/dictionary/composition) of demand for goods produced in the colonial areas. Spices, sugar, and slaves became relatively less important with the advance of industrialization, [concomitant](https://www.merriam-webster.com/dictionary/concomitant) with a rising demand for raw materials for industry (*e.g.,* cotton, wool, vegetable oils, jute, dyestuffs) and food for the swelling industrial areas (wheat, tea, coffee, cocoa, meat, butter).

This shift in trading patterns entailed in the long run changes in colonial policy and practice as well as in the nature of colonial acquisitions. The urgency to create markets and the incessant pressure for new materials and food were eventually reflected in colonial practices, which sought to adapt the colonial areas to the new priorities of the industrializing nations. Such [adaptation](https://www.merriam-webster.com/dictionary/adaptation) involved major disruptions of existing social systems over wide areas of the globe. Before the impact of the Industrial Revolution, European activities in the rest of the world were largely confined to: (1) occupying areas that supplied [precious](https://www.merriam-webster.com/dictionary/precious) metals, slaves, and tropical products then in large demand; (2) establishing white-settler colonies along the coast of North America; and (3) setting up trading posts and forts and applying superior military strength to achieve the transfer to European merchants of as much existing world trade as was [feasible](https://www.merriam-webster.com/dictionary/feasible). However disruptive these changes may have been to the societies of Africa, [South America](https://www.britannica.com/place/South-America), and the isolated plantation and white-settler colonies, the social systems over most of the Earth outside Europe nevertheless remained much the same as they had been for centuries (in some places for millennia). These societies, with their largely self-sufficient small [communities](https://www.merriam-webster.com/dictionary/communities) based on subsistence agriculture and home industry, provided poor markets for the mass-produced goods flowing from the factories of the technologically advancing countries; nor were the existing social systems flexible enough to introduce and rapidly expand the commercial agriculture (and, later, mineral extraction) required to supply the food and raw material needs of the [empire](https://www.britannica.com/topic/empire-political-science) builders.

The adaptation of the nonindustrialized parts of the world to become more profitable adjuncts of the industrializing nations embraced, among other things: (1) overhaul of existing land and property arrangements, including the introduction of private property in land where it did not previously exist, as well as the expropriation of land for use by white settlers or for plantation agriculture; (2) creation of a labour supply for commercial agriculture and mining by means of direct [forced labour](https://www.britannica.com/topic/forced-labour) and indirect measures aimed at generating a body of wage-seeking labourers; (3) spread of the use of money and exchange of commodities by imposing money payments for taxes and land rent and by inducing a decline of home industry; and (4) where the precolonial society already had a developed industry, curtailment of production and exports by native producers.

The classic illustration of this last policy is found in [India](https://www.britannica.com/place/India). For centuries India had been an exporter of cotton goods, to such an extent that Great Britain for a long period imposed stiff [tariff](https://www.britannica.com/topic/tariff) duties to protect its domestic manufacturers from [Indian](https://www.britannica.com/topic/American-Indian) competition. Yet, by the middle of the 19th century, India was receiving one-fourth of all British exports of cotton piece goods and had lost its own export markets.

Clearly, such significant transformations could not get very far in the absence of appropriate political changes, such as the development of a sufficiently cooperative local elite, effective administrative techniques, and peace-keeping instruments that would assure social stability and [environments](https://www.merriam-webster.com/dictionary/environments) [conducive](https://www.merriam-webster.com/dictionary/conducive) to the radical social changes imposed by a foreign power. Consistent with these purposes was the installation of new, or [amendments](https://www.merriam-webster.com/dictionary/amendments) of old, legal systems that would [facilitate](https://www.merriam-webster.com/dictionary/facilitate) the operation of a money, business, and private land economy. Tying it all together was the imposition of the [culture](https://www.merriam-webster.com/dictionary/culture) and language of the dominant power.

The changing nature of the relations between centres of empire and their colonies, under the impact of the unfolding Industrial Revolution, was also reflected in new trends in colonial acquisitions. While in preceding centuries colonies, trading posts, and settlements were in the main, except for South America, located along the coastline or on smaller islands, the expansions of the late 18th century and especially of the 19th century were distinguished by the spread of the colonizing powers, or of their emigrants, into the interior of continents. Such continental extensions, in general, took one of two forms, or some combination of the two: (1) the removal of the [indigenous](https://www.merriam-webster.com/dictionary/indigenous) peoples by killing them off or forcing them into specially reserved areas, thus providing room for settlers from western Europe who then developed the agriculture and industry of these lands under the social system imported from the mother countries, or (2) the conquest of the indigenous peoples and the transformation of their existing societies to suit the changing needs of the more powerful militarily and technically advanced nations.

At the heart of Western expansionism was the growing disparity in [technologies](https://www.britannica.com/technology/history-of-technology) between those of the leading European nations and those of the rest of the world. Differences between the level of technology in Europe and some of the regions on other continents were not especially great in the early part of the 18th century. In fact, some of the crucial technical knowledge used in Europe at that time came originally from [Asia](https://www.britannica.com/place/Asia). During the 18th century, however, and at an accelerating pace in the 19th and 20th centuries, the gap between the technologically advanced countries and technologically backward regions kept on increasing despite the [diffusion](https://www.merriam-webster.com/dictionary/diffusion) of modern technology by the colonial powers. The most important aspect of this disparity was the technical superiority of Western armaments, for this superiority enabled the West to impose its will on the much larger colonial populations. Advances in communication and transportation, notably railroads, also became important tools for consolidating foreign rule over extensive territories. And along with the enormous technical superiority and the colonizing experience itself came important psychological instruments of minority rule by foreigners: [racism](https://www.britannica.com/topic/racism) and [arrogance](https://www.merriam-webster.com/dictionary/arrogance) on the part of the colonizers and a resulting spirit of inferiority among the colonized.

Naturally, the above description and summary telescope events that transpired over many decades and the incidence of the changes varied from territory to territory and from time to time, influenced by the special conditions in each area, by what took place in the process of conquest, by the circumstances at the time when economic exploitation of the possessions became desirable and feasible, and by the varying political considerations of the several occupying powers. Moreover, it should be emphasized that expansion policies and practices, while far from haphazard, were rarely the result of long-range and [integrated](https://www.merriam-webster.com/dictionary/integrated) planning. The drive for expansion was persistent, as were the pressures to get the greatest advantage possible out of the resulting opportunities. But the expansions arose in the midst of intense rivalry among major powers that were concerned with the distribution of power on the continent of Europe itself as well as with ownership of overseas territories. Thus, the issues of national power, national wealth, and military strength shifted more and more to the world stage as commerce and territorial acquisitions spread over larger segments of the globe. In fact, colonies were themselves often levers of military power—sources of military supplies and of military manpower and bases for navies and merchant marines. What appears, then, in tracing the concrete course of empire is an intertwining of the struggle for [hegemony](https://www.merriam-webster.com/dictionary/hegemony) between competing national powers, the manoeuvring for preponderance of military strength, and the search for greatest advantage practically obtainable from the world’s resources.

**European colonial activity (1763–c. 1875)**

Stages of history rarely, if ever, come in neat packages: the roots of new historical periods begin to form in earlier eras, while many aspects of an older phase linger on and help shape the new. Nonetheless, there was a convergence of developments in the early 1760s, which, despite many qualifications, [delineates](https://www.merriam-webster.com/dictionary/delineates) a new stage in European expansionism and especially in that of the most successful empire builder, Great Britain. It is not only the Industrial Revolution in Great Britain that can be traced to this period but also the consequences of England’s decisive victory over [France](https://www.britannica.com/place/France) in the [Seven Years’ War](https://www.britannica.com/event/Seven-Years-War) and the beginnings of what turned out to be the second [British Empire](https://www.britannica.com/place/British-Empire). As a result of the Treaty of Paris, France lost nearly all of its colonial empire, while [Britain](https://www.britannica.com/place/Great-Britain-island-Europe) became, except for [Spain](https://www.britannica.com/place/Spain), the largest colonial power in the world.

**The second British Empire**

The removal of threat from the strongest competing foreign power set the stage for Britain’s conquest of India and for operations against the North American Indians to extend British settlement in [Canada](https://www.britannica.com/place/Canada) and westerly areas of the North American continent. In addition, the new commanding position on the seas provided an opportunity for Great Britain to probe for additional markets in Asia and Africa and to try to break the Spanish trade monopoly in South America. During this period, the scope of British world interests broadened dramatically to cover the South Pacific, the Far East, the South Atlantic, and the coast of Africa.

The initial aim of this outburst of maritime activity was not so much the acquisition of extensive fresh territory as the attainment of a far-flung network of trading posts and maritime bases. The latter, it was hoped, would serve the interdependent aims of widening foreign commerce and controlling ocean shipping routes. But in the long run many of these initial bases turned out to be steppingstones to future territorial conquests. Because the indigenous populations did not always take kindly to foreign incursions into their homelands, even when the foreigners limited themselves to small enclaves, penetration of interiors was often necessary to secure base areas against attack.

**Loss of the American colonies**

The path of conquest and territorial growth was far from orderly. It was frequently diverted by the renewal or intensification of rivalry between, notably, England, [France](https://www.britannica.com/place/France), [Spain](https://www.britannica.com/place/Spain), and the [Low Countries](https://www.britannica.com/place/Low-Countries) in colonial areas and on the European continent. The most severe blow to Great [Britain’s](https://www.britannica.com/place/Great-Britain-island-Europe) 18th-century dreams of [empire](https://www.britannica.com/topic/empire-political-science), however, came from the revolt of the 13 [American colonies](https://www.britannica.com/topic/American-colonies). These [contiguous](https://www.merriam-webster.com/dictionary/contiguous) colonies were at the heart of the old, or what is often referred to as the first, [British Empire](https://www.britannica.com/place/British-Empire), which consisted primarily of Ireland, the North American colonies, and the plantation colonies of the [West Indies](https://www.britannica.com/place/West-Indies-island-group-Atlantic-Ocean). Ironically, the elimination of this core of the first British Empire was to a large extent influenced by the upsurge of empire building after the [Seven Years’ War](https://www.britannica.com/event/Seven-Years-War). Great Britain harvested from its victory in that war a new expanse of territory about equal to its prewar possessions on the North American continent: [French Canada](https://www.britannica.com/place/Quebec-province), the Floridas, and the territory between the Alleghenies and the [Mississippi River](https://www.britannica.com/place/Mississippi-River). The assimilation of the French Canadians, control of the Indians and settlement of the trans-Allegheny region, and the opening of new trade channels created a host of problems for the British government. Not the least of these were the burdensome costs to carry out this program on top of a huge national debt accumulated during the war. To cope with these problems, new imperial policies were adopted by the mother country: raising (for the first time) revenue from the colonies; tightening mercantile restrictions, imposing firm measures against smuggling (an important source of income for colonial merchants), and putting obstacles in the way of [New England’s](https://www.britannica.com/place/New-England) substantial trade with the West Indies. The strains generated by these policies created or intensified the hardships of large sections of the colonial population and, in addition, disrupted the relative harmony of interests that had been built up between the mother country and important elite groups in the colonies. Two additional factors, not unrelated to the enlargement of the British Empire, fed the onset and success of the American War of Independence (1775–83): first, a lessening need for military support from the mother country once the menacing French were removed from the continent and, second, support for the American Revolutionary forces from the French and Spanish, who had much to fear from the [enhanced](https://www.merriam-webster.com/dictionary/enhanced) [sea power](https://www.britannica.com/topic/sea-power) and expansionism of the British.

The shock of defeat in [North America](https://www.britannica.com/place/North-America) was not the only problem confronting British society. Ireland—in effect, a colonial dependency—also experienced a revolutionary upsurge, giving added significance to attacks by leading British free traders against existing colonial policies and even at times against colonialism itself. But such [criticism](https://www.merriam-webster.com/dictionary/criticism) had little effect except as it may have hastened colonial administrative reforms to counteract real and potential independence movements in dependencies such as [Canada](https://www.britannica.com/place/Canada) and Ireland.

**Conquest of India**

Apart from reforms of this nature, the aftermath of American independence was a diversion of British imperial interests to other areas—the beginning of the settlement of [Australia](https://www.britannica.com/place/Australia) being a case in point. In terms of amount of effort and significance of results, however, the pursuit of conquest in [India](https://www.britannica.com/place/India) took first place. Starting with the assumption of control over the province of Bengal (after the [Battle of Plassey](https://www.britannica.com/event/Battle-of-Plassey), 1757) and especially after the virtual removal of French influence from the [Indian Ocean](https://www.britannica.com/place/Indian-Ocean), the British waged more or less continuous warfare against the [Indian](https://www.britannica.com/topic/American-Indian) people and took over more and more of the interior. The Marāthās, the main source of resistance to foreign intrusion, were decisively defeated in 1803, but military resistance of one sort or another continued until the middle of the 19th century. The financing and even the military manpower for this prolonged undertaking came mainly from India itself. As British [sovereignty](https://www.merriam-webster.com/dictionary/sovereignty) spread, new land-revenue devices were soon instituted, which resulted in raising the revenue to finance the consolidation of power in India and the conquest of other regions, breaking up the old system of self-sufficient and self-perpetuating villages and supporting an elite whose self-interests would harmonize with British rule.

**Global expansion**

Except for the acquisition of additional territory in India and colonies in [Sierra Leone](https://www.britannica.com/place/Sierra-Leone) and [New South Wales](https://www.britannica.com/place/New-South-Wales), the important additions to British overseas possessions between the Seven Years’ War and the end of the Napoleonic era came as prizes of victory in wars with rival European colonial powers. In 1763 the first British Empire primarily centred on North America. By 1815, despite the loss of the 13 colonies, Britain had a second empire, one that straddled the globe from Canada and the Caribbean in the [Western Hemisphere](https://www.britannica.com/place/Western-Hemisphere) around the Cape of Good Hope to India and Australia. This empire was sustained by and in turn was supported by maritime power that far exceeded that of any of Britain’s European rivals.

**Policy changes**

The half century of global expansion is only one aspect of the transition to the second British Empire. The operations of the new empire in the longer run also reflected decisive changes in British society. The replacement of mercantile by industrial enterprise as the main source of national wealth entailed changes to make national and colonial policy more consistent with the new [hierarchy](https://www.merriam-webster.com/dictionary/hierarchy) of interests. The restrictive trade practices and monopolistic privileges that sustained the commercial explosion of the 16th and most of the 17th centuries—built around the [slave trade](https://www.britannica.com/topic/slave-trade), colonial plantations, and monopolistic trading companies—did not provide the most effective [environment](https://www.merriam-webster.com/dictionary/environment) for a nation on its way to becoming the workshop of the world.

The desired restructuring of policies occurred over decades of intense political conflict: the issues were not always clearly [delineated](https://www.merriam-webster.com/dictionary/delineated), interest groups frequently overlapped, and the [balance of power](https://www.britannica.com/topic/balance-of-power) between competing vested interests shifted from time to time. The issues were clearly drawn in some cases, as for example over the continuation of the [British East India Company’s](https://www.britannica.com/topic/East-India-Company) trade monopoly. The company’s export of Indian silk, muslins, and other cotton goods was seen by all who were involved in any way in the production of British textiles to be an obstacle to the development of markets for competing British manufactures. Political opposition to this monopoly was strong at the end of the 18th century, but the giant step on the road to [free trade](https://www.britannica.com/topic/free-trade) was not taken until the early decades of the 19th century (termination of the Indian trade monopoly, 1813; of the Chinese trade monopoly, 1833).

In contrast, the issues surrounding the strategic slave trade were much more complicated. The West Indies plantations relied on a steady flow of slaves from Africa. British merchants and ships profited not only from supplying these slaves but also from the slave trade with other colonies in the Western Hemisphere. The British were the leading slave traders, controlling at least half of the [transatlantic slave trade](https://www.britannica.com/topic/transatlantic-slave-trade) by the end of the 18th century. But the influential planter and slave-trade interests had come under vigorous and unrelenting attack by religious and humanitarian leaders and organizations, who propelled the issue of abolition to the forefront of British politics around the turn of the 19th century. Historians are still unravelling the threads of conflicting arguments about the priority of causes in the final abolition of the slave trade and, later, of slavery itself, because economic as well as political issues were at play: glutted sugar markets (to which low-cost producers in competing colonies contributed) stimulated thoughts about controlling future output by limiting the supply of fresh slaves; the compensation paid to plantation owners by the British government at the time of the abolition of slavery rescued many planters from bankruptcy during a sugar crisis, with a substantial part of the compensation money being used to pay off planters’ debts to London bankers. Moreover, the battle between proslavery and antislavery forces was fought in an environment in which free-trade interests were challenging established mercantilist practices and the West Indies sugar economy was in a [secular](https://www.merriam-webster.com/dictionary/secular) decline.

The British were not the first to abolish the slave trade. Denmark had ended it earlier, and the U.S. Constitution, written in 1787, had already provided for its termination in 1808. But the British Act of 1807 formally forbidding the slave trade was followed up by diplomatic and naval pressure to suppress the trade. By the 1820s Holland, Sweden, and France had also passed anti-slave-trade laws. Such laws and attempts to enforce them by no means stopped the trade, so long as there was buoyant demand for this commodity and good profit from dealing in it. Some decline in the demand for slaves did follow the final emancipation in 1833 of slaves in British possessions. On the other hand, the demand for slaves elsewhere in the Americas took on new life—*e.g.,* to work the virgin soils of Cuba and Brazil and to pick the rapidly expanding U.S. cotton crops to feed the voracious appetite of the British textile industry. Accordingly, the number of slaves shipped across the Atlantic accelerated at the same time Britain and other maritime powers outlawed this form of commerce.

**Involvement in Africa**

Although [Britain’s](https://www.britannica.com/place/Great-Britain-island-Europe) energetic activity to suppress the [slave trade](https://www.britannica.com/topic/slave-trade) was far from effective, its diplomatic and military operations for this end led it to much greater involvement in African affairs. Additional colonies were acquired (Sierra Leone, 1808; Gambia, 1816; Gold Coast, 1821) to serve as bases for suppressing the slave trade and for stimulating substitute commerce. British naval squadrons touring the coast of Africa, stopping and inspecting suspected slavers of other nations, and forcing African tribal chiefs to sign antislavery treaties did not halt the expansion of the slave trade, but they did help Britain attain a commanding position along the west coast of Africa, which in turn contributed to the expansion of both its commercial and colonial [empire](https://www.britannica.com/topic/empire-political-science).

**The growth of informal empire**

The transformation of the old colonial and mercantilist commercial system was completed when, in addition to the abolition of slavery and the slave trade, the Corn Laws and the [Navigation Acts](https://www.britannica.com/event/Navigation-Acts) were repealed in the late 1840s. The repeal of the Navigation Acts acknowledged the new reality: the primacy of Britain’s navy and merchant shipping. The repeal of the Corn Laws (which had protected agricultural interests) signalled the maturation of the [Industrial Revolution](https://www.britannica.com/event/Industrial-Revolution). In the light of Britain’s manufacturing supremacy, [exclusivity](https://www.merriam-webster.com/dictionary/exclusivity) and monopolistic trade restraints were less important than, and often [detrimental](https://www.merriam-webster.com/dictionary/detrimental) to, the need for ever-expanding world markets and sources of inexpensive raw materials and food.

With the new trade strategy, under the [impetus](https://www.merriam-webster.com/dictionary/impetus) of freer trade and technical progress, came a broadening of the concept of empire. It was found that the commercial and financial advantages of formal empire could often be derived by informal means. The development of a worldwide trade network, the growth of overseas banking, the export of capital to less advanced regions, the leading position of London’s money markets—all under the shield of a powerful and mobile navy—led to Great Britain’s economic preeminence and influence in many parts of the world, even in the absence of political control.

**Anticolonial sentiment**

The growing importance of informal empire went hand in hand with increased expressions of dissatisfaction with the formal colonial empire. The critical approach to empire came from leading statesmen, government officials in charge of colonial policy, the free traders, and the philosophic Radicals (the latter, a broad spectrum of opinion makers often labelled the Little Englanders, whose voices of dissent were most prominent in the years between 1840 and 1870). Taking the long view, however, some historians question just how much of this current of political thought was really concerned with the transformation of the [British Empire](https://www.britannica.com/place/British-Empire) into a Little England. Those who seriously considered colonial separation were for the most part thinking of the more recent white-settler colonies, such as [Canada](https://www.britannica.com/place/Canada), [Australia](https://www.britannica.com/place/Australia), and [New Zealand](https://www.britannica.com/place/New-Zealand), and definitely not of independence for [India](https://www.britannica.com/place/India) nor, for that matter, for Ireland. Differences of opinion among the various political factions naturally existed over the best use of limited government finance, colonial administrative tactics, how much foreign territory could in practice be controlled, and such issues as the costs of friction with the [United States](https://www.britannica.com/place/United-States) over Canada. Yet, while there were important differences of opinion on the choice between formal and informal empire, no important conflict arose over the desirability of continued expansion of Britain’s world influence and foreign commercial activity. Indeed, during the most active period of what has been presumed to be anticolonialism, both the formal and informal empires grew substantially: new colonies were added, the territory of existing colonies was enlarged, and military campaigns were conducted to widen Britain’s trading and [investment](https://www.britannica.com/topic/investment) area, as in the [Opium Wars](https://www.britannica.com/topic/Opium-Wars) of the mid-19th century.

**Decline of colonial rivalry**

An outstanding development in colonial and empire affairs during the period between the [Napoleonic Wars](https://www.britannica.com/event/Napoleonic-Wars) and the 1870s was an evident lessening in conflict between European powers. Not that conflict disappeared entirely, but the period as a whole was one of relative calm compared with either the almost continuous wars for colonial possessions in the 18th century or the revival of intense rivalries during the latter part of the 19th and early 20th centuries. Instead of wars among colonial powers during this period, there were wars against colonized peoples and their societies, incident either to initial conquest or to the extension of territorial possessions farther into the interior. Examples are Great Britain in India, Burma, [South Africa](https://www.britannica.com/place/South-Africa) (Kaffir Wars), New Zealand (Maori Wars); [France](https://www.britannica.com/place/France) in Algeria and Indochina; the [Low Countries](https://www.britannica.com/place/Low-Countries) in Indonesia; Russia in Central Asia; and the United States against the North American Indians.

Contributing to the abatement of intercolonial rivalries was the undisputable supremacy of the British Navy during these years. The increased use of steamships in the 19th century helped reinforce this supremacy: Great Britain’s ample domestic coal supply and its numerous bases around the globe (already owned or newly obtained for this purpose) combined to make available needed coaling stations. Over several decades of the 19th century and until new developments toward the end of the century opened up a new age of naval rivalry, no country was in a position to challenge Britain’s dominance of the seas. This may have temporarily weakened Britain’s acquisitive drive: the motive of preclusive occupation of foreign territory still occurred, but it was not as pressing as at other times.

On the whole, despite the relative tranquillity and the rise of anticolonial [sentiment](https://www.merriam-webster.com/dictionary/sentiment) in Britain, the era was marked by a notable wave of European expansionism. Thus, in 1800 [Europe](https://www.britannica.com/place/Europe) and its possessions, including former colonies, claimed title to about 55 percent of the Earth’s land surface: Europe, North and [South America](https://www.britannica.com/place/South-America), most of India, the Russian part of [Asia](https://www.britannica.com/place/Asia), parts of the [East Indies](https://www.britannica.com/place/East-Indies), and small sections along the coast of Africa. But much of this was merely claimed; effective control existed over a little less than 35 percent, most of which consisted of Europe itself. By 1878—that is, before the next major wave of European acquisitions began—an additional 6,500,000 square miles (16,800,000 square kilometres) were claimed; during this period, control was consolidated over the new claims and over all the territory claimed in 1800. Hence, from 1800 to 1878, actual European rule (including former colonies in North and South America) increased from 35 to 67 percent of the Earth’s land surface.

**Decline of the Spanish and Portuguese empires**

During the early 19th century, however, there was a [conspicuous](https://www.merriam-webster.com/dictionary/conspicuous) exception to the trend of colonial growth, and that was the decline of the Portuguese and Spanish empires in the [Western Hemisphere](https://www.britannica.com/place/Western-Hemisphere). The occasion for the [decolonization](https://www.britannica.com/topic/decolonization) was provided by the [Napoleonic Wars](https://www.britannica.com/event/Napoleonic-Wars). The French occupation of the [Iberian Peninsula](https://www.britannica.com/place/Iberian-Peninsula) in 1807, combined with the ensuing years of intense warfare until 1814 on that peninsula between the British and French and their respective allies, effectively isolated the colonies from their mother countries. During this isolation the long-smouldering discontents in the colonies erupted in influential nationalist movements, revolutions of independence, and civil wars. The stricken mother countries could hardly interfere with events on the South American continent, nor did they have the resources, even after the [Peninsular War](https://www.britannica.com/event/Peninsular-War) was over, to bring enough soldiers and armaments across the Atlantic to suppress the independence forces.

Great Britain could have intervened on behalf of [Spain](https://www.britannica.com/place/Spain) and Portugal, but it declined. British commerce with [South America](https://www.britannica.com/place/South-America) had blossomed during the Napoleonic Wars. New vistas of potentially profitable opportunities opened up in those years, in contrast with preceding decades when British penetration of Spanish colonial markets consisted largely of smuggling to get past Spain’s mercantile restrictions. The British therefore now favoured independence for these colonies and had little interest in helping to reimpose colonial rule, with its accompanying limitations on British trade and [investment](https://www.britannica.com/topic/investment). Support for colonial independence by the British came in several ways: merchants and financiers provided loans and supplies needed by insurrectionary governments; the [Royal Navy](https://www.britannica.com/topic/Royal-Navy) protected the shipment of those supplies and the returning specie; and the British government made it clear to other nations that it considered South American countries independent. The British forthright position on independence, as well as the availability of the Royal Navy to support this policy, gave substance to the U.S. [Monroe Doctrine](https://www.britannica.com/event/Monroe-Doctrine) (1823), which the United States had insufficient strength at that time to really enforce.

After some 15 years of uprisings and wars, Spain by 1825 no longer had any colonies in South America itself, retaining only the islands of Cuba and [Puerto Rico](https://www.britannica.com/place/Puerto-Rico). During the same period Brazil achieved its independence from Portugal. The advantages to the British economy made possible by the consequent opening up of the Latin-American ports were eagerly pursued, [facilitated](https://www.merriam-webster.com/dictionary/facilitated) by commercial treaties signed with these young nations. The reluctance of [France](https://www.britannica.com/place/France) to recognize their new status delayed French penetration of their markets and gave an advantage to the British. In one liberated area after another, brokers and commercial agents arrived from England to ferret out business opportunities. Soon the continent was flooded with British goods, often competing with much weaker native industries. Actually, [Latin America](https://www.britannica.com/place/Latin-America) provided the largest single export market for British cotton textiles in the first half of the 19th century.

Despite the absence of formal [empire](https://www.britannica.com/topic/empire-political-science), the British were able to attain economic preeminence in South America. Spanish and Portuguese colonialism had left a heritage of disunity and conflict within regions of new nations and between nations, along with conditions that led to unstable alliances of ruling elite groups. While this combination of weaknesses militated against successful self-development, it was fertile ground for energetic foreign [entrepreneurs](https://www.merriam-webster.com/dictionary/entrepreneurs), especially those who had technically advanced manufacturing capacities, capital resources, international money markets, insurance and shipping facilities, plus supportive foreign policies. The early orgy of speculative loans and investments soon ended. But before long, British economic penetration entered into more lasting and self-perpetuating activities, such as promoting Latin-American exports, providing railroad equipment, constructing [public works](https://www.britannica.com/technology/public-utility), and supplying banking networks. Thus, while the collapse of the Spanish and Portuguese empires led to the decline of colonialism in the Western Hemisphere, it also paved the way for a significant expansion of [Britain’s](https://www.britannica.com/place/Great-Britain-island-Europe) informal empire of trade, investment, and finance during the 19th century.

**The emigration of European peoples**

[Europe](https://www.britannica.com/place/Europe)an influence around the globe increased with each new wave of emigration from Europe. Tides of settlers brought with them the Old World [culture](https://www.merriam-webster.com/dictionary/culture) and, often, useful agricultural and industrial skills. An estimated 55,000,000 Europeans left their native lands in the 100 years after 1820, the product chiefly of two forces: (1) the push to emigrate as a result of difficulties arising from economic dislocations at home and (2) the pull of land, jobs, and recruitment activities of passenger shipping lines and agents of labour-hungry entrepreneurs in the New World. Other factors were also clearly at work, such as the search for religious freedom, escape from tyrannical governments, avoidance of military conscription, and the desire for greater upward social and economic mobility. Such motives had existed throughout the centuries, however, and they are insufficient to explain the massive population movements that characterized the 19th century. Unemployment induced by rapid technological changes in agriculture and industry was an important incentive for English emigration in the mid-1800s. The surge of German emigration at roughly the same time is largely attributable to an [agricultural revolution](https://www.britannica.com/topic/agricultural-revolution) in Germany, which nearly ruined many farmers on small holdings in southwestern Germany. Under English rule, the Irish were prevented from industrial development and were directed to an economy based on export of cereals grown on small holdings. A [potato blight](https://www.britannica.com/science/late-blight), followed by famine and eviction of farm tenants by landlords, gave large numbers of Irish no [alternative](https://www.merriam-webster.com/dictionary/alternative) other than emigration or starvation. These three nationalities—English, German, and Irish—composed the largest group of migrants in the 1850s. In later years Italians and Slavs contributed substantially to the population spillover. The emigrants spread throughout the world, but the bulk of the population transfer went to the Americas, Siberia, and Australasia. The population outflow, greatly facilitated by European supremacy outside Europe, helped ease the social pressures and probably abated the dangers of social upheaval in Europe itself.

**Advance of the U.S. frontier**

The outward movement of European peoples in any substantial numbers naturally was tied in with conquest and, to a greater or lesser degree, with the displacement of [indigenous](https://www.merriam-webster.com/dictionary/indigenous) populations. In the [United States](https://www.britannica.com/place/United-States), where by far the largest number of European emigrants went, acquisition of space for development by white immigrants entailed activity on two fronts: competition with rival European nations and [disposition](https://www.merriam-webster.com/dictionary/disposition) of the Indians. During a large part of the 19th century, the United States remained alert to the danger of encirclement by Europeans, but in addition the search for more fertile land, pursuit of the fur trade, and desire for ports to serve commerce in the Atlantic and Pacific oceans nourished the drive to penetrate the American continent. The most pressing points of tension with European nations were eliminated during the first half of the century: purchase of the Louisiana Territory from France in 1803 gave the United States control over the heartland of the continent; settlement of the [War of 1812](https://www.britannica.com/event/War-of-1812) ended British claims south of the 49th parallel up to the Rocky Mountains; Spain’s cession of the Floridas in 1819 rounded out the Atlantic coastal frontier; and Russia’s (1824) and Great Britain’s (1846) relinquishment of claims to the Oregon territory gave the United States its window on the Pacific. The expansion of the United States, however, was not confined to liquidating rival claims of overseas empires; it also involved taking territory from neighbouring Mexico. Settlers from the United States wrested Texas from Mexico (1836), and war against Mexico (1846–48) led to the U.S. annexation of the southwestern region between [New Mexico](https://www.britannica.com/place/New-Mexico) and Utah to the [Pacific Ocean](https://www.britannica.com/place/Pacific-Ocean).

Diplomatic and military victories over the European nations and Mexico were but one precondition for the transcontinental expansion of the United States. In addition, the [Indian](https://www.britannica.com/topic/American-Indian) tribes sooner or later had to be rooted out to clear the new territory. At times, treaties were arranged with Indian tribes, by which vast areas were opened up for white settlement. But even where peaceful agreements had been reached, the persistent pressure of the search for land and commerce created recurrent wars with Indian tribes that were seeking to retain their homes and their land. Room for the new settlers was obtained by forced removal of natives to as yet non-white-settled land—a process that was repeated as white settlers occupied ever more territory. Massacres during wars, susceptibility to infectious European diseases, and hardships endured during forced migrations all contributed to the decline in the Indian population and the weakening of its resistance. Nevertheless, Indian wars occupied the U.S. Army’s attention during most of the 19th century, ending with the eventual isolation of the surviving Indians on reservations set aside by the U.S. government.

**The new imperialism (c. 1875–1914)**

**Reemergence of colonial rivalries**

Although there are sharp differences of opinion over the reasons for, and the significance of, the “new [imperialism](https://www.britannica.com/topic/imperialism),” there is little dispute that at least two developments in the late 19th and in the beginning of the 20th century signify a new departure: (1) notable speedup in colonial acquisitions; (2) an increase in the number of colonial powers.

**New acquisitions**

The annexations during this new phase of imperial growth differed significantly from the expansionism earlier in the 19th century. While the latter was substantial in magnitude, it was primarily devoted to the consolidation of claimed territory (by penetration of continental interiors and more effective rule over [indigenous](https://www.merriam-webster.com/dictionary/indigenous) populations) and only secondarily to new acquisitions. On the other hand, the new imperialism was characterized by a burst of activity in carving up as yet independent areas: taking over almost all Africa, a good part of [Asia](https://www.britannica.com/place/Asia), and many Pacific islands. This new vigour in the pursuit of colonies is reflected in the fact that the rate of new territorial acquisitions of the new imperialism was almost three times that of the earlier period. Thus, the increase in new territories claimed in the first 75 years of the 19th century averaged about 83,000 square miles (215,000 square kilometres) a year. As against this, the colonial powers added an average of about 240,000 square miles (620,000 square kilometres) a year between the late 1870s and [World War I](https://www.britannica.com/event/World-War-I) (1914–18). By the beginning of that war, the new territory claimed was for the most part fully conquered, and the main military resistance of the indigenous populations had been suppressed. Hence, in 1914, as a consequence of this new expansion and conquest on top of that of preceding centuries, the colonial powers, their colonies, and their former colonies extended over approximately 85 percent of the Earth’s surface. Economic and political control by leading powers reached almost the entire globe, for, in addition to colonial rule, other means of domination were exercised in the form of spheres of influence, special commercial treaties, and the subordination that lenders often impose on debtor nations.

**New colonial powers**

This intensification of the drive for colonies reflected much more than a new wave of overseas activities by traditional colonial powers, including Russia. The new imperialism was distinguished particularly by the emergence of additional nations seeking slices of the colonial pie: Germany, the [United States](https://www.britannica.com/place/United-States), Belgium, Italy, and, for the first time, an Asian power, Japan. Indeed, this very multiplication of colonial powers, occurring in a relatively short period, accelerated the tempo of colonial growth. Unoccupied space that could potentially be colonized was limited. Therefore, the more nations there were seeking additional colonies at about the same time, the greater was the premium on speed. Thus, the rivalry among the colonizing nations reached new heights, which in turn strengthened the motivation for preclusive occupation of territory and for attempts to control territory useful for the military defense of existing empires against rivals.

The impact of the new upsurge of rivalry is well illustrated in the case of Great Britain. Relying on its economic preeminence in manufacturing, trade, and international finance as well as on its undisputed mastery of the seas during most of the 19th century, Great Britain could afford to relax in the search for new colonies, while concentrating on consolidation of the [empire](https://www.britannica.com/topic/empire-political-science) in hand and on building up an informal empire. But the challenge of new empire builders, backed up by increasing naval power, put a new priority on [Britain’s](https://www.britannica.com/place/Great-Britain-island-Europe) desire to extend its colonial empire. On the other hand, the more that potential colonial space shrank, the greater became the urge of lesser powers to remedy disparities in size of empires by redivision of the colonial world. The struggle over contested space and for redivision of empire generated an increase in wars among the colonial powers and an intensification of diplomatic manoeuvring.

**Rise of new industrialized nations**

Parallel with the emergence of new powers seeking a place in the colonial sun and the increasing rivalry among existing colonial powers was the rise of industrialized nations able and willing to challenge Great Britain’s lead in industry, finance, and world trade. In the mid-19th century Britain’s economy outdistanced by far its potential rivals. But, by the last quarter of that century, Britain was confronted by restless competitors seeking a greater share of world trade and finance; the [Industrial Revolution](https://www.britannica.com/event/Industrial-Revolution) had gained a strong foothold in these nations, which were spurred on to increasing industrialization with the spread of railroad lines and the maturation of [integrated](https://www.merriam-webster.com/dictionary/integrated) national markets.

Moreover, the major technological [innovations](https://www.merriam-webster.com/dictionary/innovations) of the late 19th and early 20th centuries improved the competitive potential of the newer industrial nations. Great Britain’s advantage as the progenitor of the first Industrial Revolution diminished substantially as the newer products and sources of energy of what has been called a second Industrial Revolution began to dominate industrial activity. The late starters, having digested the first Industrial Revolution, now had a more equal footing with Great Britain: they were all starting out more or less from the same base to exploit the second Industrial Revolution. This new industrialism, notably featuring mass-produced steel, [electric power](https://www.britannica.com/technology/electric-power) and oil as sources of energy, industrial chemistry, and the [internal-combustion engine](https://www.britannica.com/technology/internal-combustion-engine), spread over western [Europe](https://www.britannica.com/place/Europe), the United States, and eventually Japan.

**A world economy**

To operate efficiently, the new industries required heavy capital [investment](https://www.britannica.com/topic/investment) in large-scale units. Accordingly, they encouraged the development of capital markets and banking institutions that were large and flexible enough to finance the new enterprises. The larger capital markets and industrial enterprises, in turn, helped push forward the geographic scale of operations of the industrialized nations: more capital could now be mobilized for foreign loans and investment, and the bigger businesses had the resources for the worldwide search for and development of the raw materials essential to the success and security of their investments. Not only did the new industrialism generate a voracious appetite for raw materials, but food for the swelling urban populations was now also sought in the far corners of the world. Advances in [ship construction](https://www.britannica.com/technology/ship-construction) (steamships using steel hulls, twin screws, and [compound](https://www.merriam-webster.com/dictionary/compound) engines) made [feasible](https://www.merriam-webster.com/dictionary/feasible) the inexpensive movement of bulk raw materials and food over long ocean distances. Under the pressures and opportunities of the later decades of the 19th century, more and more of the world was drawn upon as primary producers for the industrialized nations. Self-contained economic regions dissolved into a world economy, involving an international [division of labour](https://www.britannica.com/topic/division-of-labour) whereby the leading industrial nations made and sold manufactured products and the rest of the world supplied them with raw materials and food.

**New militarism**

The complex of social, political, and economic changes that accompanied the new industrialism and the vastly expanded and [integrated](https://www.merriam-webster.com/dictionary/integrated) world commerce also provided a setting for intensified commercial rivalry, the rebuilding of high [tariff](https://www.britannica.com/topic/tariff) walls, and a revival of militarism. Of special importance militarily was the race in naval construction, which was propelled by the successful introduction and steady improvement of radically new warships that were steam driven, armour-plated, and equipped with weapons able to penetrate the new armour. Before the development of these new technologies, [Britain’s](https://www.britannica.com/place/Great-Britain-island-Europe) naval superiority was overwhelming and unchallengeable. But because Britain was now obliged in effect to build a completely new navy, other nations with adequate industrial capacities and the will to devote their resources to this purpose could challenge Britain’s supremacy at sea.

The new militarism and the intensification of colonial rivalry signalled the end of the relatively peaceful conditions of the mid-19th century. The conflict over the partition of Africa, the [South African War](https://www.britannica.com/event/South-African-War) (the Boer War), the Sino-Japanese War, the [Spanish-American War](https://www.britannica.com/event/Spanish-American-War), and the [Russo-Japanese War](https://www.britannica.com/event/Russo-Japanese-War) were among the indications that the new [imperialism](https://www.britannica.com/topic/imperialism) had opened a new era that was anything but peaceful.

The new imperialism also represented an intensification of tendencies that had originated in earlier periods. Thus, for example, the decision by the [United States](https://www.britannica.com/place/United-States) to go to war with [Spain](https://www.britannica.com/place/Spain) cannot be isolated from the long-standing interest of the United States in the Caribbean and the Pacific. The defeat of Spain and the suppression of the independence revolutions in Cuba and the Philippines gave substance to the Monroe Doctrine: the United States now became the dominant power in the Caribbean, and the door was opened for acquisition of greater influence in [Latin America](https://www.britannica.com/place/Latin-America). Possession of the Philippines was consistent with the historic interest of the United States in the commerce of the Pacific, as it had already [manifested](https://www.merriam-webster.com/dictionary/manifested) by its long interest in Hawaii (annexed in 1898) and by an expedition by Commodore Matthew Perry to Japan (1853).

**Historiographical debate**

The new imperialism marked the end of vacillation over the choice of imperialist military and political policies; similar decisions to push imperialist programs to the forefront were made by the leading industrial nations over a relatively short period. This historical conjuncture requires explanation and still remains the subject of debate among historians and social scientists. The pivot of the controversy is the degree to which the new imperialism was the product of primarily economic forces and in particular whether it was a necessary attribute of the capitalist system.

Serious analysts on both sides of the argument recognize that there is a multitude of factors involved: the main protagonists of economic imperialism recognize that political, military, and ideological influences were also at work; similarly, many who dispute the economic imperialism thesis acknowledge that economic interests played a significant role. The problem, however, is one of assigning priority to causes.

**Economic imperialism**

The father of the economic interpretation of the new imperialism was the British liberal economist John Atkinson [Hobson](https://www.britannica.com/biography/John-Atkins-Hobson). In his [seminal](https://www.merriam-webster.com/dictionary/seminal) study, *Imperialism, a Study* (first published in 1902), he pointed to the role of such drives as patriotism, philanthropy, and the spirit of adventure in advancing the imperialist cause. As he saw it, however, the critical question was why the energy of these active agents takes the particular form of imperialist expansion. Hobson located the answer in the financial interests of the capitalist class as “the governor of the imperial engine.” Imperialist policy had to be considered irrational if viewed from the vantage point of the nation as a whole: the economic benefits derived were far less than the costs of wars and armaments; and needed social reforms were shunted aside in the excitement of imperial adventure. But it was rational, indeed, in the eyes of the minority of financial interest groups. The reason for this, in Hobson’s view, was the persistent congestion of capital in manufacturing. The pressure of capital needing [investment](https://www.britannica.com/topic/investment) outlets arose in part from a maldistribution of income: low mass consuming power blocks the absorption of goods and capital inside the country. Moreover, the practices of the larger firms, especially those operating in trusts and combines, foster restrictions on output, thus avoiding the risks and waste of overproduction. Because of this, the large firms are faced with limited opportunities to invest in expanding domestic production. The result of both the maldistribution of income and monopolistic behaviour is a need to open up new markets and new investment opportunities in foreign countries.

Hobson’s study covered a broader spectrum than the analysis of what he called its economic taproot. It also examined the associated features of the new imperialism, such as political changes, racial attitudes, and [nationalism](https://www.merriam-webster.com/dictionary/nationalism). The book as a whole made a strong impression on, and greatly influenced, Marxist thinkers who were becoming more involved with the struggle against imperialism. The most influential of the Marxist studies was a small book published by [Lenin](https://www.britannica.com/biography/Vladimir-Lenin) in 1917, [*Imperialism*](https://www.britannica.com/topic/Imperialism-the-Highest-Stage-of-Capitalism)*, the Highest Stage of Capitalism.* Despite many similarities, at bottom there is a wide gulf between Hobson’s and Lenin’s frameworks of analysis and also between their respective conclusions. While Hobson saw the new imperialism serving the interests of certain capitalist groups, he believed that imperialism could be eliminated by social reforms while maintaining the capitalist system. This would require restricting the profits of those classes whose interests were closely tied to imperialism and attaining a more equitable distribution of income so that consumers would be able to buy up a nation’s production. Lenin, on the other hand, saw imperialism as being so closely [integrated](https://www.merriam-webster.com/dictionary/integrated) with the structure and normal functioning of an advanced capitalism that he believed that only the revolutionary overthrow of capitalism, with the substitution of Socialism, would rid the world of imperialism.

Lenin placed the issues of imperialism in a [context](https://www.merriam-webster.com/dictionary/context) broader than the interests of a special sector of the capitalist class. According to Lenin, capitalism itself changed in the late 19th century; moreover, because this happened at pretty much the same time in several leading capitalist nations, it explains why the new phase of capitalist development came when it did. This new phase, Lenin believed, involves political and social as well as economic changes; but its economic essence is the replacement of competitive capitalism by [monopoly](https://www.britannica.com/topic/monopoly-economics) capitalism, a more advanced stage in which finance capital, an alliance between large industrial and banking firms, dominates the economic and political life of society. Competition continues, but among a relatively small number of giants who are able to control large sectors of the national and international economy. It is this monopoly capitalism and the resulting rivalry generated among monopoly capitalist nations that foster imperialism; in turn, the processes of imperialism stimulate the further development of monopoly capital and its influence over the whole society.

The difference between Lenin’s more complex [paradigm](https://www.merriam-webster.com/dictionary/paradigm) and Hobson’s shows up clearly in the treatment of capital export. Like Hobson, Lenin maintained that the increasing importance of capital exports is a key figure of imperialism, but he attributed the phenomenon to much more than pressure from an overabundance of capital. He also saw the acceleration of capital migration arising from the desire to obtain [exclusive](https://www.merriam-webster.com/dictionary/exclusive) control over raw material sources and to get a tighter grip on foreign markets. He thus shifted the emphasis from the general problem of surplus capital, [inherent](https://www.merriam-webster.com/dictionary/inherent) in capitalism in all its stages, to the [imperatives](https://www.merriam-webster.com/dictionary/imperatives) of control over raw materials and markets in the monopoly stage. With this perspective, Lenin also broadened the concept of imperialism. Because the thrust is to divide the world among monopoly interest groups, the ensuing rivalry extends to a struggle over markets in the leading capitalist nations as well as in the less advanced capitalist and colonial countries. This rivalry is intensified because of the uneven development of different capitalist nations: the latecomers aggressively seek a share of the markets and colonies controlled by those who got there first, who naturally resist such a redivision. Other forces—political, military, and ideological—are at play in shaping the [contours](https://www.merriam-webster.com/dictionary/contours) of imperialist policy, but Lenin insisted that these influences germinate in the seedbed of monopoly capitalism.

**Noneconomic imperialism**

Perhaps the most systematic [alternative](https://www.merriam-webster.com/dictionary/alternative) theory of imperialism was proposed by [Joseph Alois Schumpeter](https://www.britannica.com/biography/Joseph-Schumpeter), one of the best known economists of the first half of the 20th century. His essay “Zur Soziologie des Imperialismus” (“The Sociology of Imperialism”) was first published in Germany in the form of two articles in 1919. Although Schumpeter was probably not familiar with Lenin’s *Imperialism* at the time he wrote his essay, his arguments were directed against the Marxist currents of thought of the early 20th century and in particular against the idea that imperialism grows naturally out of capitalism. Unlike other critics, however, Schumpeter accepted some of the components of the Marxist thesis, and to a certain extent he followed the Marxist tradition of looking for the influence of class forces and class interests as major levers of [social change](https://www.britannica.com/topic/social-change). In doing so, he in effect used the weapons of Marxist thought to rebut the essence of Marxist theory.

A survey of empires, beginning with the earliest days of written history, led Schumpeter to conclude that there are three generic characteristics of imperialism: (1) At root is a persistent tendency to war and conquest, often producing nonrational expansions that have no sound utilitarian aim. (2) These urges are not innate in man. They evolved from critical experiences when peoples and classes were molded into warriors to avoid extinction; the warrior mentality and the interests of warrior classes live on, however, and influence events even after the vital need for wars and conquests disappears. (3) The drift to war and conquest is sustained and conditioned by the domestic interests of ruling classes, often under the leadership of those individuals who have most to gain economically and socially from war. But for these factors, Schumpeter believed, imperialism would have been swept away into the dustbin of history as capitalist society ripened; for capitalism in its purest form is [antithetical](https://www.merriam-webster.com/dictionary/antithetical) to imperialism: it thrives best with peace and [free trade](https://www.britannica.com/topic/free-trade). Yet despite the innate peaceful nature of capitalism, interest groups do emerge that benefit from aggressive foreign conquests. Under monopoly capitalism the fusion of big banks and cartels creates a powerful and influential [social group](https://www.britannica.com/topic/social-group) that pressures for exclusive control in colonies and protectorates, for the sake of higher profits.

Notwithstanding the resemblance between Schumpeter’s discussion of monopoly and that of Lenin and other Marxists, a crucial difference does remain. Monopoly capitalism in Lenin’s [frame of reference](https://www.britannica.com/science/reference-frame) is a natural outgrowth of the previous stage of competitive capitalism. But according to Schumpeter, it is an artificial graft on the more natural competitive capitalism, made possible by the catalytic effect of the residue from the preceding feudal society. Schumpeter argued that monopoly capitalism can only grow and prosper under the protection of high [tariff](https://www.britannica.com/topic/tariff) walls; without that shield there would be large-scale industry but no cartels or other monopolistic arrangements. Because tariff walls are erected by political decisions, it is the [state](https://www.britannica.com/topic/state-sovereign-political-entity) and not a natural economic process that promotes monopoly. Therefore, it is in the nature of the state—and especially those features that blend the heritage of the previous autocratic state, the old war machine, and feudal interests and ideas along with capitalist interests—that the cause of imperialism will be discovered. The particular form of imperialism in modern times is affected by capitalism, and capitalism itself is modified by the imperialist experience. In Schumpeter’s analysis, however, imperialism is not an inevitable product of capitalism.

**Quest for a general theory of imperialism**

The main trend of academic thought in the Western world is to follow Schumpeter’s conclusion—that modern [imperialism](https://www.britannica.com/topic/imperialism) is not a product of capitalism—without paying close attention to Schumpeter’s sophisticated sociological analysis. Specialized studies have produced a variety of interpretations of the origin or reawakening of the new imperialism: for [France](https://www.britannica.com/place/France), [bolstering](https://www.merriam-webster.com/dictionary/bolstering) of national [prestige](https://www.merriam-webster.com/dictionary/prestige) after its defeat in the [Franco-German War](https://www.britannica.com/event/Franco-German-War) (1870–71); for Germany, Bismarck’s design to stay in power when threatened by political rivals; for England, the desire for greater military security in the Mediterranean and [India](https://www.britannica.com/place/India). These reasons—along with other frequently mentioned contributing causes, such as the spirit of national and racial superiority and the drive for power—are still matters of controversy with respect to specific cases and to the problem of fitting them into a general theory of imperialism. For example, if it is found that a new colony was acquired for better military defense of existing colonies, the questions still remain as to why the existing colonies were acquired in the first place and why it was considered necessary to defend them rather than to give them up. Similarly, explanations in terms of the search for power still have to account for the close relationship between power and wealth, because in the real world adequate economic resources are needed for a nation to hold on to its power, let alone to increase it. Conversely, increasing a nation’s wealth often requires power. As is characteristic of historical phenomena, imperialist expansion is conditioned by a nation’s previous history and the particular situation preceding each expansionist move. Moreover, it is carried forth in the midst of a complex of political, military, economic, and psychological impulses. It would seem, therefore, that the attempt to arrive at a theory that explains each and every imperialist action—ranging from a semifeudal Russia to a relatively undeveloped Italy to an industrially powerful Germany—is a vain pursuit. But this does not eliminate the more important challenge of constructing a theory that will provide a meaningful interpretation of the almost simultaneous eruption of the new imperialism in a whole group of leading powers.

**Penetration of the West in Asia and Africa**

[**Russia’s**](https://www.britannica.com/topic/history-of-Russia)**eastward expansion**

European nations and Japan at the end of the 19th century spread their influence and control throughout the continent of [Asia](https://www.britannica.com/place/Asia). Russia, because of its geographic position, was the only occupying power whose Asian conquests were overland. In that respect there is some similarity between Russia and the [United States](https://www.britannica.com/place/United-States) in the forcible outward push of their continental frontiers. But there is a significant difference: the United States advance displaced the [indigenous](https://www.merriam-webster.com/dictionary/indigenous) population, with the remaining Indians becoming wards of the state. On the other hand, the Russian march across Asia resulted in the incorporation of alien [cultures](https://www.merriam-webster.com/dictionary/cultures) and societies as virtual colonies of the [Russian Empire](https://www.britannica.com/place/Russian-Empire), while providing room for the absorption of Russian settlers.

Although the conquest of Siberia and the drive to the Pacific had been periodically absorbing Russia’s military energies since the 16th century, the acquisition of additional Asian territory and the [economic integration](https://www.britannica.com/topic/economic-integration) of previously acquired territory took a new turn in the 19th century. Previously, Russian influence in its occupied territory was quite limited, without marked alteration of the social and economic structure of the conquered peoples. Aside from looting and exacting tribute from subject tribes, the major objects of interest were the fur trade, increased commerce with [China](https://www.britannica.com/place/China) and in the Pacific, and land. But changes in 19th-century Russian society, especially those coming after the [Crimean War](https://www.britannica.com/event/Crimean-War) (1853–56), signaled a new departure. First, Russia’s resounding defeat in that war temporarily frustrated its [aspirations](https://www.merriam-webster.com/dictionary/aspirations) in the Balkans and the Near East; but, because its dynastic and military ambitions were in no way diminished, its expansionist energies turned with increased vigour to its Asian frontiers. Second, the emancipation of the serfs (1861), which eased the feudal restrictions on the landless peasants, led to large waves of migration by Russians and Ukrainians—first to Siberia and later to [Central Asia](https://www.britannica.com/place/Central-Asia). Third, the surge of industrialization, [foreign trade](https://www.britannica.com/topic/international-trade), and railway building in the post-Crimean War decades paved the way for the [integration](https://www.merriam-webster.com/dictionary/integration) of Russian Asia, which formerly, for all practical purposes, had been composed of separate dependencies, and for a new type of subjugation for many of these areas, especially in Central Asia, in which the conquered societies were “colonized” to suit the political and economic needs of the conqueror.

This process of acquisition and consolidation in Asia spread out in four directions: Siberia, the Far East, the Caucasus, and Central Asia. This pursuit of tsarist ambitions for [empire](https://www.britannica.com/topic/empire-political-science) and for warm-water ports involved numerous clashes and conflicts along the way. Russian expansion was ultimately limited not by the fierce opposition of the native population, which was at times a stumbling block, but by the counterpressure of competitive empire builders, such as Great Britain and Japan. Great Britain and Russia were mutually alarmed as the distances between the expanding frontiers of Russia and India shortened. One point of conflict was finally resolved when both powers agreed on the delimitation of the northern border of Afghanistan. A second major area of conflict in Central Asia was settled by an Anglo-Russian treaty (1907) to divide Persia into two separate spheres of influence, leaving a nominally independent Persian nation.

As in the case of Afghanistan and Persia, penetration of [Chinese](https://www.britannica.com/topic/history-of-China) territory produced clashes with both the native government and other imperialist powers. At times China’s preoccupation with its struggle against other invading powers eased the way for Russia’s penetration. Thus, in 1860, when Anglo-French soldiers had entered Peking, Russia was able to wrest from China the Amur Province and special privileges in Manchuria (Northeast Provinces) south of the [Amur River](https://www.britannica.com/place/Amur-River). With this as a stepping-stone, Russia took over the seacoast north of [Korea](https://www.britannica.com/place/Korea) and founded the town of Vladivostok. But, because the Vladivostok harbour is icebound for some four months of the year, the Russians began to pay more attention to getting control of the Korean coastline, where many good year-round harbours could be found. Attempts to acquire a share of Korea, as well as all of Manchuria, met with the resistance of [Britain](https://www.britannica.com/place/Great-Britain-island-Europe) and Japan. Further thrusts into China beyond the Amur and maritime provinces were finally thwarted by defeat in 1905 in the [Russo-Japanese War](https://www.britannica.com/event/Russo-Japanese-War).

**The partitioning of China**

The evolution of the penetration of Asia was naturally influenced by a multiplicity of factors—economic and political conditions in the expanding nations, the strategy of the military officials of the latter nations, the problems facing colonial rulers in each locality, pressures arising from white settlers and businessmen in the colonies, as well as the constraints imposed by the always limited economic and military resources of the imperialist powers. All these elements were present to a greater or lesser extent at each stage of the forward push of the colonial frontiers by the Dutch in [Indonesia](https://www.britannica.com/place/Indonesia), the French in Indochina (Vietnam, Laos, Cambodia), and the British in Malaya, Burma, and Borneo.

Yet, despite the variety of influences at work, three general types of penetration stand out. One of these is expansion designed to overcome resistance to foreign rule. Resistance, which assumed many forms ranging from outright rebellion to sabotage of colonial political and economic domination, was often strongest in the border areas farthest removed from the centres of colonial power. The consequent extension of military control to the border regions tended to arouse the fears and opposition of neighbouring states or tribal societies and thus led to the further extension of control. Hence, attempts to achieve military security prompted the addition of border areas and neighbouring nations to the original colony.

A second type of expansion was a response to the economic opportunities offered by exploitation of the colonial interiors. Traditional trade and the free play of market forces in Asia did not produce huge supplies of raw materials and food or the enlarged export markets sought by the industrializing colonial powers. For this, [entrepreneurs](https://www.merriam-webster.com/dictionary/entrepreneurs) and capital from abroad were needed, mines and plantations had to be organized, labour supplies mobilized, and money economies created. All these alien intrusions functioned best under the firm security of an accommodating alien law and order.

The third type of expansion was the result of rivalry among colonial powers. When possible, new territory was acquired or old possessions extended in order either to preclude occupation by rivals or to serve as buffers for military security against the expansions of nearby colonial powers. Where the crosscurrents of these rivalries prevented any one power from obtaining [exclusive](https://www.merriam-webster.com/dictionary/exclusive) control, various substitute arrangements were arrived at: parts of a country were chipped off and occupied by one or more of the powers; spheres of influence were partitioned; unequal commercial treaties were imposed—while the countries subjected to such treatment remained nominally independent.

The penetration of China is the outstanding example of this type of expansion. In the early 19th century the middle part of eastern Asia (Japan, Korea, and China), containing about half the Asian population, was still little affected by Western penetration. By the end of the century, Korea was on the way to becoming annexed by Japan, which had itself become a leading imperialist power. China remained independent politically, though it was already extensively dominated by outside powers. Undoubtedly, the intense rivalry of the foreign powers helped save China from being taken over outright (as India had been). China was pressed on all sides by competing powers anxious for its trade and territory: Russia from the north, Great Britain (via India and Burma) from the south and west, France (via Indochina) from the south, and Japan and the United States (in part, via the Philippines) from the east.

**The**[**Opium Wars**](https://www.britannica.com/topic/Opium-Wars)

The first phase of the forceful penetration of [China](https://www.britannica.com/place/China) by western [Europe](https://www.britannica.com/place/Europe) came in the two [Opium Wars](https://www.britannica.com/topic/Opium-Wars). Great Britain had been buying increasing quantities of tea from China, but it had few products that China was interested in buying by way of exchange. A resulting steady drain of British silver to pay for the tea was eventually stopped by Great [Britain’s](https://www.britannica.com/place/Great-Britain-island-Europe) ascendancy in [India](https://www.britannica.com/place/India). With British merchants in control of India’s [foreign trade](https://www.britannica.com/topic/international-trade) and with the financing of this trade centred in London, a three-way exchange developed: the tea Britain bought in China was paid for by India’s exports of opium and cotton to China. And because of a rapidly increasing demand for tea in England, British merchants actively fostered the profitable exports of opium and cotton from India.

An increasing Chinese addiction to opium fed a boom in imports of the drug and led to an unfavourable trade balance paid for by a steady loss of China’s silver reserves. In light of the economic effect of the [opium trade](https://www.britannica.com/topic/opium-trade) plus the physical and mental deterioration of opium users, Chinese authorities banned the opium trade. At first this posed few obstacles to British merchants, who resorted to smuggling. But enforcement of the ban became stringent toward the end of the 1830s; stores of opium were confiscated, and warehouses were closed down. British merchants had an additional and longstanding grievance because the Chinese limited all trade by foreigners to the port of Canton.

In June 1840 the British fleet arrived at the mouth of the Canton River to begin the Opium War. The Chinese [capitulated](https://www.merriam-webster.com/dictionary/capitulated) in 1842 after the fleet reached the Yangtze, Shanghai fell, and Nanking was under British guns. The resulting [Treaty of Nanking](https://www.britannica.com/event/Treaty-of-Nanjing)—the first in a series of commercial treaties China was forced to sign over the years—provided for: (1) cession of [Hong Kong](https://www.britannica.com/place/Hong-Kong) to the British crown; (2) the opening of five treaty ports, where the British would have residence and trade rights; (3) the right of British nationals in China who were accused of criminal acts to be tried in British courts; and (4) the limitation of duties on imports and exports to a modest rate. Other countries soon took advantage of this forcible opening of China; in a few years similar treaties were signed by China with the [United States](https://www.britannica.com/place/United-States), [France](https://www.britannica.com/place/France), and Russia.

The Chinese, however, tried to retain some independence by preventing foreigners from entering the interior of China. With the country’s economic and social institutions still intact, markets for Western goods, such as cotton textiles and machinery, remained disappointing: the self-sufficient [communities](https://www.merriam-webster.com/dictionary/communities) of China were not disrupted as those in India had been under direct British rule, and opium smuggling by British merchants continued as a major component of China’s foreign trade. Western merchants sought further [concessions](https://www.merriam-webster.com/dictionary/concessions) to improve markets. But meanwhile China’s weakness, along with the stresses induced by foreign intervention, was further intensified by an upsurge of peasant rebellions, especially the massive 14-year [Taiping Rebellion](https://www.britannica.com/event/Taiping-Rebellion) (1850–64).

The Western powers took advantage of the increasing difficulties by pressing for even more favourable trade treaties, culminating in a second war against China (1856–60), this time by France and England. Characteristically, the Western powers invading China played a double role: in addition to forcing a new trade treaty, they also helped to sustain the Chinese ruling establishment by participating in the suppression of the Taiping Rebellion; they believed that a Taiping victory would result in a reformed and centralized China, more resistant to Western penetration. China’s defeat in the second war with the West produced a series of treaties, signed at Tientsin with Britain, France, Russia, and the United States, which brought the Western world deeper into China’s affairs. The Tientsin treaties provided, among other things, for the right of foreign nationals to travel in the interior, the right of foreign ships to trade and patrol on the [Yangtze River](https://www.britannica.com/place/Yangtze-River), the opening up of more treaty ports, and additional [exclusive](https://www.merriam-webster.com/dictionary/exclusive) legal jurisdiction by foreign powers over their nationals residing in China.

**Foreign privileges in China**

Treaties of this general nature were extended over the years to grant further privileges to foreigners. Furthermore, more and more Western nations—including Germany, Italy, Denmark, The Netherlands, [Spain](https://www.britannica.com/place/Spain), Belgium, and Austria-Hungary—took advantage of the new opportunities by signing such treaties. By the beginning of the 20th century, some 90 Chinese ports had been opened to foreign control. While the Chinese government retained [nominal](https://www.merriam-webster.com/dictionary/nominal) [sovereignty](https://www.merriam-webster.com/dictionary/sovereignty) in these ports, de facto rule was exercised by one or more of the powers: in Shanghai, for example, Great Britain and the United States coalesced their interests to form the Shanghai International Settlement. In most of the treaty ports, China leased substantial areas of land at low rates to foreign governments. The consulates in these concessions exercised legal jurisdiction over their nationals, who thereby escaped China’s laws and tax collections. The foreign settlements had their own police forces and tax systems and ran their own affairs independently of nominally [sovereign](https://www.merriam-webster.com/dictionary/sovereign) China.

These settlements were not the only intrusion on China’s sovereignty. In addition, the opium trade was finally legalized, customs duties were forced downward to [facilitate](https://www.merriam-webster.com/dictionary/facilitate) competition of imported Western goods, foreign gunboats patrolled China’s rivers, and aliens were placed on customs-collection staffs to ensure that China would pay the indemnities imposed by various treaties. In response to these indignities and amid growing antiforeign [sentiment](https://www.merriam-webster.com/dictionary/sentiment), the Chinese government attempted reforms to modernize and develop sufficient strength to resist foreign intrusions. Steps were taken to master Western science and technology, erect shipyards and arsenals, and build a more effective army and navy. The reforms, however, did not get very far: they did not tackle the roots of China’s vulnerability, its social and political structure; and they were undertaken quite late, after foreign nations had already established a strong foothold. Also, it is likely that the reforms were not wholehearted because two opposing tendencies were at play: on the one hand, a wish to seek independence and, on the other hand, a basic reliance on foreign support by a weak Manchu government beset with rebellion and internal opposition.

**The**[**Open Door Policy**](https://www.britannica.com/event/Open-Door-policy)

In any event, preliminary attempts to Westernize Chinese society from within did not deter further foreign penetration; nor did the subsequent revolution (1911) succeed in freeing [China](https://www.britannica.com/place/China) from Western domination. Toward the end of the 19th century, under the impact of the new [imperialism](https://www.britannica.com/topic/imperialism), the spread of foreign penetration accelerated. Germany entered a vigorous bid for its sphere of influence; Japan and Russia pushed forward their territorial claims; and U.S. commercial and financial penetration of the Pacific, with naval vessels patrolling Chinese rivers, was growing rapidly. But at the same time this mounting foreign interest also [inhibited](https://www.merriam-webster.com/dictionary/inhibited) the outright partition of China. Any step by one of the powers toward outright partition or sizable enlargement of its sphere of influence met with strong opposition from other powers. This led eventually to the Open Door Policy, advocated by the [United States](https://www.britannica.com/place/United-States), which limited or restricted [exclusive](https://www.merriam-webster.com/dictionary/exclusive) privileges of any one power vis-à-vis the others. It became generally accepted after the antiforeign [Boxer Rebellion](https://www.britannica.com/event/Boxer-Rebellion) (1900) in China. With the foreign armies that had been brought in to suppress the rebellion now stationed in North China, the danger to the continued existence of the Chinese government and the danger of war among the imperialist powers for their share of the country seemed greater than ever. Agreement on the [Open Door Policy](https://www.britannica.com/event/Open-Door-policy) helped to retain both a [compliant](https://www.merriam-webster.com/dictionary/compliant) native government and [equal opportunity](https://www.britannica.com/topic/equal-opportunity) for commerce, finance, and [investment](https://www.britannica.com/topic/investment) by the more advanced nations.

[**Japan’s**](https://www.britannica.com/topic/history-of-Japan)**rise as a colonial power**

Japan was the only Asian country to escape colonization from the West. European nations and the United States tried to “open the door,” and to some extent they succeeded; but Japan was able to shake off the kind of subjugation, informal or formal, to which the rest of [Asia](https://www.britannica.com/place/Asia) [succumbed](https://www.merriam-webster.com/dictionary/succumbed). Even more important, it moved onto the same road of industrialization as did [Europe](https://www.britannica.com/place/Europe) and the United States. And instead of being colonized it became one of the colonial powers.

Japan had traditionally sought to avoid foreign intrusion. For many years, only the Dutch and the Chinese were allowed trading depots, each having access to only one port. No other foreigners were permitted to land in Japan, though Russia, [France](https://www.britannica.com/place/France), and England tried, but with little success. The first significant crack in Japan’s trade and travel barriers was forced by the United States in an effort to guarantee and strengthen its shipping interests in the Far East. Japan’s guns and ships were no match for those of Commodore Perry in his two U.S. naval expeditions to Japan (1853, 1854).

The Japanese, well aware of the [implications](https://www.merriam-webster.com/dictionary/implications) of foreign penetration through observing what was happening to China, tried to limit Western trade to two ports. In 1858, however, Japan agreed to a full commercial treaty with the United States, followed by similar treaties with the [Low Countries](https://www.britannica.com/place/Low-Countries), Russia, France, and [Britain](https://www.britannica.com/place/Great-Britain-island-Europe). The treaty pattern was familiar: more ports were opened; resident foreigners were granted extraterritorial rights, as in China; import and export duties were predetermined, thus removing control that Japan might otherwise exercise over its [foreign trade](https://www.britannica.com/topic/international-trade).

Many attempts have been made to explain why a weak Japan was not taken over as a colony or, at least, did not follow in China’s footsteps. Despite the absence of a commonly accepted theory, two factors were undoubtedly crucial. On the one hand, the Western nations did not pursue their attempts to control Japan as aggressively as they did elsewhere. In Asia the interests of the more aggressively expanding powers had centred on [India](https://www.britannica.com/place/India), China, and the immediately surrounding areas. When greater interest developed in a possible breakthrough in Japan in the 1850s and 1860s, the leading powers were occupied with other pressing affairs, such as the 1857 [Indian](https://www.britannica.com/topic/American-Indian) mutiny, the [Taiping Rebellion](https://www.britannica.com/event/Taiping-Rebellion), the [Crimean War](https://www.britannica.com/event/Crimean-War), French intervention in Mexico, and the U.S. Civil War. International jealousy may also have played a role in deterring any one power from trying to gain exclusive control over the country. On the other hand, in Japan itself, the danger of foreign military intervention, a crisis in its traditional feudal society, the rise of commerce, and a disaffected peasantry led to an intense internal power struggle and finally to a revolutionary change in the country’s society and a thoroughgoing modernization program, one that brought Japan the economic and military strength to resist foreign nations.

The opposing forces in Japan’s civil war were lined up between the supporters of the ruling Tokugawa family, which headed a rigid hierarchical feudal society, and the supporters of the emperor [Meiji](https://www.britannica.com/biography/Meiji), whose court had been isolated from any significant government role. The civil war culminated in 1868 in the overthrow of the Tokugawa government and the restoration of the rule of the Emperor. The [Meiji Restoration](https://www.britannica.com/event/Meiji-Restoration) also brought new interest groups to the centre of political power and instigated a radical redirection of Japan’s economic development. The nub of the changeover was the destruction of the traditional feudal social system and the building of a political, social, and economic framework [conducive](https://www.merriam-webster.com/dictionary/conducive) to capitalist industrialization. The new state actively participated in the turnabout by various forms of grants and guarantees to enterprising industrialists and by direct investment in basic industries such as railways, shipbuilding, communications, and machinery. The concentration of resources in the industrial sector was matched by social reforms that eliminated feudal restrictions, accelerated mass [education](https://www.britannica.com/topic/education), and encouraged acquisition of skills in the use of Western technology. The ensuing industrialized economy provided the means for Japan to hold its own in modern warfare and to withstand foreign economic competition.

Soon Japan not only followed the Western path of internal industrialization, but it also began an outward aggression resembling that of the European nations. First came the acquisition and colonization of neighbouring islands: [Ryukyu Islands](https://www.britannica.com/place/Ryukyu-Islands) (including Okinawa), the [Kuril Islands](https://www.britannica.com/place/Kuril-Islands), [Bonin Islands](https://www.britannica.com/place/Bonin-Islands), and Hokkaido. Next in Japan’s expansion program was Korea, but the opposition of other powers postponed the transformation of Korea into a Japanese colony. The pursuit of influence in Korea involved Japan in war with China (1894–95), at the end of which China recognized Japan’s interest in Korea and ceded to Japan Taiwan, the Pescadores, and southern [Manchuria](https://www.britannica.com/place/Manchukuo). At this point rival powers interceded to force Japan to forgo taking over the southern Manchuria peninsula. While France, Britain, and Germany were involved in seeking to frustrate Japan’s imperial ambitions, the most direct clash was with Russia over Korea and Manchuria. Japan’s defeat of [Russia](https://www.britannica.com/event/Russo-Japanese-War) in the war of 1904–05 procured for Japan the lease of the Liaotung Peninsula, the southern part of the island of Sakhalin, and recognition of its “paramount interest” in Korea. Still, pressure by Britain and the United States kept Japan from fulfillment of its plan to possess Manchuria outright. By the early 20th century, however, Japan had, by means of economic and political penetration, attained a privileged position in that part of China, as well as colonies in Korea and Taiwan and neighbouring islands.

**Partition of**[**Africa**](https://www.britannica.com/place/Africa)

By the turn of the 20th century, the map of Africa looked like a huge [jigsaw puzzle](https://www.britannica.com/topic/jigsaw-puzzle), with most of the boundary lines having been drawn in a sort of game of give-and-take played in the foreign offices of the leading European powers. The division of Africa, the last continent to be so carved up, was essentially a product of the new [imperialism](https://www.britannica.com/topic/imperialism), vividly highlighting its essential features. In this respect, the timing and the pace of the scramble for Africa are especially noteworthy. Before 1880 colonial possessions in Africa were relatively few and limited to coastal areas, with large sections of the coastline and almost all the interior still independent. By 1900 Africa was almost entirely divided into separate territories that were under the administration of European nations. The only exceptions were Liberia, generally regarded as being under the special protection of the United States; Morocco, conquered by [France](https://www.britannica.com/place/France) a few years later; Libya, later taken over by Italy; and Ethiopia.

The second feature of the new imperialism was also strongly evident. It was in Africa that [Germany](https://www.britannica.com/topic/history-of-Germany) made its first major bid for membership in the club of colonial powers: between May 1884 and February 1885, Germany announced its claims to territory in [South West Africa](https://www.britannica.com/place/Namibia) (now South West Africa/Namibia), Togoland, Cameroon, and part of the East African coast opposite Zanzibar. Two smaller nations, Belgium and Italy, also entered the ranks, and even Portugal and [Spain](https://www.britannica.com/place/Spain) once again became active in bidding for African territory. The increasing number of participants in itself sped up the race for conquest. And with the heightened rivalry came more intense concern for preclusive occupation, increased attention to military arguments for additional buffer zones, and, in a period when [free trade](https://www.britannica.com/topic/free-trade) was giving way to protective tariffs and discriminatory practices in colonies as well as at home, a growing urgency for protected overseas markets. Not only the wish but also the means were at hand for this carving up of the African pie. Repeating rifles, machine guns, and other advances in weaponry gave the small armies of the conquering nations the effective power to defeat the much larger armies of the peoples of Africa. Rapid railroad construction provided the means for military, political, and economic consolidation of continental interiors. With the new steamships, settlers and materials could be moved to Africa with greater dispatch, and bulk shipments of raw materials and food from Africa, prohibitively costly for some products in the days of the sailing ship, became economically [feasible](https://www.merriam-webster.com/dictionary/feasible) and profitable.

Penetration of Islāmic [North Africa](https://www.britannica.com/topic/history-of-North-Africa) was complicated, on the one hand, by the struggle among European powers for control of the [Mediterranean Sea](https://www.britannica.com/place/Mediterranean-Sea) and, on the other hand, by the suzerainty that the [Ottoman Empire](https://www.britannica.com/place/Ottoman-Empire) exercised to a greater or lesser extent over large sections of the region. Developments in both respects contributed to the wave of partition toward the end of the 19th century. First, Ottoman power was perceptibly waning: the military balance had tipped decisively in favour of the European nations, and Turkey was becoming increasingly dependent on loans from European centres of capital (in the late 1870s Turkey needed half of its government income just to service its foreign debt). Second, the importance of domination of the Mediterranean increased significantly after the Suez Canal was opened in 1869.

France was the one European nation that had established a major beachhead in Islāmic North Africa before the 1880s. At a time when Great Britain was too preoccupied to interfere, the French captured the fortress of Algiers in 1830. Frequent revolts kept the French Army busy in the [Algerian](https://www.britannica.com/topic/history-of-Algeria) interior for another 50 years before all Algeria was under full French rule. While Tunisia and Egypt had been areas of great interest to European powers during the long period of France’s Algerian takeover, the penetration of these countries had been informal, confined to diplomatic and financial maneuvers. Italy, as well as France and England, had loaned large sums to the ruling *bey*s of Tunisia to help loosen that country’s ties with Turkey. The inability of the *bey*s to service the foreign debt in the 1870s led to the installation of debt commissioners by the lenders. Tunisia’s revenues were pledged to pay the interest due on outstanding bonds; in fact, the debt charges had first call on the government’s income. With this came increased pressure on the people for larger tax payments and a growing popular dissatisfaction with a government that had “sold out” to foreigners. The weakness of the ruling group, intensified by the danger of popular revolt or a military coup, opened the door further for formal occupation by one of the interested foreign powers. When Italy’s actions showed that it might be preparing for outright possession, France jumped the gun by invading Tunisia in 1881 and then completed its conquest by defeating the rebellions precipitated by this occupation.

**The Europeans in North Africa**

The course of [Egypt’s](https://www.britannica.com/topic/history-of-Egypt) loss of [sovereignty](https://www.merriam-webster.com/dictionary/sovereignty) resembled somewhat the same process in Tunisia: easy credit extended by Europeans, bankruptcy, increasing control by foreign-debt commissioners, mulcting of the peasants to raise revenue for servicing the debt, growing independence movements, and finally military conquest by a foreign power. In Egypt, inter-imperialist rivalry, mainly between Great Britain and France, reached back to the early 19th century but was intensified under the circumstances of the new imperialism and the construction of the [Suez Canal](https://www.britannica.com/topic/Suez-Canal). By building the Suez Canal and financing Egypt’s ruling group, France had gained a prominent position in Egypt. But [Britain’s](https://www.britannica.com/place/Great-Britain-island-Europe) interests were perhaps even more pressing because the Suez Canal was a strategic link to its empire and its other Eastern trade and colonial interests. The successful nationalist revolt headed by the Egyptian army imminently threatened in the 1880s the interests of both powers. France, occupied with war in Tunisia and with internal political problems, did not participate in the military intervention to suppress the revolt. Great Britain bombarded Alexandria in 1882, landed troops, and thus obtained control of Egypt. Unable to find a stable collaborationist government that would also pay Egypt’s debts and concerned with suppressing not only the rebellion but also a powerful anti-Egyptian Mahdist revolt in the Sudan, Britain completely took over the reins of government in Egypt.

The rest of North Africa was carved up in the early 20th century. France, maneuvering for possession of [Morocco](https://www.britannica.com/topic/history-of-Morocco), which bordered on her Algerian colony, tried to obtain the acquiescence of the other powers by both secret and open treaties granting Italy a free hand in Libya, allotting to Spain a sphere of influence, and acknowledging Britain’s paramountcy in Egypt. France had, however, overlooked Germany’s ambitions, now backed by an increasingly effective army and navy. The tension created by Germany led to an international conference at [Algeciras](https://www.britannica.com/event/Algeciras-Conference) (1906), which produced a short-lived compromise, including recognition of France’s paramount interest, Spanish participation in policing Morocco, and an open door for the country’s economic penetration by other nations. But France’s vigorous pursuit of her claims, reinforced by the occupation of Casablanca and surrounding territory, precipitated critical confrontations, which reached their peak in 1911 when French troops were suppressing a Moroccan revolt and a German cruiser appeared before Agadir in a show of force. The resulting settlements completed the European partition of North Africa: France obtained the lion’s share of Morocco; in return, Germany received a large part of the French Congo; Italy was given the green light for its war with Turkey over control of Tripoli, the first step in its eventual acquisition of Libya; and Spain was enabled to extend its [Río de Oro](https://www.britannica.com/place/Rio-de-Oro) [protectorate](https://www.britannica.com/topic/protectorate-international-relations) to the southern frontier of Morocco. The more or less peaceful trade-offs by the occupying powers differed sharply from the long, bitter, and expensive wars they waged against the [indigenous](https://www.merriam-webster.com/dictionary/indigenous) peoples and rulers of Islāmic North Africa to solidify European rule.

**The race for colonies in sub-Saharan Africa**

The partition of Africa below the Sahara took place at two levels: (1) on paper—in deals made among colonial powers who were seeking colonies partly for the sake of the colonies themselves and partly as pawns in the power play of European nations struggling for world dominance—and (2) in the field—in battles of conquest against African states and tribes and in military confrontations among the rival powers themselves. This process produced, over and above the ravages of colonialism, a wasp’s nest of problems that was to plague African nations long after they achieved independence. Boundary lines between colonies were often drawn arbitrarily, with little or no attention to ethnic unity, regional economic ties, tribal migratory patterns, or even natural boundaries.

Before the race for partition, only three European powers—France, Portugal, and Britain—had territory in tropical Africa, located mainly in [West Africa](https://www.britannica.com/topic/history-of-western-Africa). Only [France](https://www.britannica.com/place/France) had moved into the interior along the [Sénégal River](https://www.britannica.com/place/Senegal-River). The other French colonies or spheres of influence were located along the [Ivory Coast](https://www.britannica.com/place/Cote-dIvoire) and in [Dahomey](https://www.britannica.com/place/Benin) (now Benin) and Gabon. Portugal held on to some coastal points in Angola, Mozambique (Moçambique), and [Portuguese Guinea](https://www.britannica.com/place/Guinea-Bissau) (now Guinea-Bissau). While Great Britain had a virtual [protectorate](https://www.britannica.com/topic/protectorate-international-relations) over Zanzibar in East Africa, its actual possessions were on the west coast in the Gambia, the Gold Coast, the [Sierra Leone](https://www.britannica.com/place/Sierra-Leone), all of them surrounded by African states that had enough organization and military strength to make the British hesitate about further expansion. Meanwhile, the ground for eventual occupation of the interior of tropical Africa was being prepared by explorers, missionaries, and traders. But such penetration remained [tenuous](https://www.merriam-webster.com/dictionary/tenuous) until the construction of railroads and the arrival of steamships on navigable waterways made it [feasible](https://www.merriam-webster.com/dictionary/feasible) for European merchants to dominate the trade of the interior and for European governments to consolidate conquests.

Once conditions were ripe for the introduction of railroads and steamships in West Africa, tensions between the English and French increased as each country tried to extend its sphere of influence. As customs duties, the prime source of colonial revenue, could be evaded in uncontrolled ports, both powers began to stretch their coastal frontiers, and overlapping claims and disputes soon arose. The commercial penetration of the interior created additional rivalry and set off a [chain reaction](https://www.britannica.com/science/chain-reaction). The drive for [exclusive](https://www.merriam-webster.com/dictionary/exclusive) control over interior areas intensified in response to both economic competition and the need for protection from African states resisting foreign intrusion. This drive for African possessions was intensified by the new entrants to the colonial race who felt menaced by the possibility of being completely locked out.

Perhaps the most important stimulants to the scramble for colonies south of the Sahara were the opening up of the [Congo River](https://www.britannica.com/place/Congo-River) basin by Belgium’s king [Leopold II](https://www.britannica.com/biography/Leopold-II-king-of-Belgium) and Germany’s energetic annexationist activities on both the east and west coasts. As the dash for territory began to accelerate, 15 nations [convened](https://www.merriam-webster.com/dictionary/convened) in Berlin in 1884 for the [West African Conference](https://www.britannica.com/event/Berlin-West-Africa-Conference), which, however, merely set ground rules for the ensuing intensified scramble for colonies. It also recognized the [Congo Free State](https://www.britannica.com/place/Congo-Free-State) (now Congo [Kinshasa]) ruled by King Leopold, while insisting that the rivers in the Congo basin be open to [free trade](https://www.britannica.com/topic/free-trade). From his base in the Congo, the king subsequently took over mineral-rich Katanga region, transferring both territories to Belgium in 1908.

In West Africa, Germany concentrated on consolidating its possessions of Togoland and Cameroon (Kamerun), while England and France pushed northward and eastward from their bases: England concentrated on the [Niger](https://www.britannica.com/place/Niger) region, the centre of its commercial activity, while France aimed at joining its possessions at [Lake Chad](https://www.britannica.com/place/Lake-Chad) within a grand design for an [empire](https://www.britannica.com/topic/empire-political-science) of [contiguous](https://www.merriam-webster.com/dictionary/contiguous) territories from Algeria to the Congo. Final boundaries were arrived at after the British had defeated, among others, the Ashanti, the Fanti Confederation, the Opobo kingdom, and the Fulani; and the French won wars against the Fon kingdom, the Tuareg, the Mandingo, and other resisting tribes. The boundaries determined by conquest and agreement between the conquerors gave France the lion’s share: in addition to the extension of its former coastal possessions, France acquired [French West Africa](https://www.britannica.com/place/French-West-Africa) and [French Equatorial Africa](https://www.britannica.com/place/French-Equatorial-Africa), while [Britain](https://www.britannica.com/place/Great-Britain-island-Europe) carved out its Nigerian colony.

In southern Africa, the intercolonial rivalries chiefly involved the British, the Portuguese, the [South African Republic](https://www.britannica.com/place/South-African-Republic) of the Transvaal, the British-backed Cape Colony, and the Germans. The acquisitive drive was enormously stimulated by dreams of wealth generated by the discovery of diamonds in [Griqualand West](https://www.britannica.com/place/Griqualand-West) and gold in Matabeleland. Encouraged by these discoveries, [Cecil Rhodes](https://www.britannica.com/biography/Cecil-Rhodes) (heading the British [South Africa](https://www.britannica.com/place/South-Africa) Company) and other [entrepreneurs](https://www.merriam-webster.com/dictionary/entrepreneurs) expected to find gold, copper, and diamonds in the regions surrounding the Transvaal, among them Bechuanaland, Matabeleland, Mashonaland, and Trans-Zambezia. In the ensuing struggle, which involved the conquest of the Nbele and Shona peoples, Britain obtained control over Bechuanaland and, through the [British South Africa Company](https://www.britannica.com/topic/British-South-Africa-Company), over the areas later designated as the Rhodesias and Nyasaland. At the same time, Portugal moved inland to seize control over the colony of Mozambique. It was clearly the rivalries of stronger powers, especially the concern of Germany and France over the extension of British rule in southern Africa, that enabled a weak Portugal to have its way in Angola and Mozambique.

The boundary lines in [East Africa](https://www.britannica.com/topic/history-of-eastern-Africa) were arrived at largely in settlements between Britain and Germany, the two chief rivals in that region. Zanzibar and the future Tanganyika were divided in the Anglo-German treaty of 1890: Britain obtained the future Uganda and recognition of its paramount interest in Zanzibar and Pemba in exchange for ceding the strategic [North Sea](https://www.britannica.com/place/North-Sea) island of Heligoland (Helgoland) and noninterference in Germany’s acquisitions in Tanganyika, Rwanda, and Urundi. Britain began to build an East African railroad to the coast, establishing the East African Protectorate (later Kenya) over the area where the railroad was to be built.

Rivalry in northeastern Africa between the French and British was based on domination of the upper end of the Nile. Italy had established itself at two ends of [Ethiopia](https://www.britannica.com/topic/history-of-Ethiopia), in an area on the [Red Sea](https://www.britannica.com/place/Red-Sea) that the Italians called Eritrea and in [Italian Somaliland](https://www.britannica.com/place/Italian-Somaliland) along the [Indian Ocean](https://www.britannica.com/place/Indian-Ocean). Italy’s inland thrust led to war with Ethiopia and defeat at the hands of the Ethiopians at [Adwa](https://www.britannica.com/event/Battle-of-Adwa) in 1896. Ethiopia, surrounded by Italian and British armies, had turned to French advisers. The unique victory by an African state over a European army strengthened French influence in Ethiopia and enabled France to stage military expeditions from Ethiopia as well as from the Congo in order to establish footholds on the Upper Nile. The resulting race between British and French armies ended in a confrontation at [Fashoda](https://www.britannica.com/event/Fashoda-Incident) in 1898, with the British army in the stronger position. War was narrowly avoided in a settlement that completed the partition of the region: eastern Sudan was to be ruled jointly by Britain and Egypt, while France was to have the remaining Sudan from the Congo and Lake Chad to Darfur.

Germany’s entrance into southern Africa through occupation and conquest of [South West Africa](https://www.britannica.com/place/Namibia) touched off an upsurge of British colonial activity in that area, notably the separation of Basutoland (Lesotho) as a crown colony from the [Cape Colony](https://www.britannica.com/place/Cape-Colony) and the annexation of Zululand. As a consequence of the [South African (Boer) War](https://www.britannica.com/event/South-African-War) (1899–1902) Britain obtained [sovereignty](https://www.merriam-webster.com/dictionary/sovereignty) over the Transvaal and the Afrikaner [Orange Free State](https://www.britannica.com/place/Orange-Free-State).