

Second Edition

INTRODUCTION TO

# INTERNATIONAL DEVELOPMENT

APPROACHES, ACTORS, AND ISSUES

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## CHAPTER 2

# IMPERIALISM AND THE COLONIAL EXPERIENCE

Eric Allina

### LEARNING OBJECTIVES

- ◆ To understand the causes for imperial expansion.
- ◆ To learn about the strategies indigenous rulers followed in their engagement with European empires.
- ◆ To appreciate the important consequences of colonial rule for indigenous societies.

*'He was a sugar planter or something. Wasn't that it, Manuel?'*

*'Yes madam. He was sugar. He was sugar, wine, sugar brandy, coal, sardines, water, everything. . . . He took the water from the people and sold it back again.'*

*'You mean he developed the country.'*

H.E. Bates, *Summer in Salandar*

From 'First and Third World', to 'centre and periphery', to 'developed and developing', we have now arrived at 'Global North and South' to describe the world's uneven distribution of political and financial capital. Each of these paired terms has a history, and as much as the compass-oriented labels now in vogue strive to elide that history, they cannot, if only because some parts of the 'South' lie an inconvenient distance north of the equator, just as some parts of the 'North' are inexplicably located south of the equator. What each pair unsuccessfully attempts to euphemize is a separation of the world along a gradient, a separation whose modern history began with the creation of European empires in what is now known as the 'South'. There are, of

course, exceptions to prove this rule, perhaps none more outstanding than the United States, a world superpower for much of the twentieth century, a state composed of former British, French, Dutch, Russian, and Spanish colonies.

We might trace the history of interaction between this Global North and South back to the fifteenth-century explorations, led by the Portuguese and the Spanish, that gave rise to European expansion into the Americas and Asia. Yet the 'age of exploration', as it has sometimes been called, is something of a misnomer: by the time Portuguese sailor Vasco da Gama's sea voyage in 1497–9 turned Europe's contact with Asia into one of regular (if not rapid) exchange, people, goods, and ideas had been travelling along the great Central Asian highway known as the 'silk road' for centuries. Europeans besides Marco Polo had made the trip east, and Chinese and other inhabitants of Asia had gone west. This very long history of interaction was one reason that da Gama knew of his destination in advance: the world he entered was known to those who lived in it, if not to him (Newitt, 2005: 2–3). Such earlier interactions notwithstanding, most exchange between Europe

and Asia had taken place through intermediaries, with merchants and traders all along the southern and eastern portions of the Mediterranean Sea marketing Asian and African products to European consumers. Previously, only the rare traveller moved from one sphere into the other, but such movement now became more routine.

## EUROPEAN EXPANSION AND CONQUEST

Southern Europe's interactions with largely Muslim traders were an important factor in Portuguese and Spanish decisions to embark on the seafaring explorations that led to Europe's more direct contact with a wider world. The kingdoms of Portugal and Spain had only been established following the thirteenth-century

military reconquest of the Iberian Peninsula, territory the Christian rulers had seized from its Muslim occupants. This foundational conflict was one impulse that led the Spanish and Portuguese to confront their North African neighbours. Accordingly, in 1415 Portuguese forces invaded Ceuta, a city whose wealth made it known to the Portuguese as the 'flower of all other cities of Africa' (Diffie and Winius, 1977: 53). The assault was successful, and following their conquest and occupation of the city, the Portuguese learned more about the sources of its great wealth, such as its access to a gold trade that came from points south of the Sahara northwards into the Mediterranean world. The motives for expansion were thus at once political-religious, born of a competitive tension with Muslim neighbours, and economic, owing to ambitious Europeans' desire for more direct access to goods—not only gold but spices and textiles as well, much sought after

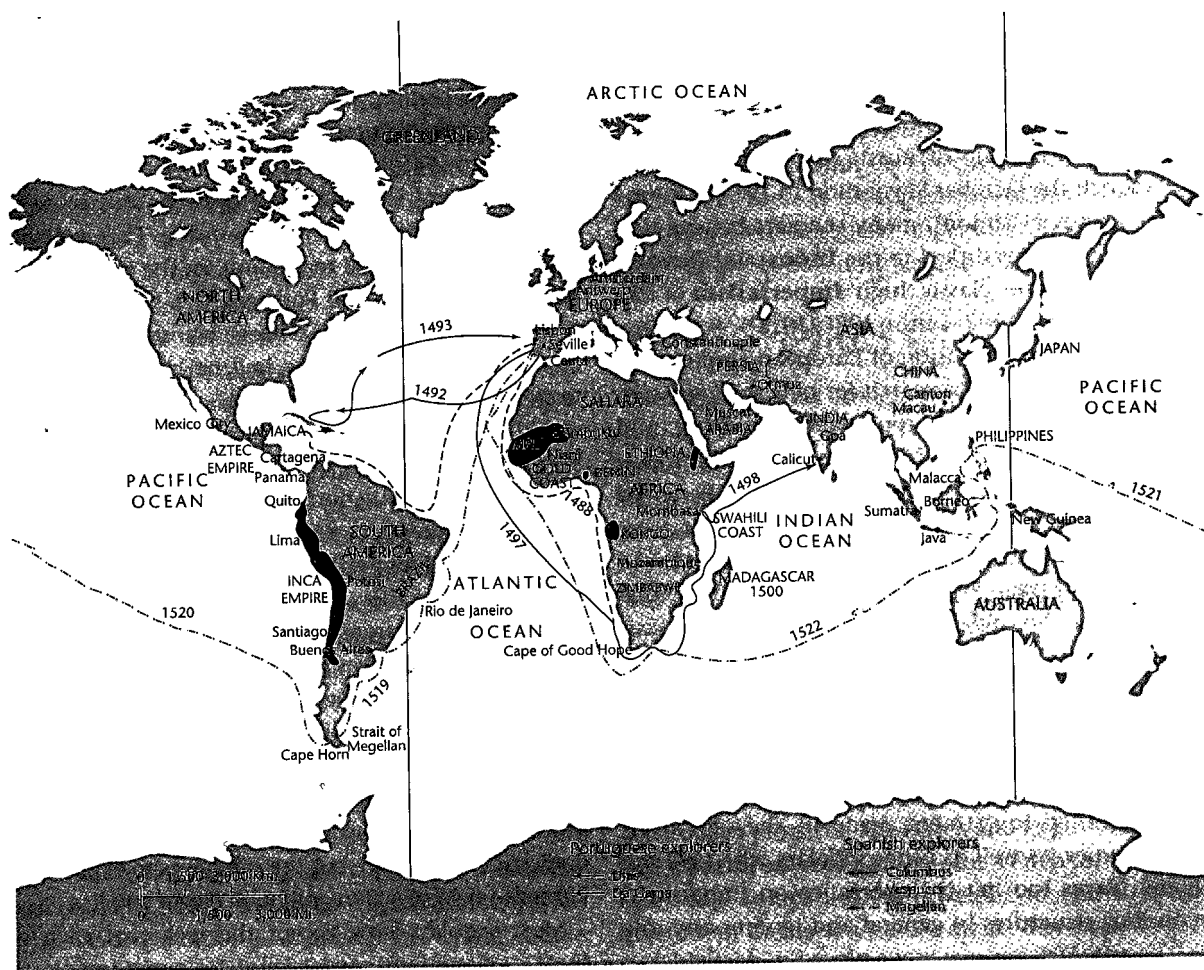


FIGURE 2.1 European Exploration, 1420–1542

Source: Richard W. Bulliet et al., *The Earth and Its Peoples: A Global History*, 3rd edn (Boston: Houghton Mifflin, 2005), 427

in Europe's growing towns and cities, now beginning to recover from the ravages of the Black Death.

The desire for more direct trade with African and Asian societies, eliminating Muslim middlemen, was fulfilled in the vast seaborne expansion during the sixteenth century. Spain and Portugal established their previously unplanned presence in the Americas and created footholds in Africa and Asia. They were soon joined by the French, the English, and the Dutch, leading to several centuries of expansion, occupation, and competition among the European empire-builders for control over these far-flung sources of wealth, power, and glory. Over the next three centuries, the Spanish, French, Portuguese, and British founded—and mostly lost—vast colonial possessions in the Americas, while their holdings in Africa and Asia only grew.

If there is consensus on the motives for Europe's initial phase of expansion, the same cannot be said for the final burst of conquest and occupation towards the end of the nineteenth century. Following an interpretation offered by English scholar John Hobson and also strongly associated with Vladimir Lenin (the Russian revolutionary and theorist who helped end the rule of Russia's Romanov dynasty and launch the October Revolution in 1917, bringing forth the Soviet Union), many scholars believe that economic motives linked to the **Industrial Revolution** launched the classic 'high' imperialism of this period (Hobson, 1902; Lenin, 1920 [1916]). According to this view, the expansion of European empires was undertaken as part of a search for new markets: economic returns within Europe were dwindling, and industrial capitalism had to search abroad for new investment opportunities and consumers. Renewed expansion and the creation of new colonies were thus necessary, because most of Europe still practised protectionist trade policies. This economic explanation offers an appealing logic, and the emphasis on the role of capitalism dovetails neatly with the eventual exploitation, most especially of African labour, that followed during the era of high imperialism. The Hobson–Lenin thesis nonetheless has its critics, among them economic historians who point to the limited investment made in the new overseas colonies, as well as other scholars who find the model places too much importance on impersonal economic structures in general and ignores any role Asians and Africans may have played in particular.

Another approach also focuses on Europe but combines political and economic factors to explain the

rapid expansion of empire. According to this view, 'Great Power' rivalry, most especially among Britain, France, and Germany, drove Europe's statesmen in a rush to seize territories as yet unclaimed in Southeast Asia and Africa. European leaders saw the opportunity to expand as part of a zero-sum game, and in light of the tensions and rivalries that existed in crowded Europe, none were content to wait while any of their neighbours moved ahead, especially after the discovery of diamonds (1867) and gold (1886) in South Africa. Although a desire to secure access to strategically important industrial inputs, such as rubber, or to gain control over areas long believed to possess great riches, such as parts of tropical Africa, was not irrelevant, this understanding emphasizes the imperial powers' race to keep pace with their neighbours.

Associated with the Great Power explanation is the belief in the important role played by nationalist sentiment, which flourished at the end of the nineteenth century. Thus, the emergence of Germany and Italy as unified states was a key factor, especially for France, an older imperial power now concerned with its German neighbour's new expansionary activity. Nearly all of Europe's nations, however, were preoccupied with attaining the degree of prestige and sense of greatness they believed was their due. This explanation is often deployed to account for the outsized role played by Belgium and Portugal, two small and relatively minor European powers whose involvement in the 'scramble for Africa' had no clear connection to political or economic interests, yet both countries ended up with vast African colonies.<sup>1</sup>

What none of these explanations include, however, is much room for the actions of what some historians call the 'men on the spot', a term most common in studies of the British Empire though just as useful elsewhere. These men—for they were all men—often made decisions to expand European activity and territorial claims even when such moves (and the means by which they were achieved) went beyond or even ran counter to official metropolitan policy. Reacting to local crises or opportunities amid a wider atmosphere of tension and transformation, their improvisations may have had little immediate connection to industrial capitalism or domestic nationalism, but the effect was to expand the European field of action and build bigger empires.

Most scholars now accept the idea that each of these explanations can account for some important part of the history of empire-building. Although some may long for a theory that might explain all imperial

expansion in the final third of the nineteenth century, the staggeringly far-flung extent of these endeavours, encompassing such very different parts of the world with accordingly different political and economic conditions, defies any such attempt short of writing a 'total history' (Sanderson, 1974; Kennedy, 1977).

The debates over the causes of imperialism or **colonialism** are unfortunately matched by lack of consensus over just what either of the two terms may be said to mean. In common usage, 'imperialism' refers to the era of European expansion that began in the sixteenth century, when first the Portuguese and the Spanish and then the English, French, and Dutch created empires of trade in the Americas and Asia and, to a lesser extent, Africa. African territory did not, for the most part, come under imperial control or witness **colonization** (outside of Algeria and South Africa) until the last quarter of the nineteenth century; some scholars target in particular the period from 1870 to 1914 as the era of 'high imperialism'. The word 'imperialism' itself first came into use in the late nineteenth century, when it referred to the operation of Britain's empire: a political system by which colonies are ruled from a central seat of power in the pursuit of largely if not entirely economic goals (Williams, 1983: 159). This meaning of 'imperialism' neatly describes some of the earlier European empires (such as the Spanish, English, or French territories of the Caribbean and the Americas) as well as those that covered Africa and good parts of South and Southeast Asia from the last quarter of the nineteenth century through the mid-twentieth century.

Another meaning of 'imperialism', however, casts it not as a political system but as an economic one in which a state pursues 'external investment and penetration of markets and sources of raw materials' (ibid., 159–60). This idea of imperialism is closely associated with the concept of **neo-colonialism**, by which the economies of formally independent countries remain subject to the control of others, often their former colonial rulers. Such a system, of course, may continue past the formal end of colonial rule, with the former imperial power continuing to exert strong control over a nominally independent ex-colony. In some uses, prior colonization is not considered necessary, such as might be the case when imperialism is applied to the involvement of the United States in the Middle East since the mid-twentieth century or of China's increasing influence in sub-Saharan Africa since the turn of the twenty-first century.

Colonization, in the sense of settling and occupying a specified territory, can refer to other contexts as well. Some scholars of early African history, for example, consider the expansion of African societies into unpopulated or sparsely populated areas as a process of colonization. Similarly, most evidence suggests that the earliest human societies in Madagascar were established by colonists who travelled to the island from Southeast Asia. However, neither of these instances of distant settlement took place as part of an imperial expansion or resulted in ongoing political or economic links between the society of origin and the society of settlement. The foundation of a colony may simply indicate the displacement and resettling of a population; colonialism implies the rule of some people over others (Cooper, 2006: 28).

The relationship of imperialism and colonial rule with development has drawn great interest from scholars, politicians, and policy-makers alike, and many have sought to explain how European imperial expansion led to or prevented development in those areas of the world now considered to be developing countries. Few would question that colonial rule had an impact on economic development in colonized territories, but there is no consensus on just what kind of development European imperialism (and colonialism) brought about in Africa, the Americas, and Asia.

## RIVAL EMPIRES OF TRADE

Ventures to the east brought Europeans into a crowded arena that joined together several regions, each one washed by the Indian Ocean. Local and regional trading networks had long linked South Asia to peninsular and insular Southeast Asia and to the Arabian and Red Sea regions and the coast of East Africa to the west. After the Portuguese arrival in South Asia in 1498, Europe soon established a permanent presence with Lisbon's conquest of Goa, an urban trading centre on present-day India's western coast, in 1510. The English, Dutch, and French quickly joined the expansion into Indian Ocean waters, all hoping to dislodge the Portuguese from the position of dominance they had seized as European pioneers. The Dutch and English soon created **chartered companies**—the Dutch and English East India companies—in an effort to enlist private investment in the service of empire. The English East India Company, established in 1600, was followed 70 years later in British North America with the formation of the Hudson's Bay Company, which had effective



**PHOTO 2.1** Troops from German East Africa (present-day Tanzania), before 1919.

Source: Northwestern University Library, Melville J. Herskovits Library of African Studies, The Winterton Collection of East African Photographs: 1860–1960

control over all the lands draining into Hudson Bay. The French organized similar companies, in North America and the Far East, in an effort to compete, while the Portuguese Crown retained more direct control over its eastern empire. The recruitment of private capital by the English and Dutch proved a shrewd decision, for it broadened the financial base for expansionary activity and provided a sturdier platform that better withstood the cut and thrust of imperial rivalries.

Out of this seaborne scrum, the rivals began to carve out areas of influence: the Dutch soon assumed a dominant position in the spice trade out of the Southeast Asian islands (present-day Indonesia and Malaysia), leading the English East India Company to concentrate on the South Asian subcontinent. The French competed with the British on South Asia's east coast, while the Portuguese clung to their base on the west coast. The various European powers sought openings overseen by the Mughal emperors, the recently risen

rulers of the South Asian subcontinent. The Mughals welcomed the outsiders' rivalry because the emperor could capitalize on the competition among them to demand better terms of trade, reversing the trend that had prevailed during the first decades of Portuguese monopoly, when the newcomers had been able to impose trade terms less favourable to them.

The 'new' world that Europeans entered in the Americas differed greatly from the one they encountered in Asia. In Central and South America, European arrival and the labour practices imposed on conquered Amerindian societies produced a staggering population collapse, making any continuation of existing political systems a near impossibility. European sailors and explorers carried smallpox to the Americas; the indigenous peoples of the Americas had no prior exposure and virtually no resistance to the virus. The disease laid waste to the previously populous societies of Meso-America. Alongside this unintended biological

assault, the Spanish, in their eagerness to acquire as much silver and gold bullion as possible from their rapidly growing empire, enslaved indigenous people by the thousands and worked them to death mining gold and silver. In some places, such as the island of Hispaniola (present-day Haiti and Dominican Republic), the death toll resulted in near extinction: the indigenous Taino people numbered at least one million (and perhaps as many as five million) in 1492 but by 1550 had disappeared. In present-day Mexico, the Aztec state collapsed as the population plummeted from perhaps 25 million in 1518 to just over a million in 1605 (Watts, 1999: 84–90). No political institution could survive this degree of social destruction, and that fact ensured that any political system that might be created in New World empires would be cut from whole cloth.

Imperial expansion, especially in Spain's New World possessions, brought an unimagined wealth to the Iberian *conquistadores*. The captured Inca ruler Atahualpa, for example, offered his Spanish captors a ransom of 6,000 kilograms of gold and 12,000 of silver. (The Spanish eagerly took the ransom but instead of granting Atahualpa his freedom only gave him a choice between being burned at the stake and being baptized, then strangled, as a believer in Christ. He chose baptism and strangulation.) The prospect of such immense wealth, together with the decimation of Amerindian societies, resulted in greater immigration to the Americas than to other imperial possessions. Spanish colonists sought their fortunes in gold and silver mining and wielded great power, staffing the viceroalties of Peru and New Spain, as the Spanish territories were called. The large numbers and eventual strength of this colonial elite led to broad tensions with the Spanish Crown, which recognized the potential threat they posed to ongoing imperial control.

Meanwhile, along with gold diggers, the Portuguese introduced the cultivation and export of sugar, which they had pioneered on the Atlantic islands of Madeira and the Azores. Sugar production—and an important product thereof, rum—flourished in Brazil and especially on the Caribbean islands, becoming a major item in the so-called triangular trade with Europe and Africa. From the later 1600s, export of African slaves to the Americas grew enormously, largely to supply labour for sugar (and later cotton and tobacco) production. The elimination of the Amerindian population was a major factor in Europeans' decision to purchase millions of African slaves and export them to the Americas, although the ability of European

merchants to purchase slaves in Africa in exchange for relatively low-cost manufactured goods was also important. Towards the end of the seventeenth century, this forced African migration far outstripped European settlement, and colonial masters depended mightily on their black slaves, who built the foundations of the New World colonies and ensured their economic growth for centuries to come.

In contrast to Meso-America, South America, and the Caribbean, South Asian polities remained robust in early and ongoing interactions with agents of European empire, both in defence of local sovereignty and in pursuit of economic interest. To a certain extent, agents of European empire were compelled to accept terms dictated by the Mughal emperor: as much as the Europeans held sway at sea—for the Mughals had no navy or merchant fleet—Indian rulers accepted no challenge to their dominance on land, strictly limiting the outsiders' rights even to self-defence. Unlike the situation in the Americas; Europeans arrived in Asia with no significant advantage in military technology, and local armies were more than their match. Technology alone, however, was not the critical factor of difference between the Americas and Asia. As noted above, the decimation by disease of indigenous populations in the Americas made European conquest relatively simple. Even more important, many Amerindian groups—especially those that had not formed hierarchical city-states, had a communitarian ethos and culture, which led at first to their sharing with and helping the European newcomers, and their often non-sedentary lifestyle and community organization led the Europeans to believe the Amerindians were 'uncivilized'. Such a Eurocentric assumption was not possible in South Asia.

The greater the number of European firms angling for access to Indian markets, the stronger the Indian negotiating position. The question of competition would come to be of great strategic importance in future years: as Mughal power began to fade around the turn of the eighteenth century, the British and French sought to expand their influence with the regionally based successor states that emerged. Through the first several decades of the eighteenth century, European trading companies found that by allying with and even fighting on behalf of the rulers of Indian states, they could secure valuable concessions, such as duty-free export rights, that could boost their profits significantly.

Through the middle of the eighteenth century, France and Britain vied for dominance in South Asia



as in Europe and the Americas. Britain topped her rival in Asia, especially after the English East India Company gained control of Bengal province in 1765. Exploiting rivalries within Bengal's political and commercial elites, the Company defeated the Mughal armies, and although Bengal remained part of the Mughal empire on paper, the Company emerged as the real power in eastern India. The province was one of India's most economically productive, and the Company now held the rights to Bengal's revenue as well as free rein to trade there. As much as it was a significant political evolution, this development also marked an important turning point in the economic

history of imperial activity. Previously, the Company had financed its purchase of Indian exports with gold bullion, but with rights to locally raised tax revenues, its operations were now locally financed. Thanks to its military adventures, the Company now exercised an economic dominance as well and could rely on its ability to raise local revenue to fund its military actions, a practice known as 'military fiscalism'.

From this point forward, the English East India Company became a virtual juggernaut; although it ruled only a part of India directly, it wielded great influence over a much wider area through alliances with the princely rulers of individual states. With

## IMPORTANT CONCEPTS BOX 2.1

### AN 'ORIENTAL DESPOT': BRITISH COMPANY RULE IN SOUTH ASIA

Queen Elizabeth I's government created the English East India Company in 1600, granting it extensive powers and a measure of autonomy from the state. At the same time, the English state devolved the burden of raising capital and the inevitable risk of the distant undertaking to private investors. With a monopoly on British trade with Asia and the right to arm its trading fleet, the Company possessed the economic and coercive force that would make it the most powerful actor in European imperial history.

For most of its first two centuries, the Company jockeyed for position with rival Dutch and French companies. It also vied to create a more secure relationship with Indian rulers who controlled the Company's access to the subcontinent's producers and to consumers. Outlasting its European competitors, whose position weakened in part because of a changing domestic political landscape, the Company, powered by England's early industrialization, was alone in a position to challenge India's princely rulers in the last quarter of the eighteenth century.

Having spent nearly two centuries as a naval or at most a coastal power, the Company expanded throughout South Asia in the late eighteenth century and the first half of the nineteenth century. Despite its new dominance, it continued to recognize the Mughal emperor as a symbol of Indian authority and in individual states left princes on their thrones as figureheads. Doing so meant that the public, visible

face of authority—embodied in the 'magnificence of princely courts [and] the gifting and patronage activities they sustained'—would remain Indian. Behind the throne, the Company's resident officers controlled military forces, negotiated relations with other rulers, and oversaw revenue collection, often seizing vast fortunes for their personal enrichment (Metcalf and Metcalf, 2006: 75). These 'men on the spot', as they became known, had tremendous latitude to make decisions independent of Company policy, which sometimes lagged behind their improvisations.

This indirect rule preserved a veneer of indigenous authority over the reality of Company power and was in keeping with British beliefs that essential cultural differences between South Asian people and Europeans made European-style representative government impossible. The Company (and later the British government, once the British Crown took charge of India following a rebellion in 1857) insisted on governance that represented a rule of law: a commitment to law, rather than the personal rule of a prince or emperor, believed to characterize 'Oriental despotism', was part of the way that the Company justified its writ. Yet in refusing any role for South Asian representation in government and in establishing a legal code that privileged colonizers' rights and interests and those of the wealthy local elite, the English East India Company (and eventually the British colonial state) was the 'Oriental despot' until the end of colonial rule in 1947.

control over Bengal's vast revenues, the Company expanded its military forces, creating a professional army that made it among the most powerful of any in the region. Having squeezed out its European rivals (French influence receded rapidly through the last third of the eighteenth century, and the Dutch East India Company was dissolved in 1795), the Company held a commanding position in its relations with Indian elites—political, financial, and commercial—who saw in the Company a powerful partner that could secure their own interests. For some whose loyalties were locally rooted, the benefits that might come from alliance with the Company were far more important than the consequences of such partnerships for people in other parts of the subcontinent or for the overall balance of power. Absent any broadly shared identity, ambitious individuals in South Asia had no reason to resist the Company's influence if they might profit from its presence.

In tandem with the English East India Company's growing control over territory in South Asia came a more active role in economic life as well. No longer confined to importing and exporting goods, the Company used its influence to begin reshaping the regional economy. Of signal importance was the extensive rail network constructed in the middle of the nineteenth century. Linking the vast hinterland to port cities (and the ports to one another), the railway greatly reduced transport times and costs, transforming the economy. In the process, however, it also laid down in iron rails the features of an underdeveloped economy: an infrastructure suitable for the export of high-bulk, low-value products. It was a missed opportunity to develop closer ties among the subcontinent's different regions and to integrate potentially complementary economic sectors. Instead, the export-oriented network served the Company's interests, and with financing from British investors, the system generated profits that left the country instead of producing revenue that might have been invested locally.

## 'HIGH' IMPERIALISM IN AFRICA

If South Asia's encounter with European imperialism was a case of conquest in slow motion, with the better part of three centuries elapsing between Vasco da Gama's arrival and the English East India Company's emergence as a territorial power, the creation of European colonies in Africa occurred at a breakneck pace by comparison. The last two decades

of the nineteenth century saw Europeans burst forth from scattered coastal enclaves, some of which they had held for centuries, to seize the entire continent, except for Ethiopia. In this era of 'high' imperialism, Africa occupied centre stage, with Belgium, England, France, Germany, Portugal, Italy, and Spain all establishing African colonies, albeit the last two limited to comparatively small territories.

However, Europe's imperial powers felt such ambivalence about the colonial endeavour in Africa that nearly all sought to find a way to draw non-state actors into the process, mostly by granting charters to private companies that undertook many of the initial steps (and sometimes more). Perhaps the most famous of these companies was Cecil Rhodes's British South Africa Company, a vehicle for his continent-sized ambition, which the diamond baron used to seize present-day Zambia and Zimbabwe. But the British also used companies in Kenya (the Imperial British East Africa Company) and Nigeria (the Royal Niger Company), as the Germans did in Tanganyika (the German East Africa Company).

Similarly, the French rented out a wide swath of Central Africa to concessionary companies, and the Belgian government was so uninterested in creating an African empire that King Leopold II on his own pursued a vast private fief in the present-day Democratic Republic of the Congo, parts of which he leased out to private companies in return for a percentage of the profits. (Only in the face of international protest over the abuses committed there was the Belgian state persuaded to take over the territory from Leopold.)

Most of these companies held their state-like powers for only a decade or so before being replaced by formal colonial administrations early in the twentieth century, but they carried out the strategically vital, expensive, and bloody tasks of conquest and construction of basic infrastructure. Rhodes's company lasted longer than most, ceding its powers only in 1923, although it was outlived by two companies Portugal had created in Mozambique in the 1890s, one of which endured until 1929 and the other until 1942.

The first generations of scholarship on the history of colonialism in Africa focused a good deal of attention on perceived differences between British, French, and Portuguese approaches to colonial rule. German rule, being comparatively short-lived,<sup>2</sup> tended to be ignored in these analyses, as was the Italian and Spanish colonial presence, while Belgian rule was similarly



PHOTO 2.2 Cecil Rhodes (centre) in the Matopo Hills, Zimbabwe.

Source: © www.imagesofempire.com

overlooked. The focus on metropolitan differences, largely confined to the realm of formal policy, made much of an apparent difference between British **indirect rule** versus French direct rule. The Portuguese, on the other hand, were judged to have followed a third path, an especially hands-on and, according to some, more violent version of direct rule. Yet conquest across the board was prosecuted with violence, and all colonial rule was backstopped by violence or its threat; the variation in actual practice on the ground owed more to time and place than to the national origin of the colonizer. As one historian noted, indirect rule was associated with Britain 'not so much because the British applied more indirect rule but because they talked about it more than others' (Kiwauka, 1970: 300).

The focus on the European origins of colonial policies misses the important ways in which policies imagined in London or Lisbon were transformed by the challenge of putting them into practice and by the opportunistic nature of many colonial administrators, who seized whatever openings were available in striving to meet their goals. Britain's policy of indirect rule for its African colonies was, in important respects, a

product of failure more than anything else: an inability to break the power of local African rulers in northern Nigeria led the British administrator responsible for the region to declare instead his intention to keep them in place so that he might rule indirectly through them. If there was any genius to the policy, it was in public relations—in making virtue out of failure and proclaiming the result to be official policy (Cooper et al., 2000: 124–5).

Indirect rule in colonial Africa followed closely on the early model the British had established in South Asia. It was perhaps even more in this later case a decision based on practicality. By keeping local rulers in place (or creating them where indigenous authorities proved difficult to identify or co-opt), colonizers saved themselves the difficulty of establishing new forms of authority or the expense of employing large numbers of European administrators. European colonizers found quick profits in only a few parts of the continent, such as South Africa's gold and diamond strikes or the Congo Free State's short-lived rubber boom, and despite an enduring myth that African colonies would turn out to be another El Dorado, the colonizing

## CRITICAL ISSUES BOX 2.2

## THE 'SCRAMBLE FOR AFRICA'

The late nineteenth-century European conquest of Africa is often referred to as the 'scramble for Africa', a phrase that suggests both speed and disorder. On the eve of Africa's partition, European powers had only a handful of colonies on the continent despite having visited and traded with coastal African societies for more than 400 years. When German Chancellor Otto von Bismarck convened the Berlin Conference in late 1884 (with not a single African representative in attendance), the European powers agreed on ground rules for their land grab. Henceforth, a claim to African territory would be commonly recognized if the claimant had established 'effective occupation' of the area. The effect was to accelerate the process, with the scramblers rushing to put 'boots on the ground'. In the resulting flurry of activity, seven European states divided the continent into 40 colonies, leaving only Ethiopia unclaimed or unoccupied, while resistant African leaders clung to a fragile and dwindling independence.

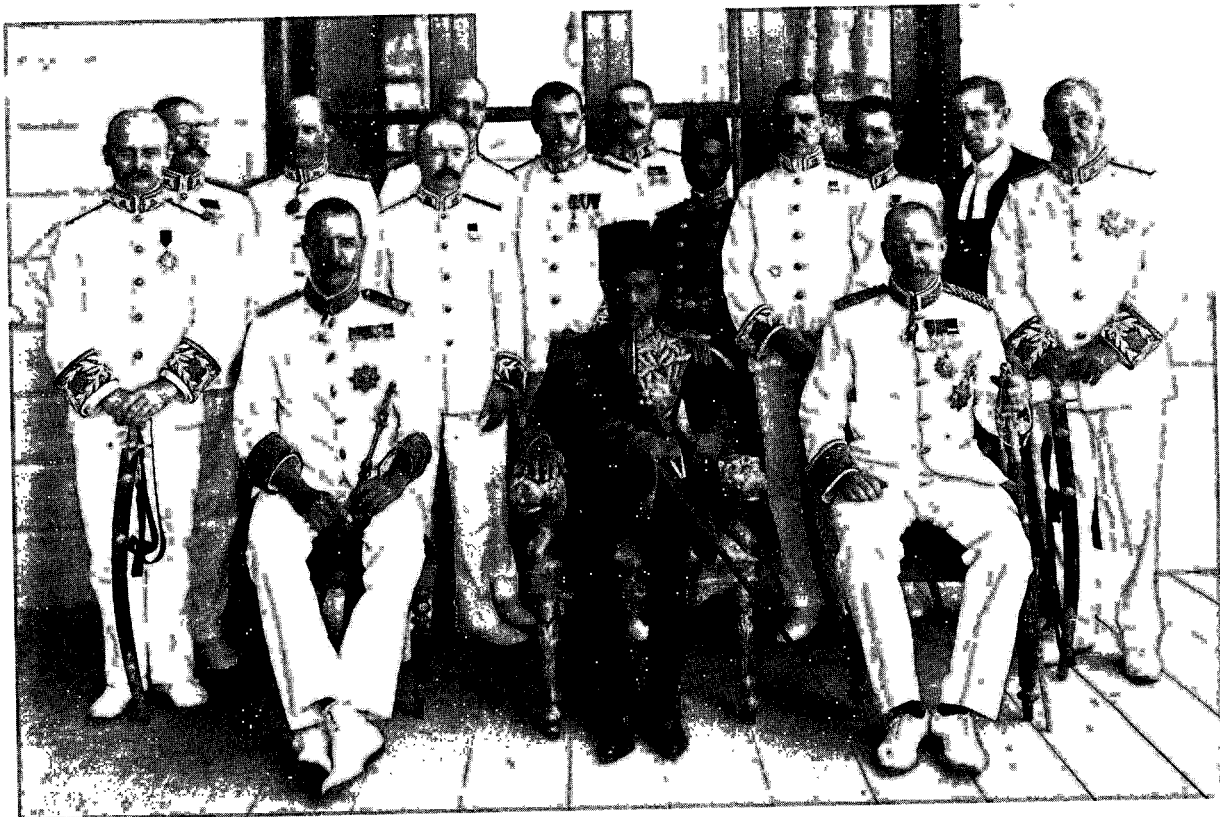
The political and economic topography of late nineteenth-century Africa at the time of partition was markedly uneven. Large African empires with powerful centralized rulers, some controlling long-distance trade in ivory and slaves, existed in most regions of the continent, while smaller independent polities ruled by local authorities were also common. In some areas, notably coastal West and East Africa and their littorals, regional economic networks had grown ever stronger since the abolition of the slave trade earlier in the century, and through these networks, local producers (mostly producers of vegetable products sought by European

industry but also elephant hunters who supplied ivory for growing middle-class consumption overseas) were tied to international commercial networks. With their links to overseas finance, these areas became even more 'extroverted' in their orientation, while other parts of the continent were characterized by locally oriented self-sustaining economies.

In many instances, the European powers inserted themselves into areas fraught with tension, at times born of friction between expanding states and at others resulting from competition over trade. Amid such tensions, African leaders were eager to sign treaties with Europeans, hoping to gain an edge over their neighbours or enemies. In view of these existing divisions, the European powers employed less of a strategy of 'divide and rule', but they were deft in their manipulation of local rivalries. African rulers soon found that after a rival had been subdued or defeated, their erstwhile allies turned on them, now demanding their submission. Standing alone against encroaching European forces, sometimes reinforced by African troops drawn from among those already conquered, remaining African leaders faced a choice between signing treaties that presumed their submission or fighting to remain sovereign. Armed with the Maxim (machine) gun, fortified against malaria with quinine, and more manoeuvrable than ever before with easily assembled (and disassembled) steam-powered flat-bottomed riverboats, the scramblers' forces encountered few opponents who could withstand their attack.

powers were reluctant to invest much or incur ongoing costs in Africa. In much the same fashion that the English East India Company had done in South Asia, colonial administrators sought to identify and codify the 'customary' law that they believed governed African societies; their aim was to rule Africans indirectly through their own laws, enforced by their own leaders, who answered to colonial administrators. If they could incorporate local African rulers at the lower rungs of colonial administration, they could achieve at low cost a dominance that they believed would be viewed legitimately by the African population at large: 'hegemony on a shoestring' (Berry, 1992).

Colonial rule did not affect all colonized people in the same manner. Depending on their position in society, especially their exposure to specific economic or political practices, certain groups of individuals might lose (or gain) material or social capital. The clearest cases of such differential impact occurred with indirect rule, under which many local elites benefited: some helped to collect new tax levies and received a portion for their role, while others, with the tacit support of the colonial state, imposed new burdens on their subjects. But more broadly, the great political and economic changes associated with colonial rule created winners and losers, and some people gained



**PHOTO 2.3** The sultan of Zanzibar, c. 1890s, with British naval officers and colonial officials. Zanzibar, an archipelago off the coast of East Africa, gained its independence in 1963 and joined with Tanganyika in 1964 to become Tanzania.

Source: Northwestern University Library, Melville J. Herskovits Library of African Studies, The Winterton Collection of East African Photographs: 1860–1960

influence over others in the process. The overall effect was to strengthen existing cleavages or to create new ones in indigenous societies, with resulting social tensions. Particularly towards the end of the colonial era (the 1930s and 1940s in Asia and the 1950s in Africa), political constituencies manoeuvred for position as independence approached, and these cleavages—along lines of religion, language, ethnicity, race, and class—became sources of heightened tension and outright conflict, at times very violently so.

## COMMON THEMES IN THE COLONIAL EXPERIENCE

The colonial rule established under imperial systems of government lasted long enough—two centuries or more in South Asia and parts of the Americas, less lengthy in Africa, where some scholars emphasize

the brevity of the colonial era by pegging it at ‘only’ eight decades—to transform indigenous societies in a fundamental manner. The breadth of change wrought in political and economic life was such that it is difficult to address overall in a cohesive fashion.<sup>3</sup> Rather than attempting an encyclopedic coverage, this section focuses on three broad themes that reflect common elements of the colonial experience: European faith in essential cultural differences and in the superiority of European peoples, often used to justify exploitative economic policies and violently abusive governance practices; metropolitan states’ ambivalence regarding the overseas commitments of empire; and a movement, in the twilight years of colonial rule, towards the promotion of economic development in colonial territories.

Late-nineteenth-century imperial boosters rallied others, including sometimes reluctant government ministers, to their cause with claims regarding the inferiority of peoples and cultures outside of Europe. Influenced by

so-called social Darwinist ideas, which had little to do with the evolutionary theory Darwin offered in *On the Origin of Species* in 1859, they applied the idea of evolution not to individual species but instead to human societies. They believed that European peoples represented a more evolved type of human being and human society, while other, darker-skinned people and societies were supposedly examples of still-surviving earlier forms. These beliefs powerfully shaped attitudes towards empire in two ways. First, with Asian or African cultures seen as inferior and even 'primitive', their subordination and even destruction were easily justified in the name of progress. Following on this, because indigenous African or Asian societies were regarded as backward, their transformation, by force if necessary, was judged to be a moral duty of Europeans as the bearers of a higher civilization.

These secular beliefs were prosecuted with a zeal not unlike the longer-standing and persistent spiritual impulse to spread Christianity and 'save' souls from what was believed to be their unhappy heathen fate. The belief in indigenous inferiority was so tightly held that, in its refusal to entertain the possibility that it was not correct, despite plenty of proof to the contrary, it resembled faith. Thomas Macaulay, a senior British official who served in India from the 1830s, exemplified this stance, infamously expressed in his claim that 'the entire native literature of India and Arabia' was not worth 'a single shelf of a good European library'. The claim stands as a hallmark of European chauvinism, all the more remarkable in light of Macaulay's lack of knowledge of any Indian language. He instead was a proponent of anglicization for Britain's Indian subjects, supporting English-language education to create a 'class who may be interpreters between us and the millions we govern; a class of persons Indian in blood and colour but English in tastes, in opinions, in morals, and in intellect' (Metcalf and Metcalf, 2006: 81; Bose and Jalal, 2004: 67).

Imperial expansion did not always occur quickly or decisively, for metropolitan governments were sometimes unsure of the benefits of expansion and leery of taking on new commitments, particularly overseas. Yet once imperial powers committed themselves to acts of colonial conquest—sometimes because they feared they might be outmanoeuvred by a European rival—they prosecuted these wars with maximum force. In the imperial era of the late nineteenth century, particularly in Africa, this meant marshalling the resources of a modern industrial state against opponents nearly always

outmatched in military terms. There were exceptions. One of the most successful cases of indigenous resistance was that of Samori Touré, the ruler of a large state in West Africa, who fought French forces tenaciously for the better part of two decades before succumbing to conquest in 1898. (Ethiopia's successful stand against the Italians, dealing their forces a devastating blow in 1896, is the single case of a European empire defeated in Africa.) Still, even after imperial powers established control over the territories they sought, they remained ambivalent about investing the resources that would have brought the reality of colonial rule into line with the rhetoric of the civilizing mission.

Those who examine colonial attitudes and policies towards indigenous peoples sometimes point to stated differences among French, Portuguese, and British approaches, such as the French intention to assimilate Africans and make them 'black Frenchmen' as opposed to the British commitment to creating 'civilized Africans'. Although formal differences existed among these approaches, all were based on a faith in the superiority of European culture and in the benefit it could bring to African societies. In addition, for most of the period of colonial rule, these policies affected very few people: French 'assimilation' required attainment, for example, of literacy in French, an achievement beyond most people's means, given colonial neglect of African education. Instead, the underlying belief in cultural hierarchy and racial difference was used to justify a wide range of practices whereby indigenous people were forced—sometimes through great violence—to serve Europeans' objectives and needs.

Part of the progress that European powers claimed to be bringing to their colonial territories was a transformation of economic life to the 'modern' level of European economies. What this meant in practice was an overwhelming orientation of African economies towards production of raw materials for export. Mineral extraction—especially of copper, gold, tin, and diamonds—was enormously important in many parts of western, central, and southern Africa, but so were agricultural commodities. Africans produced sugar, cocoa, cotton, peanut oil, and other tropical products to supply European markets, setting the stage for longer-term economic dependencies and vulnerabilities.

The high imperial era looked somewhat different in Latin America. The Spanish colonies and Brazil had won their independence early in the nineteenth century, as local elites had chafed under and eventually

challenged imperial rule successfully. Formal independence did not bring equal status between colonizer and ex-colony, however. For example, Britain and the United States—a new member of the imperial ranks—sought to control trade rather than territory. The British financed a vast expansion of South American rail lines, aiming to seal their access to the continent's large consumer markets for the sale of industrially produced machine goods and textiles and to speed export of agricultural products. Argentina, for example, was able to export great quantities of wool, wheat, and beef, generating important revenue for those who controlled these industries. Such a concentration of primary commodity production, however, along with the neglect of investment in domestic industry, produced structural imbalances and laid a foundation for future weakness (see Chapter 3).

Only comparatively late in the history of colonialism—the early to mid-twentieth century for the most part—did colonizers begin to institute policies that brought significant investment intended to benefit indigenous populations. The field of development, as a professionalized and self-conscious effort to transform economies outside of the industrialized West, dates from this time and still bears some remnants of its origin in the colonial era. In Africa, the end of the 1930s brought what historians used to call the 'second colonial occupation' but is now seen as the emergence of the development era. The shift came amid realization on the part of colonial governments that their past practices had not yielded the expected results. Coercive labour practices—by which hundreds of thousands of Africans were forced to engage in heavy manual labour without pay, a 'modern slavery' that often undermined their ability to support themselves and their families—and heavy-handed unequal treatment did not result in the 'civilized' Africans colonial boosters had promised but rather in an embittered and impoverished population.

World War II, a war in which Africans fought alongside Europeans for the right of European and Asian nations to **self-determination** and freedom from foreign rule, forced a re-examination of the colonial endeavour. Africans increasingly exhibited a new militancy. They refused to remain confined to the narrow grooves cut by the traditional society imagined by colonial rulers, but rather made demands and articulated rights by drawing on metropolitan principles—not only those of self-determination, but also of labour rights.

Part of the colonial response to such actions on the part of colonial subjects was a new approach, at least by Britain and France, to social and economic policy in the colonies. The British passed the Colonial Development and Welfare Act in 1940, and the French established the Investment Fund for Social and Economic Development in 1946. Both expanded the scale of colonial development activities in the post-war period, partly by increasing the flow of funds from the metropole, primarily through loans. Beyond the greater scale of assistance, however, they also changed the nature of colonial efforts to promote economic and social change. The plan for a 'modern future set against a primitive present' was part of an attempt to prolong empire amid growing anti-colonial mobilization; economic development would be the 'antidote to disorder' (Cooper, 1997: 65, 67). Coming at the time it did, the shift did not have a great impact on Britain's or France's closing years of colonial rule in South or Southeast Asia, but it powerfully shaped Africa for the future.

Alongside the growth in scale came an associated increase in the personnel involved: local administrators (who may have improvised on their own initiative, perhaps on the basis of observations of and interactions with the Africans whose lives they administered) were now replaced with a nascent bureaucracy charged with studying, planning, and executing projects conceived to meet priorities set by ministries based in Europe. Colonial intervention in agriculture, forestry, water supply, and livestock was not new, but there was now an emphasis on 'harnessing scientific and technical expertise' to such efforts (van Beusekom and Hodgson, 2000: 31). It was a new approach to an older ideal—delivering modernity to 'natives' who were believed to be incapable of achieving such progress on their own. With the assistance of European experts, indigenous societies and cultures would thus evolve to the norm established by the West. Rather than continuing the mission, spiritual and otherwise, to 'civilize' indigenous societies in accordance with European norms, colonial rule in its final two decades shifted to the 'development' of those societies. In the effort to modernize African economies, the new form of colonial rule took aim not merely at farming techniques or livestock grazing practices but also at the social relations that organized those economic activities. As such, colonial development focused on indigenous social life as much as on economic life, as being in need of modernization.



## CRITICAL ISSUES BOX 2.3

DEVELOPMENT PROJECT AS WHITE ELEPHANT:  
THE OFFICE DU NIGER

The Office du Niger, a sprawling agricultural project planned for the French Soudan (present-day Mali), exemplified the ambition and oversight of colonial development planning. Conceived in the 1920s, the project signalled its outsized aims in the area targeted for development: 18,500 square kilometres, some of which fell within the Niger River's inland delta but much of which lay considerably outside of it. The plan called for the construction of several dams to irrigate vast tracts of land to be planted with cotton and rice. Planners did not speak of making the desert bloom, but their aim was to develop what they saw as underused land on the edge of the Sahara Desert. Yet because much of the area was arid and the population density accordingly low, many of the one million farmers imagined for the project would have to be resettled from elsewhere in French West Africa.

The plan had shortcomings sufficient to doom it from the start, chief among them poor 'expert' knowledge and a yawning gap between the projected objectives and the interests and desires of the Africans expected to participate. Of all the planning shortcomings, perhaps the most astonishing was that the irrigation network—the project's very backbone—provided inadequate or ill-timed water flows in some areas, making successful cultivation nearly impossible. Other problems abounded: some planned villages lacked wells, forcing settlers to collect water from irrigation ditches, while other wells were dry or contaminated (van Beusekom, 2002: 89, 94).

A rejection of African farmers' considerable knowledge and experience was of a piece with the hierarchical nature of the endeavour. Volunteers for resettlement on the project were few; in 1938, one colonial official estimated that 90 per cent of those settled in the villages had been forcibly recruited (*ibid.*). The forced labour recruitment prevalent in the French colonies was quite useful for this purpose, and to secure settlers for the project the Office tapped into the lines of authority that extended down through district-level administrators to local African authorities. Amid the

wider political setting of coercion under colonial rule, it is hardly surprising that most Africans had little interest in the project, where they could expect an especially high degree of surveillance and control.

As with other colonial projects, the plan imagined not only a transformation of African agriculture but also a re-engineering of African social and economic life, changing the way Africans farmed, the structure of their families, and the values that underlay the organization of work and community. In the end, the project fell far short of its goals, whether defined by the area cultivated, the number of settlers, the processes of cultivation, or the crops planted. To the extent that the African settlers on the scheme succeeded in creating a livelihood for themselves, it was owing to their insistence on choosing their own crops, cultivated according to unapproved methods and frequently outside the areas designated for planting. Many others fled the settlement scheme instead, and those who remained, forging their own path, found the freedom to do so after 1946, when France abolished forced labour in its colonies.

In the same way that an earlier generation of colonial policy-makers had aimed to foster cultural transformation and 'evolution' in indigenous societies, in keeping with a belief that the European model presented a natural path to progress, colonial planners now demonstrated faith that an economic makeover would set African societies on a similarly inevitable path. The increasingly advanced degree of political mobilization in post-war African colonies made colonial administrations wary of overly forceful implementation and occasionally responsive to African opposition to some projects. The turn towards development of indigenous societies came at a time when the inevitability of Indian independence was becoming clear, but in Africa, colonial rulers saw development plans in part as a way to return the mercurial genie of nationalist sentiment back into its bottle (Cooper, 1997). Still, the timing was crucial for the future, because the new development approach was bequeathed to a generation of African leaders who were mostly products of colonial education and had



absorbed the associated idea of African 'backwardness'. Science and technology, held to have originated in the industrialized West, were the metric by which economic practices were to be evaluated. Although most post-colonial African leaders embraced African cultural practices, they were also enamoured of scientific knowledge as distinct from local knowledge and were thus skeptical of the practical experience of anyone who lacked a formal education.

The full turn towards development took place in a world divided by the Cold War, with the West—including all the colonial powers—arrayed against the Soviet bloc and its mission of 'exporting revolution'. Some leaders of nationalist independence movements in Africa and Asia sought and received aid, both military and financial, from the Soviet bloc. As anti-colonial mobilization intensified, the colonial

powers reassessed their commitment to political control in their colonies. They questioned the financial benefits and feared the political costs, perceiving that continued denial of self-determination, and the greater oppression it would entail, might drive anti-colonial movements and newly independent states into the arms of the Soviet Union. Fiercely fought anti-colonial wars in Vietnam, Algeria, Cameroon, and Kenya—to name only a few—proved the limits to continued colonial rule. Economic links replaced colonial ministries as the means of influence, and delivering development to colonized peoples was seen as a way to present capitalism and the West in a good light. Looking forward into a post-colonial era, past colonial rulers and a new ally, the United States, sought to maintain the loyalty of former colonies as client states in the Cold War.

## SUMMARY

This chapter has examined the long history of European expansion and conquest into what is now known as the developing world. Although the initial steps, often unplanned, were taken by traders, chartered companies, fortune-seekers, and 'men on the spot', the Industrial Revolution marked the arrival of 'high' imperialism, as the English, French, and Dutch raced to carve out rival empires that circled the globe. Europeans encountered diverse and different societies. In the Americas, the populous empires of the Aztecs and Incas as well as many other indigenous peoples suffered demographic collapse as a result of diseases, especially smallpox, brought by the Europeans. While Africa remained largely

unsettled until the 'scramble for Africa' after 1884, it provided the slaves that powered the plantation economies of the Americas. Throughout the colonial period, imperial powers remained ambivalent about the endeavour and sought to use private chartered companies for expansion, as well as to govern on the cheap through indirect rule. Despite important differences across countries, the colonial experience has played an important role in structuring developing societies in the post-colonial world. Indeed, the first concerns for 'development' emerged as the colonial powers responded to national struggles for self-determination after World War II.

## QUESTIONS FOR CRITICAL THOUGHT

1. What continuities might be identified between economic conditions created under colonial rule and those that prevail today in former colonies?
2. How did colonial policies help to contribute, even if indirectly or unintentionally, to the end of colonial rule?
3. How might present-day conflicts in former colonies be seen as a legacy of specific colonial policies?
4. What colonial-era ideas about indigenous peoples in Africa, Asia, or Latin America are still present in contemporary understandings of the 'Global South'?

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## RELATED WEBSITES

**Digital South Asia Library**  
[dsal.uchicago.edu](http://dsal.uchicago.edu)

**Harappa: The Indus Valley and the Raj in India and Pakistan**  
[www.harappa.com](http://www.harappa.com)

**Around the World in the 1890s: Photographs from the World's Transportation Commission, 1894–1896**  
[memory.loc.gov/ammem/wtc/wtchome.html](http://memory.loc.gov/ammem/wtc/wtchome.html)

**The Atlantic Slave Trade and Slave Life in the Americas: A Visual Record**  
[hitchcock.itc.virginia.edu/slavery/index.php](http://hitchcock.itc.virginia.edu/slavery/index.php)

**Afriterrra, the Cartographic Free Library**  
[www.afriterrra.org](http://www.afriterrra.org)

**United States and Brazil: Expanding Frontiers, Comparing Cultures**  
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**Vistas: Visual Culture in Spanish America**  
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**Gallica Voyages en Afrique (French National Library)**  
[gallica.bnf.fr/dossiers/html/dossiers/VoyagesEnAfrique](http://gallica.bnf.fr/dossiers/html/dossiers/VoyagesEnAfrique)

## NOTES

1. For broad syntheses of the debates about the motivations for the European colonial enterprise, see Sanderson (1974) and Kennedy (1977).
2. Following World War I, Britain and France divided most of Germany's colonies, with Belgium taking Rwanda and Burundi; southwest Africa was something of an

exception, being entrusted to South African rule under a League of Nations mandate.

3. Central Asia is one area of colonial rule outside the context of colonization by Western European powers and is largely absent from comparative scholarship, with the exception of Beissinger and Young (2002). It came under Russian imperial rule in the eighteenth century,

and the Soviet Union later asserted control. Empire and colonial rule thus may flourish in the absence of a capitalist economic system; many of the economic and political outcomes considered characteristic of post-colonial societies are evident in post-Soviet Central Asia.

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