

## LESSON 1

# European Exploration and Expansion

## ESSENTIAL QUESTION

What are the effects of political and economic expansion?

## READING HELPDESK

## Academic Vocabulary

- overseas

## Content Vocabulary

- caravel
- conquistador
- colony

## TAKING NOTES

## Key Ideas and Details

**Summarizing** Use a graphic organizer like this one to identify which European nations and individuals explored which region(s).

Nation	Explorer	Region(s)

## IT MATTERS BECAUSE

*European explorers traveled east and west driven by a variety of motives, including desire for wealth, political ambition, religious zeal, and the call of adventure. These connections between Europe and the rest of the world were crucial to forming the modern world.*

## Motives and Means

**GUIDING QUESTION** *What were the motivations behind European exploration of distant lands?*

For almost a thousand years, most Europeans had remained in their small region of the world. Then, between 1500 and 1800, European explorers used improved sailing ships to travel and explore the rest of the world. First Portugal and Spain, and then later the Netherlands, England, and France, reached to new economic heights through their travels and resulting trading activity. At the end of the fifteenth century, they set out on a remarkable series of **overseas** journeys. What caused them to undertake such dangerous voyages?

European explorers had long been attracted to Asia. In the late thirteenth century, Marco Polo traveled from Venice with his father and uncle to the Chinese court of the great Mongol ruler Kublai Khan (KOO • bluh KAHN). Marco Polo wrote an account of his experiences, entitled *The Travels*. Many Europeans read the book and were fascinated by what they imagined as the exotic East. In the fourteenth century, conquests by the Ottoman Turks reduced the ability of Westerners to travel by land to the East. People then spoke of gaining access to Asia by sea.

Economic motives loom large in European expansion. Merchants, adventurers, and state officials had high hopes of expanding trade, especially for the spices of the East. The spices, which were needed to preserve and flavor food, were very expensive after Arab middlemen shipped them to Europe. Europeans also had hopes of finding precious metals.

It has been said that “Gold, glory, and God” were the key motives for European expansion. This statement suggests another reason for the overseas voyages: religious zeal. Many people shared the belief of Hernán Cortés, the Spanish conqueror of Mexico, that they must ensure that indigenous people were “introduced into and instructed in the holy Catholic Faith.”

Spiritual and secular affairs were connected in the sixteenth century. Many Europeans wanted to convert indigenous people to Christianity, but grandeur, glory, and a spirit of adventure also played a major role in European expansion.

New sailing technology made the voyages of discovery possible. Europeans had now reached a level of ship design that enabled them to make long-distance voyages beyond Europe. The Portuguese invented a ship, called the **caravel**, that was faster than previous models. It made long voyages of exploration possible and lowered the cost of transport. The caravel’s design included a large cargo hold. It used triangular, or lateen, sails, taken from Arab designs, which allowed it to sail against the wind.

European explorers also had more accurate maps because of advances in cartography, the art and science of mapmaking. Sailors used the astrolabe, an invention of Greek astronomers, to plot their latitude using the sun or stars. The magnetic compass, invented in China, also helped sailors chart a course across the ocean.

Another factor assisting European explorers was their increasing knowledge of wind patterns of the Atlantic Ocean. The winds, ocean currents, and climate influenced the journeys of the early sailing vessels that depended on them. The Atlantic, Pacific, and Indian Oceans have spiraling currents, called gyres, that result from global winds and other forces. The winds blowing south and west in the North Atlantic, known as the trade winds, and the winds blowing from the west to the east, known as westerlies, were studied and utilized to the explorers’ benefit.

#### **READING PROGRESS CHECK**

*Explaining* What does the phrase “Gold, glory, and God” mean?

## A Race for Riches

**GUIDING QUESTION** *How were Spain and Portugal able to take the lead in discovering new lands?*

During the fifteenth century, European explorers sailed into the world in new directions. Portuguese ships took the lead when they sailed southward along the West African coast.

### Portuguese Explorers

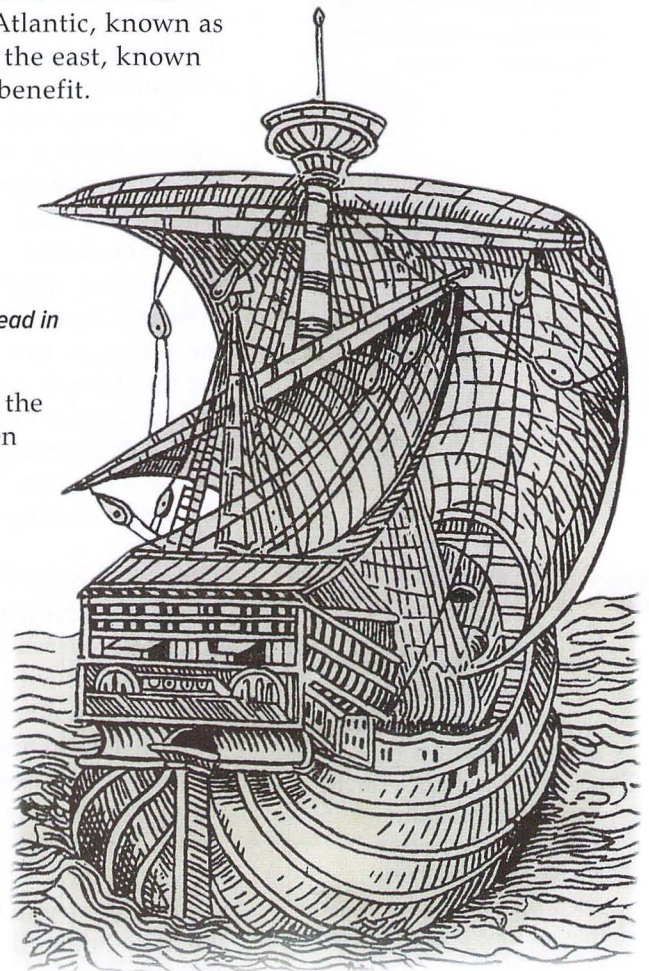
Beginning in 1420, under the sponsorship of Prince Henry the Navigator, Portuguese fleets began probing southward along the western coast of Africa. There, they discovered a new source of gold. The southern coast of West Africa became known to Europeans as the Gold Coast.

Portuguese sea captains heard reports of a route to India around the southern tip of Africa. In 1488 Bartholomeu Dias reached the tip, later called the Cape of Good Hope, and returned. Next, Vasco da Gama went around Africa and cut across the Indian Ocean to the coast of India. In May 1498, he arrived off the port of Calicut. After da Gama returned to

**oversea** beyond or across the sea

**caravel** a small, fast, maneuverable ship that had a large cargo hold and usually three masts with lateen sails

▼ A Portuguese caravel





▲ An engraving from 1592 shows the harbor of Lisbon full of ships coming from and going to Portugal's overseas colonies.

#### ► CRITICAL THINKING

**Analyzing** What does this image suggest about Portugal's role in international trade at the end of the sixteenth century?

Portugal, he made a large profit from the cargo of spices he obtained in India.

Portuguese fleets returned to the area to take control of the spice trade from the Muslims. The Portuguese Admiral Afonso de Albuquerque (AL • buh • KUR • kee) established a port at Goa, India. Later, Albuquerque sailed into Melaka, a thriving spice trade port on the Malay Peninsula. By taking over Melaka, the Portuguese destroyed Arab control of the spice trade and gained a stopping place on the long journey to the Moluccas, then known as the Spice Islands.

A Portuguese treaty signed with the local Moluccan ruler established Portuguese control of the spice trade. The Portuguese had a limited empire of trading posts on the coasts of India and China. They did not have the resources to colonize these regions.

### Spanish Explorers

Educated Europeans knew the world was round but often used faulty formulae to determine its circumference.

They did not know the size of the Asian continent, or that another continent was located to the west between Europe and Asia. While the Portuguese sailed south along the coast of Africa, then east through the Indian Ocean, the Spanish sailed west across the Atlantic Ocean to find the route to Asia.

Christopher Columbus believed he could reach Asia by sailing west instead of east around Africa. Columbus persuaded Queen Isabella of Spain to finance an exploratory expedition. In October 1492, he reached the Americas, where he explored the coastline of Cuba and the island of Hispaniola in the Caribbean.

Columbus believed he had reached Asia. After three voyages, he had still not found a route through the outer islands to what he believed was the Asian mainland. In his four voyages, Columbus reached all the major Caribbean islands and Honduras in Central America—all of which he called the Indies.

Another important explorer funded by Spain was Ferdinand Magellan. In September 1519, he set sail from Spain in search of a sea passage through the Americas. In October 1520, Magellan passed through a waterway along the tip of South America, later called the Strait of Magellan, into the Pacific Ocean. The fleet reached the Philippines, but indigenous people there killed Magellan. Although only one of Magellan's ships returned to Spain, as the leader of the expedition, he is remembered as the first person to sail completely around the globe.

### New Lands to Explore

Spain and Portugal each feared that the other would claim some of its newly discovered territories. They resolved their concerns over control of the Americas with the Treaty of Tordesillas, signed in 1494. The treaty called for a boundary line extending from north to south through the Atlantic Ocean and the easternmost part of the South American continent. Unexplored territories east of the line would be controlled by Portugal, and those west of the line by Spain. This treaty gave Portugal control over its route around Africa, and it gave Spain rights to almost all of the Americas.

Soon, government-sponsored explorers from many European countries joined the race to the Americas. A Venetian seaman, John Cabot, explored the New England coastline of the Americas on behalf of England in 1497. The Portuguese sea captain Pedro Cabral landed in South America in 1500,

## Connections to TODAY

### Mapping Ocean Winds

A contemporary use of ocean winds is to drive wind turbines producing electricity. To harness this resource, scientists first need to identify areas in the oceans that have strong winds, using data from NASA satellites. Then, scientists can prepare maps that indicate potential sites for wind farms.

which established Portugal's claim to the region later named Brazil. Amerigo Vespucci (veh • SPOO • chee), a Florentine, went along on several voyages. His letters describing the lands he saw led to the use of the name America (after Amerigo) for the new lands.

### READING PROGRESS CHECK

**Interpreting** How were the first explorations of Spain and Portugal similar and different?

## The Spanish Empire

**GUIDING QUESTION** *What were the results of Spanish and Portuguese conquests in the Americas?*

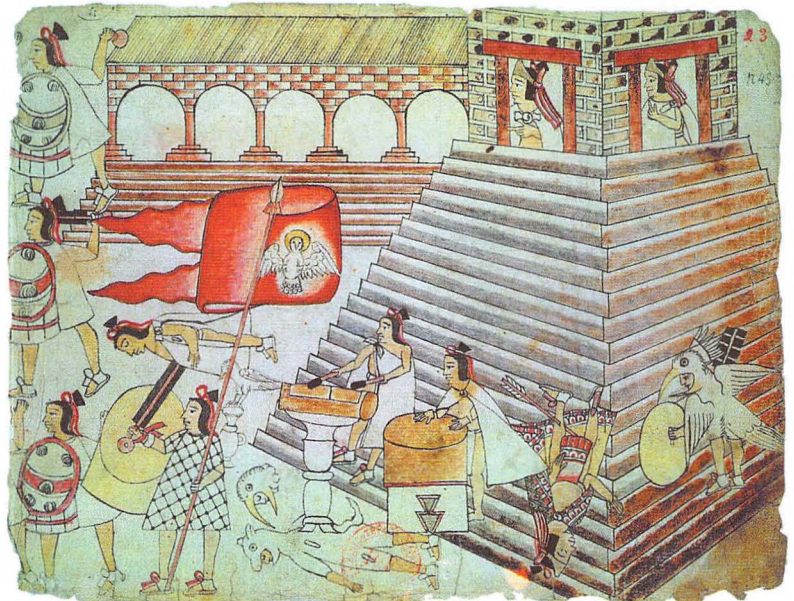
The Spanish conquerors of the Americas—known as **conquistadors**—were individuals whose firearms, organizational skills, and determination brought them extraordinary success. With their resources, the Spanish were able to establish an overseas empire that was quite different from the Portuguese trading posts.

**conquistador** a leader in the Spanish conquest of the Americas

### Conquest of the Aztec

For a century, the Aztec ruled much of central Mexico from the Gulf of Mexico to the Pacific coast. Most local officials accepted the authority of the Aztec king in the capital Tenochtitlán, which was located at the site of modern-day Mexico City.

In 1519 a Spanish force under the command of Hernán Cortés landed at Veracruz, on the Gulf of Mexico. Cortés marched to Tenochtitlán with a small number of troops—550 soldiers and 16 horses—and two translators. As he went, he made alliances with city-states that had tired of the oppressive rule of the Aztec. Particularly important was the alliance with Tlaxcala. In November, Cortés arrived at Tenochtitlán and was welcomed by the Aztec monarch Montezuma II (Moctezuma II). The Aztec were astounded to see the unfamiliar sight of men on horseback with firearms, cannons, and steel swords. These weapons gave the Spaniards a great advantage in fighting the Aztec.



▲ Aztec warriors defending Tenochtitlán against the Spanish

### CRITICAL THINKING

**Drawing Conclusions** How did the differences between Aztec and Spanish methods of waging war affect the outcome of the Spanish invasion?

### PRIMARY SOURCE

“We arrived at a broad causeway, when we saw many towns and villages built in the lake, and other large towns on the land, with the level causeway running in a straight line to [Tenochtitlán]. We were astounded and told one another that the majestic towers and houses, all of massive stone and rising out of the waters, were like enchanted castles we had read of in books. Indeed, some of our men even asked if what we saw was not a dream.”

— Bernal Díaz del Castillo, from *The True History of the Conquest of New Spain*

Eventually, tensions arose between the Spaniards and the Aztec. The Spanish took Montezuma II hostage and began to pillage the city. In the fall of 1520, one year after Cortés had first arrived, the local population revolted and drove the invaders from the city. Many of the Spaniards were killed.

However, the Aztec soon experienced new disasters. With no natural immunity to European diseases, many Aztec fell sick and died, especially from smallpox carried to the Americas by the Spaniards. Meanwhile, Cortés received fresh soldiers from his new allies in city-states such as Tlaxcala. After four months, the Aztec surrendered.

The forces of Cortés leveled pyramids, temples, and palaces and used the stones to build Spanish government buildings and churches. They filled in Aztec canals to make roads. The magnificent city of Tenochtitlán was no more. During the 30 years after the fall of the Aztec Empire, the Spanish expanded their control to all of Mexico.

## Conquest of the Inca

When the first Spanish expeditions arrived in the central Andes of South America, they encountered a flourishing empire ruled by indigenous people, the Inca. In early 1531, Francisco Pizarro landed on the Pacific coast of South America with only a small band of about 180 men. Like Cortés, Pizarro brought steel weapons, gunpowder, and horses. The Inca had never before seen these things.

The Spanish also brought smallpox. Like the Aztec, the Inca had no immunities to European diseases. Smallpox soon devastated entire villages. Even the Inca emperor was a victim.

When the emperor died, both of his sons claimed the throne. This led to a civil war. Taking advantage of the situation, Pizarro captured Atahualpa, the new emperor. With their stones, arrows, and light spears, Inca warriors provided little challenge to Spanish technology.

After executing Atahualpa, Pizarro, his soldiers, and their Inca allies sacked Cuzco, the Inca capital. By 1535, Pizarro had established a new capital at Lima for a new **colony** of the Spanish Empire.

**colony** a settlement of people living in a new territory, linked with the parent country by trade and direct government control

### ✓ READING PROGRESS CHECK

*Comparing and Contrasting* How were the conquests of the Aztec and the Inca similar and different?

## European Rivals

**GUIDING QUESTION** Which other European countries explored and settled in the Americas?

By the end of the sixteenth century, several new European rivals—the Dutch, French, and English—had begun to challenge the Portuguese and the Spanish for colonial dominance. Motivated by the promise of gold and other precious goods, these countries sent explorers to the Americas to search for new sources of wealth and trade opportunities.

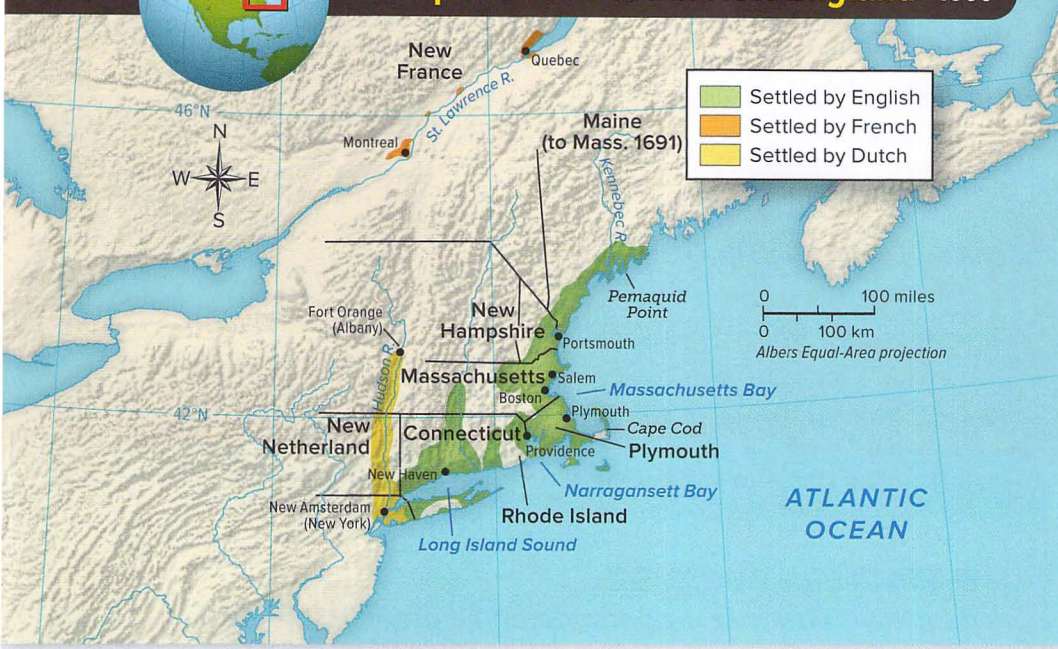
The Dutch formed the West India Company. Although it made some temporary inroads in Portuguese Brazil and the Caribbean, the company lacked the resources and power to maintain these gains.

In the early seventeenth century, Dutch settlements were established on the North American continent and named New Netherland. The colony extended from the mouth of the present-day Hudson River as far north as present-day Albany, New York. This settlement and others never flourished because of the West India Company's commercial goals. Fur trading, with its remote outposts, did not encourage settlement.

After 1660, the Dutch commercial empire in the Americas fell to its rivals, the English and the French. In 1664 the English seized the colony of New Netherland from the Dutch and renamed it New York. The Dutch West India Company soon went bankrupt.



## European Colonies in New England 1660



### GEOGRAPHY CONNECTION

- 1 ENVIRONMENT AND SOCIETY** *On which waterways did the early Dutch and French fur trappers depend?*
- 2 PLACES AND REGIONS** *How did the pattern of English settlement differ from that of the Dutch and the French?*

During the seventeenth century, the French colonized parts of what is now Canada, then named New France, and Louisiana. In 1608 Samuel de Champlain founded Quebec, the first permanent French settlement in the Americas. When New France became a royal province in 1663, with its own governor, military commander, and soldiers, the population grew and the colony developed. Meanwhile, English settlers were founding Virginia and the Massachusetts Bay Colony.

By the end of the seventeenth century, the English had established control over most of the eastern seaboard of North America. They had also set up sugar plantations on several Caribbean islands. Nevertheless, compared to the enormous Spanish empire in Latin America, the North American colonies were of minor importance to the English economy.

### READING PROGRESS CHECK

**Locating** Where were the earliest settlements of the Dutch, French, and English in the Americas?

## LESSON 1 REVIEW

### Reviewing Vocabulary

- 1. Identifying** Write a paragraph explaining why the caravel was an important development for European explorers.

### Using Your Notes

- 2. Summarizing** Use your graphic organizer on European exploration to write a paragraph summarizing the major explorers and the regions each nation explored.

### Answering the Guiding Questions

- 3. Identifying Cause and Effect** What were the motivations behind European exploration of distant lands?
- 4. Making Connections** How were Spain and Portugal able to take the lead in discovering new lands?

- 5. Identifying Cause and Effect** What were the results of Spanish and Portuguese conquests in America?

- 6. Naming** Which other European countries explored and settled in the Americas?

### Writing Activity

- 7. Informative/Explanatory** Write an essay explaining how the Spanish succeeded in conquering much of the Americas. Identify the various factors that enabled them to overthrow such long-standing and extensive empires as the Aztec and the Inca.