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FOR QUEENSLAND 2nd Edition

8

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This digital-only chapter is available in the offline and interactive versions of the book

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Introduction

In a world experiencing population growth, war, pandemic, climate change, issues of environmental sustainability, economic recessions, and the rapid rise of artificial intelligence, the study of Humanities is as relevant and useful as it has ever been. To ensure that we always have people to hold governments and corporations to account and to ensure they act responsibly and ethically in responding to these challenges now and into the future, it is vital that our students develop their abilities to think critically and empathetically about important issues, to consider multiple perspectives and to evaluate possible solutions using sources of evidence and data. Perhaps most importantly, the study of Humanities empowers us to believe that individuals and groups can make a difference and that, as a society, we can overcome challenges together to create a better world.

Developed by a highly experienced team of Humanities subject experts from across Queensland, *Cambridge Humanities and Social Sciences for Queensland 8* has been created specifically for students and teachers in Queensland schools, and features Queensland-based case studies and examples as well as an extensive range of sources, diagrams and datasets. This text is intended to be a valuable and versatile resource both for classroom teaching and independent student research inquiries.

A notable point of difference in this textbook is the deliberate integration of Visible Thinking Routines within each chapter to encourage deeper engagement with key issues and sources. These routines provide opportunities for students to think in different ways and model a range of analytical and critical thinking strategies that students and teachers can use in their classrooms. Chapter questions have been designed around key cognitive verbs, which are clearly highlighted to encourage students to be purposeful and confident in understanding and applying a range of thinking strategies to build their knowledge and understanding of topics. Learning in each chapter is further supported by a suite of extensive digital resources, including model assessment items, suggested responses, additional activities, chapter review quizzes and teacher guides.

The chapters in this textbook encourage students to engage with important issues and questions that have relevance to their own lives today. For example, in History, students will make connections to their own experience of a post-pandemic world through their investigation of the impact of past pandemics on society in medieval Europe. In Geography, students will consider the future issues that their world will face as a consequence of the growth of megacities and a continually increasing world population. In Economics and Business, students will learn about the characteristics and behaviours of successful entrepreneurs, making connections to the qualities that will enable them to be successful in their own lives. In Civics and Citizenship, students will deepen their understanding of the important role each individual citizen plays in our political system and how they, as future voters, have the potential to contribute towards positive changes for a better future.

– Benjamin Hegerty, series author

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About the authors and contributors



Kate Buchanan (*lead author: Geography*) is a Geography and Humanities teacher at her current school. She has worked in Queensland schools for six years and has experience teaching Geography, History and Religion across Years 7–12. Prior to teaching, Kate was an urban planner and demographer. She has experience as a QCAA endorser and confirmer for Geography and as a committee member of the GTAQ. Kate is passionate about the importance of Geography as a discipline to help students understand the world and their place in it.



Jarod Costantini (*lead author: Economics and Business*) is the Director of Staff Development at his current school. He has worked in Queensland schools for over 15 years and has experience in several different areas of leadership alongside teaching classes in Years 9–10 Economics and Business and Year 11 and 12 Economics. Jarod is also an accredited assessor for the Highly Accomplished and Lead Teacher Certification that is recognised across Australia. He has a keen interest in developing an understanding of Economics and Business for the future leaders of our nation.



Kimberley Diehm (*lead author: Civics and Citizenship*) has developed a broad understanding of Humanities curriculum over her 10-year teaching career. She is passionate about delivering engaging Economics and Business and Civics and Citizenship courses from Years 7 to 12, with a specific focus on student-centred learning, authentic case studies and examining contemporary issues. Kimberley is currently undertaking a Master of Business (Management) to continue to cultivate her curriculum and leadership capabilities. She is invested in helping students develop real-world knowledge and skills necessary for rapidly evolving societal, organisational and political landscapes.

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Benjamin Hegerty (*lead author: History*) is a History teacher and Head of Humanities and Social Sciences at his current school in Brisbane. He is an executive member and past Vice-President of the Queensland History Teachers' Association (QHTA) and has contributed to the QCAA in various roles, as the Brisbane Central District Review Panel Chair for Ancient History, QCAA Subject Matter Expert for Ancient History, Lead Endorser and Lead Confirmer. Ben was involved as a contributing author for the Cambridge University Press textbook, *Senior Ancient History for Queensland*, and completed his Master of History through the University of New England. He has presented multiple workshops and seminars on History pedagogy at state and national education conferences.



Richard Leo (*contributing author: Geography*) is a highly experienced educator in History and Geography with over 20 years of experience in both the higher education and secondary school sectors having taught in schools across both South Australia and Queensland. He has published several articles and peer-reviewed book chapters. Richard has lectured in both Education and History at CHC in Brisbane and also acts as an Education Advisor, specialising in intercultural and interfaith pedagogies, for Together for Humanity, an inclusive educational organisation that works with school communities to foster intercultural understanding.



Cameron Martens (*contributing author: History*) is the Head of the Humanities Department at his current school on the Sunshine Coast. Following studies in Law, History and Education at the University of Queensland, he served in the Australian Government here and overseas before returning to a teaching career in English, Modern History and Legal Studies. He is currently a Lead Confirmer and a Lead EA Marker in Modern History for the QCAA.

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Ryan Slavin (*contributing author: History*) has been teaching in the Humanities for over a decade. He has headed Humanities departments and led eLearning and literacy, among other teaching and learning positions, at numerous schools in which he has taught. Ryan has taught History, Geography, English, Legal Studies and Study of Religion to Queensland students from Years 7–12, and English as a Second Language to adults overseas. He has been a member of the Executive for the Queensland History Teachers' Association for many years and is the editor of the Association's eJournal publication. Ryan has written for Cambridge University Press a number of times, including for *Senior Modern History for Queensland* published in 2019. Ryan also has over 20 years of martial arts teaching experience, and manages a traditional Japanese martial arts *dojo* (school) where he lives on Queensland's Sunshine Coast.



About the First Nations advisor

Alison Quin is descended from the Tagalak people of the Gulf Country of far north Queensland. Alison has worked in First Nations education through her career, starting as a high school teacher and moving into community-led education initiatives. Her vision is for all students in Australia to learn about and through the two knowledge traditions of this continent – First Nations and Anglo-Australian – to create a future that respects and empowers this Country and its many peoples.



About the illustrator

Jean-Michel Girard is an illustrator based in Québec City, Canada, who has 30 years' professional experience working around the world. While Jean-Michel is able to work in a wide variety of styles (from hyperrealism to cartoon), he has specialised in historical illustrations as he is a longtime history aficionado. His attention to historical detail is extraordinary. Jean-Michel uses digital tools but with traditional drawing methods.

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About the cover artist



Source: Photo by Mick Richards

Fiona Omeenyo first appeared on the contemporary art scene in the late 1990s as one of the more prominent members of newly established far north Queensland's renowned Lockhart River 'Art Gang'.

'My country Pathacy (Chester River near Coen) that's where my Grandmother is from. My figures are about family and country. I do my painting to carry my culture on and so my children will know our stories.' The artist's figurative compositions connect ancestral spirits with her kin relationships. For the artist, ancestors exist simultaneously with the present-day generation. Accordingly, her themes constantly revolve around bloodline and connectivity. A continuous relationship with past and present is expressed through the artist's sense of line and space (both positive and negative).

About the cover



Fiona Omeenyo *One mob out together* Acrylic on canvas, 72 × 102 cm
This painting by Fiona Omeenyo is called *One mob out together* (2016). This represents the ideas of teaching and family (heritage). This is particularly explored in the History subject within the Humanities and Social Sciences for Queensland series.

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How to use this resource

Book structure

- All chapters have been closely aligned to the Australian Curriculum V.9.0 for Humanities and Social Sciences for Year 8.
- This book contains four parts, with each part covering one of the four topic areas: History, Geography, Economics and Business, and Civics and Citizenship.
- Every chapter starts with an engaging 'Setting the scene' story to help you jump into a new topic, and includes an activity that can be used to spark classroom discussion.
- Each chapter has a 'Chapter overview' which lists 'Learning goals' for the chapter.
- Each chapter is divided into numbered sections, and each of these sections covers content descriptors from the Australian Curriculum.
- Each chapter section starts with 'Focus questions' to drive your inquiries into the Humanities.
- In History, following the inquiry approach, each chapter is constructed around an over-arching key inquiry question and several sub-inquiry questions. The inquiry questions are colour-coded to help students recognise their features:
  - An interrogative
  - A historical concept
  - Specific content
  - Scope and scale.
- In all chapters QR codes are included for easy access to related videos.
- At the end of each section are Developing your understanding questions. The History chapters have Reflecting on your learning questions. At the end of each chapter are End-of-chapter assessment activities.

Activity types

This series uses a range of activity types including the following:

- Developing concepts and skills (activities that scaffold important concepts and skills from the Australian Curriculum)
- Reflecting on your learning and Developing your understanding review questions at the end of each section (questions in both print and digital formats)
- Multiple other activity types, particularly in End-of-chapter activities, that vary from analysing historical visual sources to graph interpretation and map-reading
- Making Thinking Visible activities inspired by the Visible Thinking routines devised by Harvard University's Project Zero group. (A guide to using these activities is available for teachers in the Online Teaching Suite)

Activities cover a range of different learning types and levels.

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Making Thinking Visible activities

In this series, one of the common activity types we have employed is called Making Thinking Visible. These activities are inspired by the Visible Thinking routines devised by Harvard University's Project Zero group.

Visible Thinking routines are engaging classroom activities which challenge students to reflect on, and articulate, their thinking about a prompt or stimulus material. By using the same routines (such as 'See, Think, Wonder'), students develop familiarity and confidence with the rules of the activity. For more information, teachers can visit the Online Teaching Suite or the Project Zero website at https://pz.harvard.edu/thinking-routines.

ACTIVITY 2.23
MAKING THINKING VISIBLE

Think, pair, share

1 Think: Take a minute to **consider** the following question: 'Was life in ancient Egypt fair for all groups?'
2 Pair: Turn to a neighbour and **discuss** your responses to the question. Take turns to speak, listen carefully and ask questions of one another.
3 Share: Share your ideas as a whole class to **create** a list of ideas to respond to this question.

Digital resources

This series uses the interactive Edjin platform, and includes both a student and a teacher edition.

In the **Interactive Textbook** version of this book, students will find the following key resources:

- Images that can be zoomed in on (this is really useful for reviewing any images to analyse at a larger size)
- Interactive Chapter quizzes and Scorcher quizzes (timed, competitive and fun tests of knowledge)
- Videos, image galleries and other multimedia materials, such as zoomable maps
- Additional geographic tools, such as a guide to using topographic maps and a series of skills videos
- Downloadable worksheets for all activities
- Suggested solutions
- Additional content to the print book
- A PDF downloadable version of this student textbook.

In the **Online Teaching Suite**, teachers will find:

- Guidance on using the digital versions of the book
- Teaching programs and teaching tips
- Curriculum grids for each topic area
- Additional activity worksheets.

Icons



This icon in the margin of the page represents that additional material is in the Interactive Textbook.



This brain icon with bracketed text indicates a Deeper thinking question, or questions, to help you dive deeper into an idea within the history chapters.

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Cognitive verbs and glossary

Knowledge utilisation

Conduct direct an action or course

Create produce or evolve from your own thought or imagination; reorganise or put elements together into a new pattern or structure or to form a coherent or functional whole

Decide examine alternatives to choose an option; reach a resolution as a result of consideration

Determine demonstrates understanding of knowledge using varying levels of skills; establish, conclude or ascertain after consideration, observation, investigation or calculation; decide or come to a resolution

Evaluate make an appraisal by weighing up or assessing strengths, implications and limitations; make judgments about ideas, works, solutions or methods in relation to selected criteria; examine and determine the merit, value or significance of something, based on criteria

Generate produce; create; bring into existence

Investigate carry out an examination or formal inquiry in order to establish or obtain facts and reach new conclusions; search, inquire into, interpret and draw conclusions about data and information

Justify give reasons or evidence to support an answer, response or conclusion; show or prove how an argument, statement or conclusion is right or reasonable

Predict give an expected result of an upcoming action or event; suggest what may happen based on available information

Propose put forward a point of view (or an idea, an argument or a suggestion), for consideration or action

Research study in detail, especially in order to discover new information or reach a new understanding

Synthesise combine different parts or elements (such as information, ideas or components) into a whole, in order to create new understanding

Analysis

Analyse consider in detail, for the purpose of finding meaning or relationships, and identifying patterns, similarities and differences

Apply use or employ in a particular situation

Compare estimate, measure or note how things are similar or dissimilar

Consider think deliberately or carefully about something, typically before making a decision; take something into account when making a judgment; view attentively or scrutinise; reflect on

Distinguish recognise as distinct or different; note points of difference between; discriminate; discern; make clear a difference/s between two or more concepts or items

Examine determine the nature or condition of something

Generalise to make a statement that relates to many people, things, or conditions, based on limited facts

Infer reach a conclusion on the basis of evidence or reasoning

Interpret explain the meaning of information or actions

Judge form an opinion or conclusion about; apply both procedural and deliberative operations to make a determination

Reflect on think about deeply and carefully

Suggest communicate or show an idea to consider

Comprehension

Communicate convey knowledge and/or understandings to others; make known; transmit

Describe give an account of characteristics or features

Explain provide additional information that demonstrates understanding of reasoning and/or application

Illustrate show the meaning or truth of something more clearly, especially by giving examples

Organise arrange, order; form as or into a whole consisting of interdependent or coordinated parts, especially for harmonious or united action

Represent use words, images, symbols or signs to convey meaning

Sequence place in a continuous or connected series; arrange in a particular order

Retrieval

Demonstrate prove or make clear by argument, reasoning or evidence, illustrating with practical example; show by example; give a practical exhibition

Identify establish or indicate who or what someone or something is

Recognise identify or recall particular features of information from knowledge; identify that an item, characteristic or quality exists; perceive as existing or true; be aware of or acknowledge

Select make a choice between options

Use operate or put into effect; apply knowledge or rules to put theory into practice

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PART 1 HISTORY

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What is History?

History is full of exciting topics that many people spend their lives studying. Whether it be the valorous knights and magnificent castles of medieval Europe or the honourable samurai of shogunate Japan, history has something that will appeal to everyone. It's full of heroes and villains, acts of great courage, and the consequences of the actions of despicable tyrants.

perspective the way we see something, a point of view or attitude to something

primary source a source of information about the past created in the time being studied

secondary source a source of information about the past created after the time being studied

artefact an object that is made by a person, such as a tool or a decoration; it is usually of historical interest

oral history the recording of past events in a spoken form including through song, story or dance

By studying history, we gain a better understanding of the similarities and differences between (and within) civilisations. We can also examine what has changed, what has stayed the same, and why this is the case. Our understanding of the past changes as we make new discoveries. This is one of the reasons history is such an exciting topic to study.

The study of history uses specific methods and techniques, most importantly the use of historical sources. As we study these sources, they help us to form opinions about what we think happened in the past. We learn to think critically and creatively, to question, imagine possibilities, and argue opinions based on these historical sources.

Using historical sources

People can have quite different **perspectives** of the same events, so when historians are devising answers about what happened in the past, they need to base their proposed answers on evidence. A **primary source** is made at the time of what is being studied, while a **secondary source** is a later description or interpretation. Historians need to think carefully about whether a source is primary or secondary and the limits of what a source can tell us about the past. Historians often work with **artefacts**, objects from the past time being studied. **Oral histories** are the spoken or performed knowledge of the past that has been systematically passed down through generations of people.

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▲ **Source 1A** Historical remnants of medieval Europe are still visible today. What could historians learn by analysing historical sources such as these?



THINKING DEEPER

If a historian one hundred years from now tried to write a history of what your school was like while you were a student there, what might be some primary sources they could use? Can you think of any possible issues with the accuracy of their interpretations of these sources?

As a historian, you will need to **analyse** and **evaluate** evidence from primary and secondary sources to be able to form your own opinions about the lives of people in the past. As you will learn, the key concepts to consider when working with historical sources are the **origin**, **context**, **purpose**, **accuracy** and **usefulness** of sources. The diagram in Source 1B shows some of the questions you could consider when analysing and evaluating information from the sources you encounter in the following chapters.

analyse consider in detail for the purpose of finding meaning or relationships, and identifying patterns, similarities and differences

evaluate examining and judging the merit or significance of something

origin analysis of a source to establish who created the source as well as where and when it was produced

context the analysis of sources to understand the nature of society and the historical period the source is created, the significant event/s related to the source, and the language and ideas of the time

purpose analysis of a source to establish the original reason for its creation

accuracy the analysis of a source to establish correctness by identifying purpose, corroborating the information with another source and assessing bias

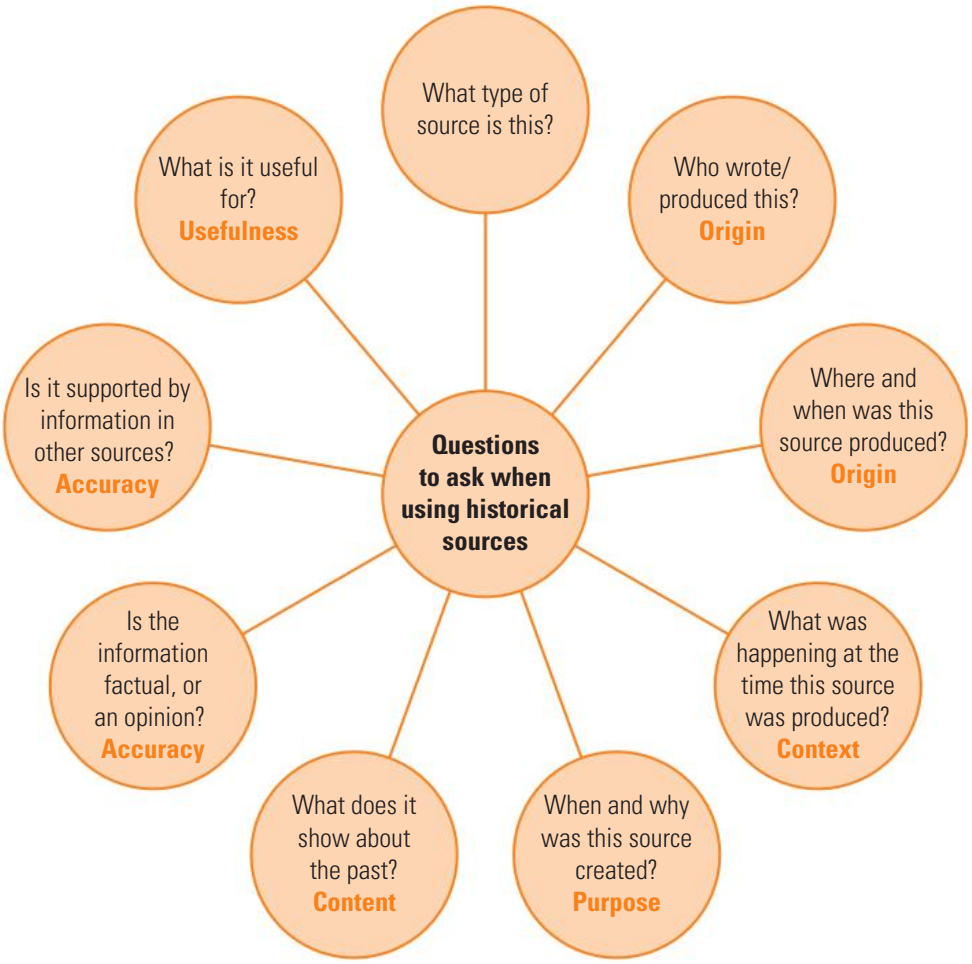
usefulness the analysis of a source to determine how relevant it is in relation to historical questions

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▲ **Source 1B** Questions to ask when using historical sources. Depending on the source, some of these questions may not always be relevant or easy to answer.

Introducing historical concepts and skills

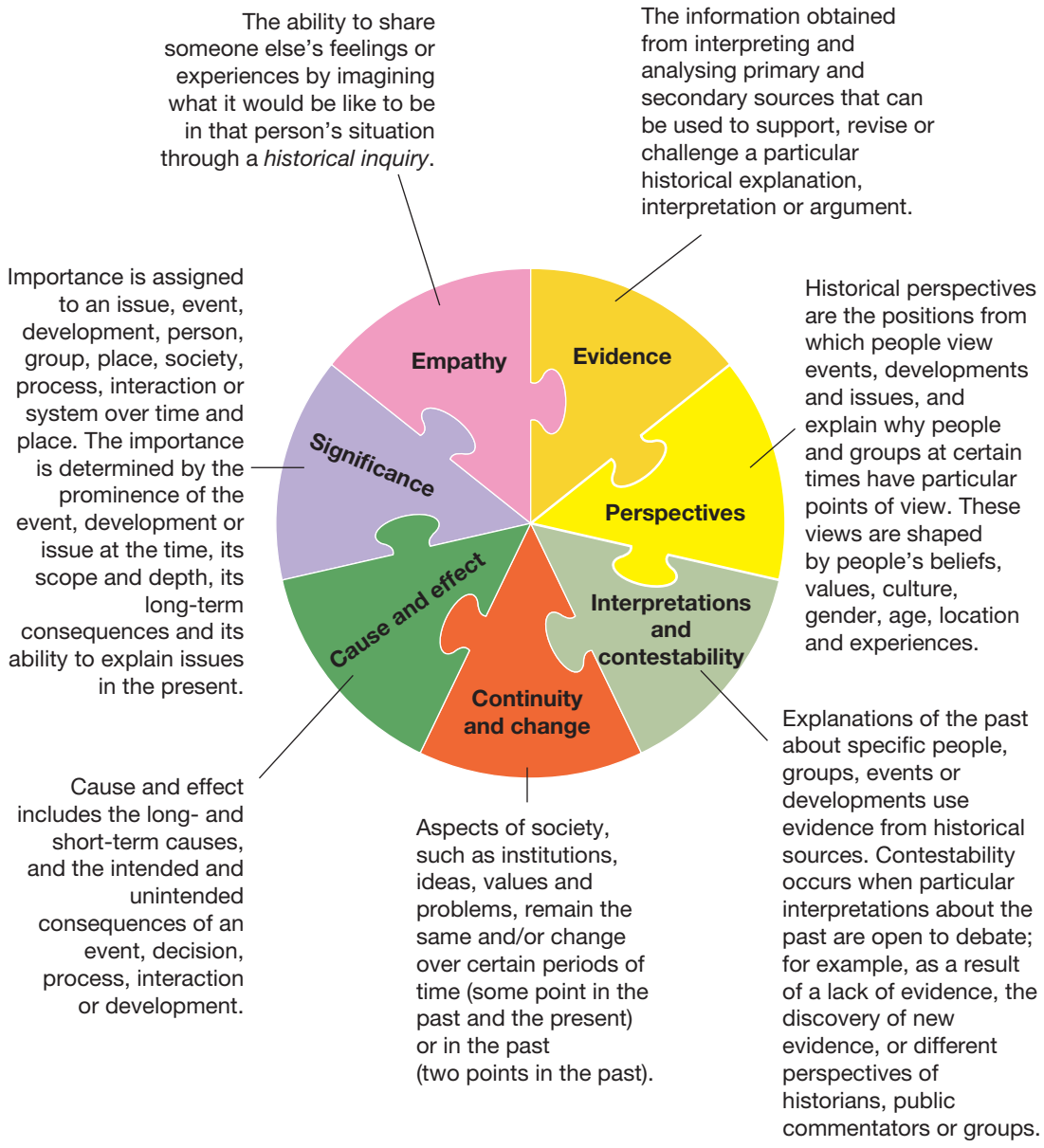
Historical concepts and skills help to guide the way you question and think about an issue. The six concepts from the Australian Curriculum: History V9.0 that are used in the following chapters on History are: **evidence**, **perspectives**, **interpretations and contestability**, **continuity and change**, **cause and effect**, and **significance**.

We will also have a special emphasis in this book on the development of **empathy** – an important part of trying to understand the lives of people who came before us. As you work through the History chapters, you will come across these seven historical concepts, and will hopefully learn a lot about them.

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History concepts



▲ **Source 1C** Adapted from ACARA, 'Understand this learning area: History 7-10', Australian Curriculum: History V9.0

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UNIT

1

Medieval Europe and the early modern world

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Overview

Knights in shining armour, hordes of raiding Vikings, or the multicultural splendour of the Ottoman Empire … what was life like in the Middle Ages? These societies built upon the knowledge and understandings of the ancient period and developed sophisticated technological advances and social practices, some of which are still in use today.

This chapter explores the experiences of people in medieval society and the events and conditions that shaped their lives. By engaging with evidence from the time, you will investigate their way of life, developments and cultural achievements, power and authority, significant individuals, and the challenges those individuals and their societies faced. As you investigate this topic, consider how the experiences of those living in medieval Europe compare to the modern world, and reflect on how you think the medieval world should be seen today.

Learning goals

After completing this unit, you should be able to answer these questions:

- How did societies change from the end of the ancient period to the beginning of the modern age?
- What key beliefs and values emerged, and how did they influence societies?
- What were the causes and effects of contact between societies in this period?
- What were the perspectives of people from the time?
- Which significant people, groups and ideas from this period have influenced and shaped the world today?
- How and why have historians interpreted this period differently?

◄ **Source 1D** Medieval knights in battle, detail from the Bayeux Tapestry that depicts the Norman invasion of England

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CHAPTER 1: Medieval Europe (c.590–c.1500 CE): what was life like for people in medieval Europe?

Setting the scene: medieval artefacts – a window into life in medieval Europe

Have you ever wondered what your life might look like to archaeologists and historians hundreds of years in the future? What might they think your life was like based on the possessions you left behind, the buildings you lived in or the artworks you created?

Archaeological evidence provides us with valuable insights into many different aspects of life and culture in past societies, including the people of medieval Europe. With each new discovery, we learn more about how these people lived, what they valued, what they believed in, what they did in their leisure time and how they interacted with each other.

To help them make sense of the archaeological evidence, historians and archaeologists use written evidence from the time periods they are studying such as manuscripts, letters, biographies, journals and legal documents. For this task, however, you will be challenged to draw some conclusions about society in medieval Europe based solely on the archaeological evidence available!

ACTIVITY 1.1

Artefact activity

In this activity, you will **analyse** and **evaluate** artefacts from medieval Europe to suggest what daily life may have been like for people of the time.

Question: What might artefacts reveal about the lives of people in medieval Europe?

Step 1: Either individually, in pairs or in small groups, **select** one of the artefacts provided below for your investigation.

Step 2: Complete a 'See-Think-Wonder' thinking routine to record your initial impressions of your chosen artefact. In your pair or small group, **discuss** your answers to the following questions:

a **Identify** what details you see or notice.
b **Explain** what you think these details might represent and what your artefact might suggest about life in medieval Europe.

»

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»

c Now that you have seen this artefact, **describe** what you wonder about medieval Europe or what questions it raises for you.

Step 3: Conduct some research online to find out more about the features of this artefact, and how it might be useful for gaining an insight into life in medieval Europe. Use the following questions to help you **analyse** and **evaluate** the artefact.

Describe	What is this and who might have made it? When and/or why might it have been made?
Analyse	What are some of the significant details or features of this artefact? What might be the meaning or purpose of these details or features? What insights might these details provide about life in medieval Europe?
Evaluate	How useful or reliable do you think this artefact is for learning about any of the following features of life in medieval Europe and why? • Food and diet • Religious beliefs • Entertainment and leisure activities • Home, family and daily life • Work, business and trade • Social structure • Funerary practices • Warfare

Step 4: Develop a **hypothesis** regarding how useful this artefact is for learning about daily life in medieval Europe. Using at least three features of the artefact as support, present your ideas to your class in a format chosen by your teacher. Suggested formats could be a presentation, poster, paragraph, mind map, role-play, magazine article or short video.

hypothesis tentative argument based on the evidence available

Step 5: Reflect on your learning: make a list of questions on what else you would like to know about medieval Europe. Share these with your class before you begin the depth study that follows. By the end of this depth study, see what questions you have found answers to.

Artefact 1



▲ **Source 1.1** The Lewis Chessmen, from the Island of Lewis, Scotland, c.1150–75 CE

»

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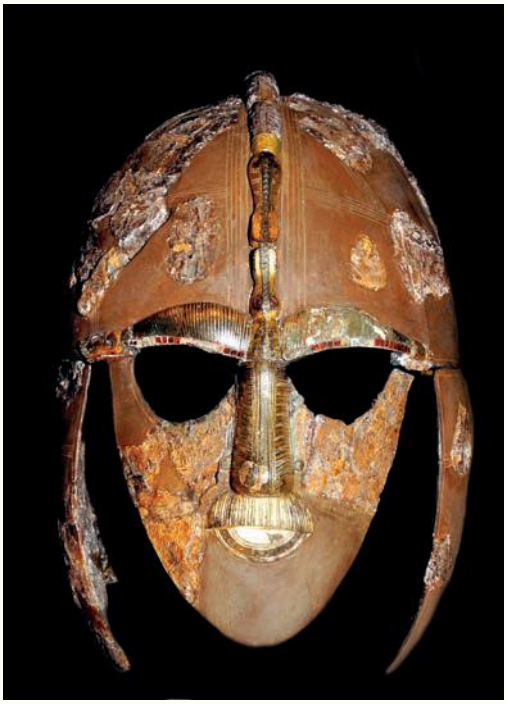
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Artefact 2



▲ **Source 1.2** The Royal Gold Cup, or St Agnes Cup, made in France, c.1370–80 CE

Artefact 3



▲ **Source 1.3** The Sutton Hoo Helmet, from Sutton Hoo, England, early 600s CE

Artefact 4



▲ **Source 1.4** A gold belt-buckle found at Sutton Hoo, England, early 600s CE

Artefact 5



▲ **Source 1.5** The Holy Thorn Reliquary, probably made in France, c.1400 CE

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Artefact 6



▲ **Source 1.6** The Franks Casket, a lidded rectangular whale's bone box, found at Auzon, France, early 700s CE

Artefact 7



▲ **Source 1.7** A stone sceptre found at Sutton Hoo, England, early 600s CE

Artefact 8



▲ **Source 1.8** Scene 42 from the Bayeux Tapestry, a 70-metre-long embroidered cloth, probably created in England in the eleventh century

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Chapter overview

Introduction

We study medieval Europe to understand how the modern world came to be. The era between the fall of the Roman Empire in 476 CE and the birth of Renaissance Europe in 1500 CE is often thought of as a time of violence, disease, cruelty and barbarism; however, perhaps it was much more than this, and should instead be seen as a time when European civilisation began to slowly move forward in knowledge, architecture, faith, medicine and technology.

A study of medieval Europe gives us a window into a world of brave knights in shining armour, kings, queens and war. You will learn about the spread of Christianity to the west of Europe, its relationship with Islam in the east and the power of religion over ordinary people's lives. You will also learn how the catastrophic disease known as the Black Death forced humans to re-evaluate the world around them.

Key inquiry question

'What was life like for people in medieval Europe?'

Every key inquiry question should have:

- An open interrogative
- A historical concept
- Specific content
- Scope and scale.

So, let's dissect this key inquiry question: 'What was life like for people in medieval Europe?'

To answer a key inquiry question in a historical investigation, it is helpful to break the question into sub-inquiry questions.

Sub-inquiry questions

After completing this chapter, you should be able to answer these sub-inquiry questions:

- What was life like in Europe following the collapse of the Roman Empire?
- What was life like for a noble or knight in medieval Europe?
- What was life like for peasants in medieval society?
- What was life like for women in medieval society?
- What effect did religion have on the lives of people in medieval Europe?
- What was warfare like in medieval Europe?
- What were the Crusades and what do they reveal about life in medieval Europe?
- How did the actions of significant individuals impact the lives of people in medieval Europe?
- How did the Black Death impact life in medieval Europe?

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Historical skills

After completing this chapter, you should be able to:

- **Develop** historical questions about the past to **inform** historical inquiry
- **Locate** and **identify** primary and secondary sources to **use** in historical inquiry
- **Identify** the origin, content, context and purpose of primary and secondary sources
- **Identify** and **describe** the accuracy and usefulness of primary and secondary sources as evidence
- **Describe** causes and effects and **explain** continuities and changes
- **Identify** perspectives, attitudes and values of the past in sources
- **Explain** historical interpretations about significant events, individuals and groups
- **Create** descriptions, explanations and historical arguments, using historical knowledge, concepts and terms that reference evidence from sources.



▲ **Source 1.9** Peasants preparing the fields next to the medieval Louvre Castle for the winter with a harrow and sowing for the winter grain, from *The Very Rich Hours of the Duke of Berry*, painted by Dutch painters the Limbourg brothers around 1410

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Timeline of key events

What came before this topic?

For 500 years, the Roman Empire controlled much of Europe. From their centre of power in Rome, Italy, the Romans ruled through force and superior organisation. Stretching from North Africa to England and the Middle East, the vast armies of Rome brought roads, technology, law and order, and stability. However, by the fifth century, Roman rule had begun to anger many, and their enemies gathered to destroy one of the greatest empires Europe had ever known.



▲ For 500 years the Roman Empire reigned over much of Europe. This relief depicts an elite Roman centurion and soldier.



◄ Portrait of Charlemagne, who was one of the most powerful kings during the medieval period of European history

476 CE
The Western Roman Empire falls

537 CE
The Hagia Sophia is built in Constantinople (capital of the Eastern Roman Empire)

570 CE
The Prophet Muhammad is born

800 CE
Charlemagne is named the ruler of the Holy Roman Empire

1066 CE
William of Normandy wins the Battle of Hastings, becoming King of England

1096 CE
The First Crusade to the 'Holy Land' begins

1187 CE
Saladin leads a Muslim military campaign to recapture Jerusalem from the Christian armies



◄ William of Normandy as shown in the Bayeux Tapestry

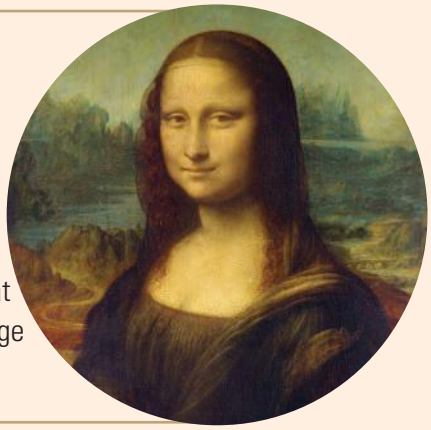
Responding to the timeline

1 **Explain** what the term CE used on the timeline means.
2 Use the timeline to **identify** three challenges faced by people in medieval Europe. These could be natural disasters, major changes or attacks.
3 **Create** two historical questions about significant events shown in the timeline. These should be questions that you would like to learn about as you move through the chapter.

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What came after this topic?

After the Black Death, Europe would never be the same. Old structures such as feudalism were questioned, and people began to see the world in new ways. A new class of people, known as merchants, began to generate wealth and wield power in ways that few monarchies could imagine. Science, technology and art were all pursued to build a world that was less concerned with war and conquest, but more focused on knowledge and discovery.



▲ Leonardo da Vinci's Renaissance-era masterpiece artwork, the *Mona Lisa*, was completed around 1506.

1215 CE
The Magna Carta is created in England; this limits the power of the king and introduces ideas of justice, democracy and individual freedom

1337 CE
The Hundred Years' War between England and France begins

1348 CE
Sailors bring the bubonic plague (Black Death) to Italy from the East; it quickly spreads across Europe

1353 CE
The Black Death kills more than a third of Europe's population

1378 CE
A split occurs within the Catholic Church, creating two popes

1381 CE
The Peasants' Revolt breaks out in England

1415 CE
The English gain the upper hand in the Hundred Years' War at the Battle of Agincourt

1431 CE
Joan of Arc leads French armies into battle and inspires great victories; when captured by the English, Joan is burned at the stake as a heretic



◄ Tomb of King Edward III of England; he led England at the start of the Hundred Years' War



▲ Joan of Arc in armour

4 **Conduct** research into one of the significant individuals mentioned on this timeline and **create** a biographical profile poster to put up on the wall of your classroom. You may wish to use the following headings to help structure your poster:

- Historical context
- Early life
- Achievements
- How they were perceived by contemporaries
- Their overall role in the history of medieval Europe.

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1

1.1 The transformation of the ancient world to the early modern world: what was life like in Europe following the collapse of the Roman Empire?

FOCUS QUESTIONS

- What was Europe like under the Roman Empire?
- How did the Roman Empire collapse?
- How did the collapse of the Roman Empire change Europe?
- How did the reign of Charlemagne play a role in the development of the feudal system in Europe?
- How did feudalism shape life in medieval Europe?

What was Europe like under the Roman Empire?

Medieval Europe emerged after the collapse of one of the great human civilisations, the Roman Empire. Over a period of more than 1000 years (753 BCE–476 CE), the Roman Empire unified much of Europe through conquest and war, spreading Roman culture, law and administration throughout the empire and connecting the cities of the empire through roads and organised trade networks. Cities in the Roman Empire used Rome as their model for political organisation, and in exchange for paying taxes, these cities benefited from the protection of the Roman armies against the threat of foreign invasion, as well as from the introduction of Roman engineering, technology and architecture. Inhabitants of the



▲ **Source 1.10** The Roman Empire at its height, c.117 CE

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ACTIVITY 1.2
RESPONDING TO THE SOURCE

Using Source 1.10 and Google Maps, **identify** what present-day countries were part of the Roman Empire.

Roman Empire were connected by aspects such as Roman citizenship, the Latin language and service in the Roman armies. Life in the empire was probably relatively stable, leading to some Romans even describing the period of c.27 BCE to 180 CE as the '*Pax Romana*', or 'Roman Peace'.

emperor ruler of an empire

barbarian member of a people not belonging to Rome

How did the Roman Empire collapse?

Around 200 CE, however, the stability of the empire was threatened by a series of ineffective **emperors** in Rome, as well as constant attacks along its borders by outsiders, known as **barbarians**. The empire had also become large and difficult to manage, and in 286 CE was divided into the Eastern and Western Roman Empires. While Roman rule had never been popular among the European tribes, most lived in peace until the Germanic tribes from the north, such as the Vandals, Visigoths and Ostrogoths, began to attack and capture towns on the fringes of the western empire. Over the next two centuries, the attacks of these tribes intensified until they eventually began to attack Italy itself.

From 383 CE, Rome began withdrawing troops from Britain to protect the core of its empire. In 410 CE, the city of Rome was attacked by the Visigoths.



▲ **Source 1.11** Map of Europe showing areas of the western Roman Empire inhabited or controlled by barbarian tribes by c.476 CE. (KDM: Kingdom)

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In 430 CE, Spain and North Africa fell from its grip. In 450 CE, Gaul (France) was invaded by Attila the Hun and his barbarian armies from the east. In 476 CE, rule by Roman Emperors in Rome itself was ended when Odoacer, a Germanic soldier in the army, led a rebellion by his fellow tribesmen and installed himself as King of Italy.

ACTIVITY 1.3
RESPONDING TO THE SOURCES

1 **Compare** the map of Europe in Source 1.10 to the map in Source 1.11. **Describe** the main differences you notice.
2 **Propose** what kinds of consequences people in Europe might have experienced because of the collapse of the Western Roman Empire.

How did the collapse of the Western Roman Empire change Europe?

When Roman rule, which had unified and protected most of Western Europe, came to an end, it was replaced by the rule of Germanic barbarians: Ostrogoths in Italy, Visigoths in Spain, Vandals in North Africa and Franks in France (Gaul). War broke out all over Western Europe as leaders of different tribes sought to fill the void left by Roman rule. They began to establish their own societies that they could control and protect from invasion. To build their societies, they needed people to provide labour and taxes. These leaders took on titles such as **lord, earl, duke and baron** and would provide protection, food and housing for their workers. This system of living became known as **feudalism**. Roman culture and knowledge began to disappear and these regions, now without the centralised administration of Rome, were forced to develop new methods of political administration, commerce, social organisation, military protection and taxation.

lord, earl, duke and baron titles used by people from the nobility to determine their rank

feudalism (or 'feudal system') a system of social exchange, where lords gave land to vassals in exchange for loyalty and service

brigand robber or bandit

monastery Christian community of religious people called monks or nuns, and the building where they lived and worked

No longer protected by the Roman armies, the important trade routes and networks that had connected cities across the empire were disrupted by raiding. It was not safe for people to travel, as the roads were dominated by **brigands**. The populations of these cities declined as many of their inhabitants left to start new lives in rural areas, leading to the eventual collapse of the cities as major commercial and administrative centres.

This period between 500 CE and 1000 CE has often been called the 'Dark Ages', because the 'light' of Roman civilisation had been extinguished. For centuries, historians used this term because European development seemed to come to a halt after the Roman and Greek civilisations had made so many great advancements in society. Crucially, the lack of written evidence from this period meant it was difficult to learn about it. When Rome fell, its language, and reading and writing were no longer as valued as they had once been. In truth, the Dark Ages were not so dark. Christian **monasteries** around

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Europe were building libraries to save and store Roman and Greek knowledge that aligned with their religion, amid a world of warfare, destruction and looting. Knowledge was still valued, but only a few had the education to access and read it. Much of Greek learning was lost to Western Europe and survived only in the Eastern Empire.

The influence of the Christian Church increased significantly during this time, as it replaced the city of Rome as a source of authority and guidance for local rulers. In 323 CE, **Christianity** was made the official religion of the Roman Empire by Constantine I. When the Roman Empire fell in 476 CE, Christianity remained strong in southern Italy. Over the next four centuries, Christian **missionaries**, led by the **pope**, spread the religion beyond Italy and across Europe. As Christianity gained followers, which included tribal leaders of the very groups who had destroyed the Roman Empire, the **Roman Catholic Church** became a **moral authority** over the people of Europe.

> The brightest light of the whole world is extinguished; indeed the head has been cut from the Roman Empire. To put it more truthfully, the whole world has died with one City.

▲ **Source 1.12** A letter from St Jerome, written following the sack of Rome by the Visigoths in 410 CE, describing Rome's importance to Europe

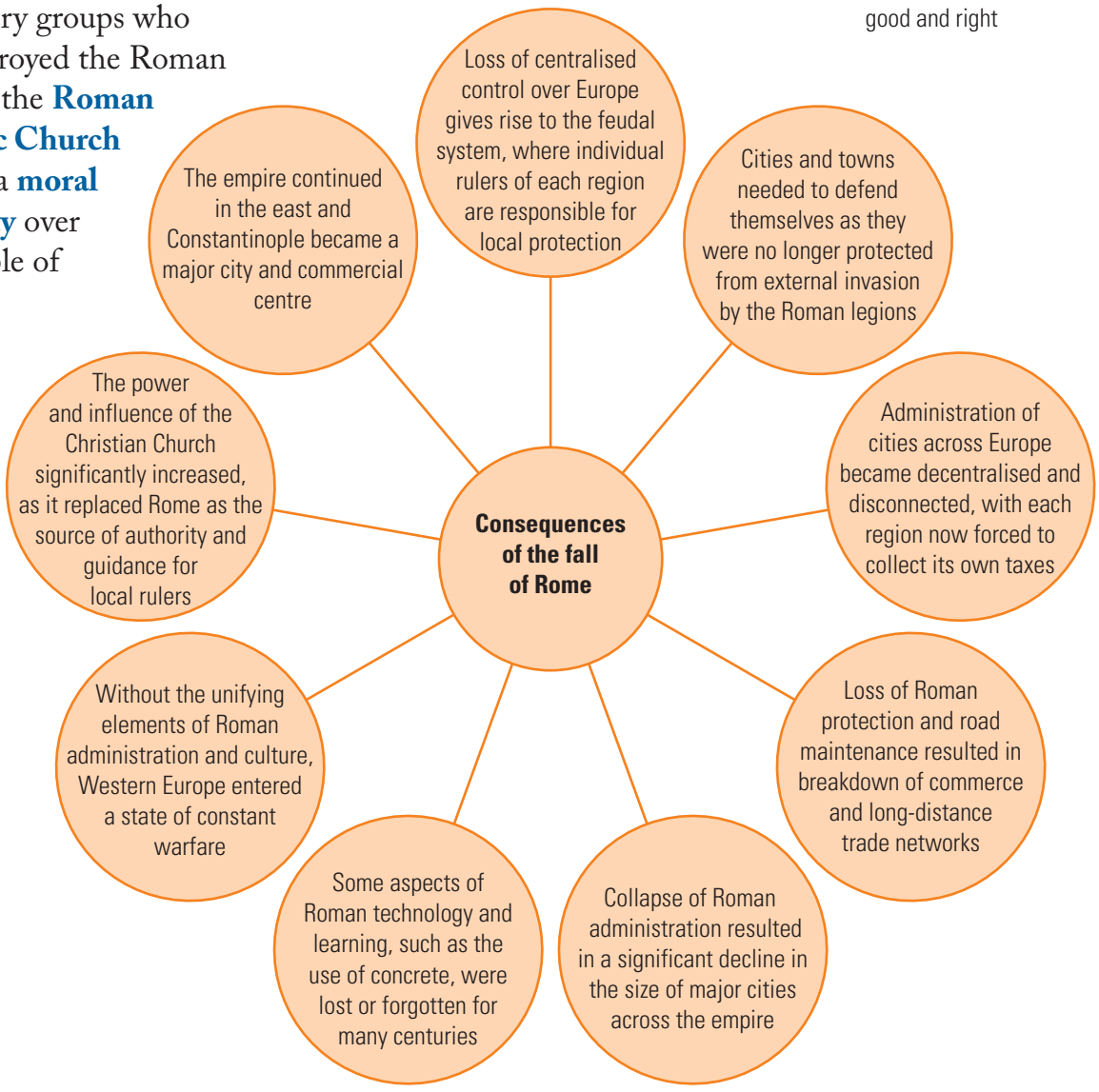
Christianity religion based on the person and teachings of Jesus Christ, its beliefs and practices; the dominant faith in medieval Europe

missionary person sent on a religious mission to promote Christianity

pope head of the Roman Catholic Church

Roman Catholic Church early strand of Christianity where the head is based in Rome, Italy

moral authority guiding group who determine what is good and right



▲ **Source 1.13** Consequences in Western Europe of the fall of Rome

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ACTIVITY 1.4
RESPONDING TO THE SOURCES

1 Of the consequences shown in Source 1.13, **propose** which one would have had the most significant impact on the lives of peasants and ordinary people. **Discuss** your answer with a partner.

2 **Interpret** the main idea of the quote by St Jerome given in Source 1.12. **Describe** what St Jerome suggests were the consequences of the fall of Rome.

3 **Conduct** research to find out when St Jerome was writing. **Explain** how this might affect the reliability and usefulness of the source.

THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Significance.

Your response should contain:

- Identification of what elements are significant in relation to the content of the question
- A clear statement about the degree of significance (i.e. very significant, somewhat significant)
- Evidence from the sources to support this judgement of significance.

How did the reign of Charlemagne play a role in the development of the feudal system in Europe?

Charlemagne (742–814 CE), or Charles the Great, established the first great European empire of the medieval era and contributed to the development of the feudal system in France and Germany. After becoming king of the Franks in 771 CE, Charlemagne managed to unite most of Europe during the first half of his reign, and on Christmas Day in 800 CE, he was crowned 'Emperor of the Romans' by Pope Leo III, the leader of the Church at the time. This was the first time this title had been given to a ruler from Western Europe since the collapse of the Roman Empire.

Charlemagne selected his most trustworthy supporters, as well as bishops of the Church, to control the different regions of his empire. In granting these noble families and religious leaders land, he was given their loyalty in return. These nobles (also referred to as lords or barons) ruled over the local people through fighters, commonly known as knights, who protected the villagers and farmers in return for their labour and loyalty. With the support of the Church, Charlemagne was able to maintain control over a vast population. Significantly, he was the first to do so since the fall of the Western Roman Empire. As society in medieval Europe was highly religious, the Christian Church became very powerful, wealthy and influential, with bishops enjoying equal status with the **nobility**.

nobility group of people who had greater privileges and rights than the majority

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▲ **Source 1.14** The extent of Charlemagne's empire from c.771 CE to c.800 CE

ACTIVITY 1.5
RESPONDING TO THE SOURCE

Use the text and Source 1.14 to answer the following questions.

1. **Describe** the growth of Charlemagne's Empire from 771 CE to 800 CE.
2. Using Google Maps, **identify** what present-day countries were part of his empire.
3. **Propose** how the support of the Church might have been beneficial to Charlemagne's rule over his kingdom. **Explain** why it might have been particularly significant to him to be recognised as 'Emperor of the Romans'.
4. **Explain** how Charlemagne was able to ensure the loyalty of the nobles and religious leaders in his kingdom. **Describe** how this contributed to the development of the feudal system in Europe.

Although Charlemagne's empire eventually came to an end, the powerful nobles and the system of giving land and protection in exchange for loyalty and labour survived. It would later become known as the feudal system, or feudalism. In 1066 CE, William the Conqueror, from Normandy (in the north of France), became King of England and introduced feudalism to England. He actively built large stone castles all over England, which served as the homes of his nobles and the centre of feudal communities. Throughout the rest of the history of medieval Europe, there were ongoing power struggles between the

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nobility and the Church, with each trying to assert authority over the other.

From this time on, it was common to see medieval society as being divided into three main groups (shown in Source 1.15), each with a different role to play. As you read through the rest of this chapter, consider what life was like for each of these groups, and how their experiences were shaped by the feudal system.



▲ **Source 1.15** The three groups (sometimes known as the three 'orders') that formed medieval European society



▲ **Source 1.16** A fourteenth-century CE bust of Charlemagne, containing a piece of his skull, on display at the cathedral at Aachen, Germany

ACTIVITY 1.6
RESPONDING TO THE SOURCE

1 **Explain** what role each of the three groups in Source 1.15 played in the success of society in medieval Europe.
2 With a partner, **compare** the division of society in Source 1.15 to society today. **Describe** any similarities or differences.

fief parcel of land

vassal in a feudal system, a holder of land or position granted by a superior in exchange for allegiance

mutual obligation social arrangement where two parties exchange goods or services for mutual benefit

How did feudalism shape life in medieval Europe?

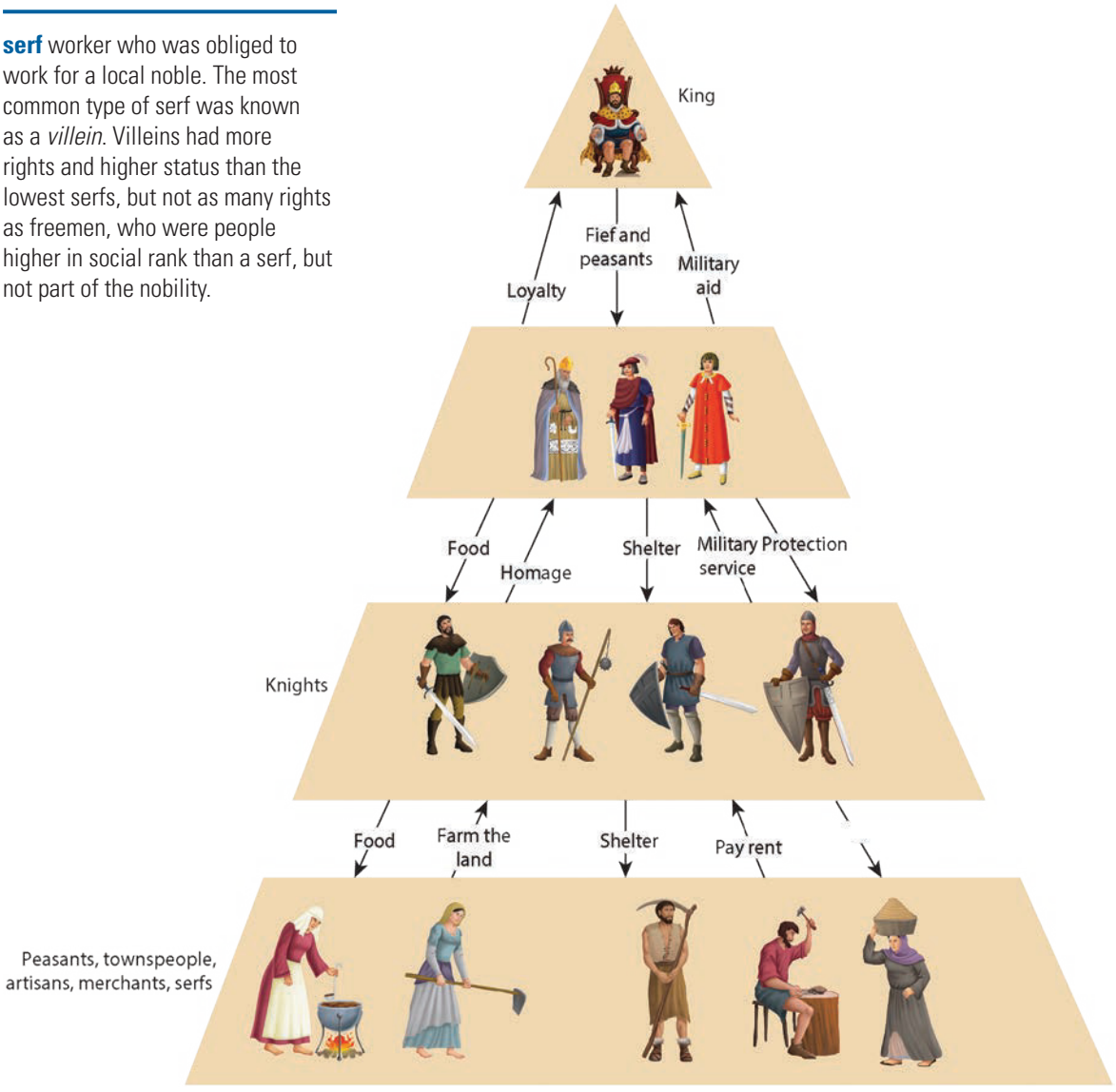
Feudalism in medieval Europe meant that the wealthier and more powerful members of society, known variously as nobles, barons or lords, provided protection and land (**fiefs**) to those beneath them, known as **vassals**, in exchange for taxes, labour and service. This relationship of **mutual obligations** between lords and vassals operated on multiple levels, and can be thought of as a pyramid, as shown in Source 1.17.

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ACTIVITY 1.7
RESPONDING TO THE SOURCE

1 **Examine** the diagram in Source 1.17. Based on the information in this diagram, **identify** which groups in medieval European society would have had the most and least power. **Explain** what kinds of roles members of each of these groups might have performed.
2 **Describe** the nature of the mutual obligation between a knight and a **serf**. **Identify** what a knight provided for a peasant and what they might have expected in return.
3 **Explain** what barriers might have prevented individuals from some levels of the feudal pyramid from moving higher up the social hierarchy.
4 **Explain** what the information in Source 1.17 reveals about what was valued in medieval European society.
5 **Explain** how the rigid social order of the feudal system might have helped maintain peace and stability in medieval Europe.
6 **Create** a social pyramid to represent another kind of social hierarchy in the world today, showing the relative position of different groups and the relationships between them. Some possible options might include a school, military group, religion, company, or some other kind of organisation or group.

serf worker who was obliged to work for a local noble. The most common type of serf was known as a *villein*. Villeins had more rights and higher status than the lowest serfs, but not as many rights as freemen, who were people higher in social rank than a serf, but not part of the nobility.



▲ **Source 1.17** The feudal pyramid

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ACTIVITY 1.8
MAKING THINKING VISIBLE

+1 routine

A routine for identifying important ideas worth remembering.

1. Having worked through Section 1.1, individually write down key points you can take away from the text. What have you learned about what life was like in Western Europe following the collapse of the Western Roman Empire? Try to do this without rereading the text.
2. Now, pass your notes to the person to your right. The person next to you needs to take 1–2 minutes to read through your notes and then to add one new note to the page. This can be new information, an elaboration on another note, or a connection between ideas.
3. Continue to pass notes around the room two more times.
4. Return all notes to the original owners.
5. Now, you may read and **reflect on** the additional notes made on your page and add ideas you may have picked up from reading other students' work.

REFLECTING ON YOUR LEARNING 1.1

Reflect on what you have learned in this section:

1. Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the question: 'What was life like in Europe following the collapse of the Western Roman Empire?'
2. **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'What was life like for people in medieval Europe?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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1

1.2 The roles and relationships of different groups in medieval Europe 1: what was life like for a noble or knight in medieval society?

FOCUS QUESTIONS

- What was the role of the nobility in medieval society?
- How did the relationship between the nobles and the king change because of the *Magna Carta*?
- What was the role of knights in medieval society?



◄ **Source 1.18** A medieval depiction of a church official, a knight and a peasant, representing the three classes of medieval society. From a c.1245 CE manuscript titled *The Image of the World*, by French priest Gautier de Metz.

Sources 1.19, 1.20 and 1.21 are depictions of German knights, from a fourteenth-century manuscript called the *Codex Manesse*. The *Codex Manesse*, also known as the *Great Heidelberg Book of Songs*, was a collection of love poems and songs by 140 different German nobles, knights and commoners, each accompanied by a miniature painting depicting the poet performing some kind of activity. It was compiled for the noble Manesse family of Zurich between 1300–1340 CE and provides us with a valuable insight into courtly life in medieval Europe. Most of the illustrations were painted by an individual known only as the Foundation Master.



▲ **Source 1.19** A depiction of Henry I, Count of Anhalt, and two other German knights fighting at a tournament



▲ **Source 1.20** A depiction of a German knight named Hesso von Rinach (c.1234–1275 CE)



▲ **Source 1.21** A depiction of a German knight named Brunwart von Augheim (c.1263–1296 CE)

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ACTIVITY 1.9
MAKING THINKING VISIBLE

See, think, wonder

This routine encourages you to make careful observations and thoughtful interpretations. It helps stimulate curiosity and sets the stage for inquiry.

Complete this activity on three post-it notes.

1. On your post-it notes, write your responses to the following questions:
   - **a** What do you *see* in these images (see Sources 1.19, 1.20 and 1.21) of medieval knights?
   - **b** What does this image make you *think* the roles, expectations and values associated with nobles and knights in medieval Europe might have been?
   - **c** What do these images make you *wonder*? What questions do you have?
2. Divide the class into three groups. Each group is to collate the class's answers to one of the 'See, think, wonder' questions.
3. Report back – what did the class see, think and wonder? What patterns emerged? Were there any ideas that stood out?
4. *Extension:* Follow up on one or more of the wonders and report back with an answer to the class.

What was the role of the nobility in medieval society?

tenant-in-chief lord, such as a baron or church official, who received their fief directly from the monarch

subtenant person who received a fief from a tenant-in-chief

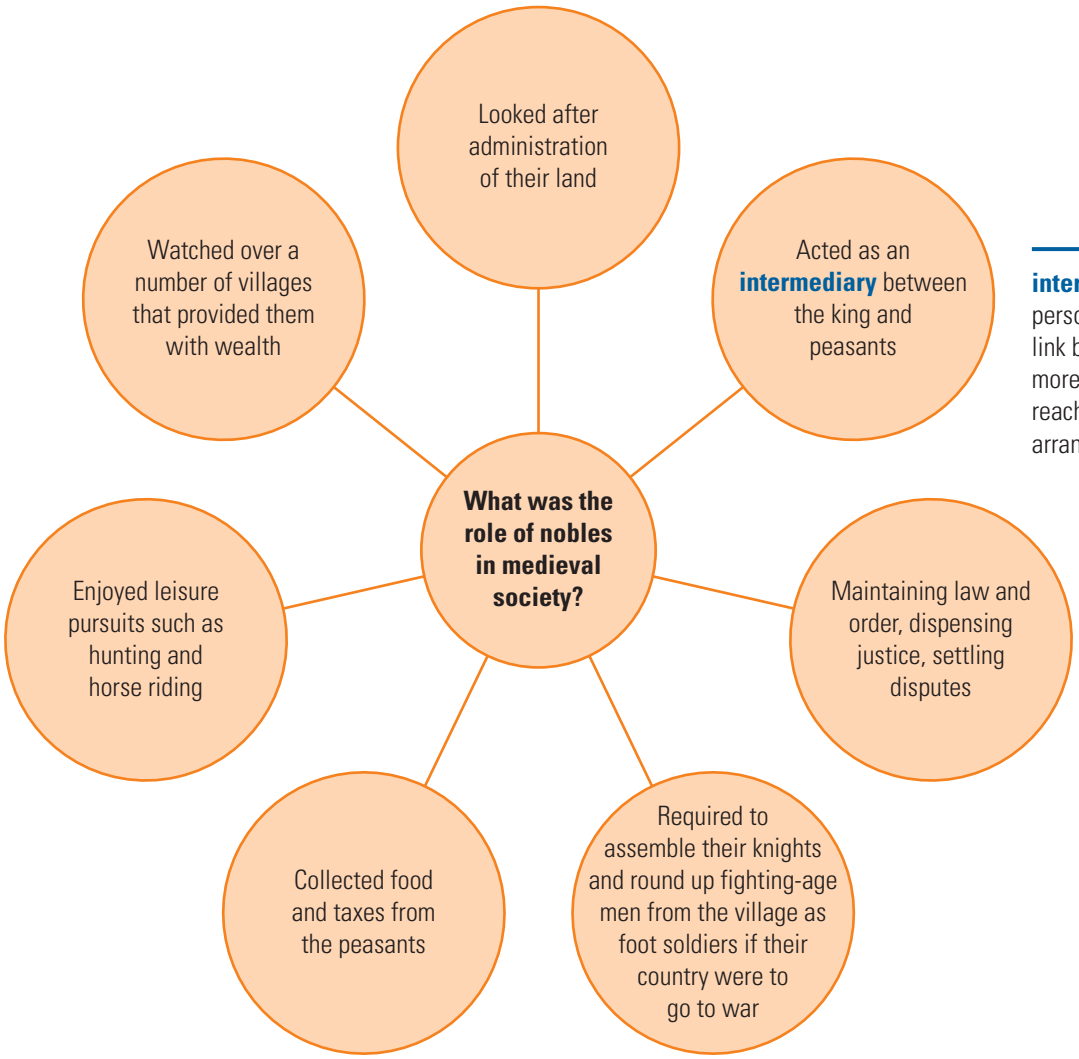
manor land owned by a lord

The king was at the top of the feudal pyramid in medieval society, but in reality he could not have ruled the kingdom without the help of the nobility (most of whom were **tenants-in-chief** who received their fief directly from the monarch). The nobles were lords, such as barons, earls and dukes, or senior church officials, such as bishops. They were either relatives or trusted allies of the king and lived far more luxurious lives than the majority of medieval society, within the safety of their castle walls.

In return for being granted control over a fief, the nobles pledged their loyalty and support to the king, and accepted responsibility for collecting taxes, enforcing laws and maintaining order in their fief. They provided advice to the king when needed and were obliged to provide knights and soldiers for the king's army. They also had to pay a tax to the king, known as scutage, or 'shield-money'. Their fiefs were held for life and could also be passed down to their heirs through inheritance.

Nobles who were tenants-in-chief also had the right to divide parts of their fief into smaller subfiefs, which they could grant to **subtenants** such as knights. In exchange for this grant of land, the subtenant swore an oath of loyalty to their lord and promised to serve them in battle when required. The land that was granted to the subtenant would have included a **manor** for them to live in, as well as one or more neighbouring villages and a number of farms to provide them with an income.

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▲ **Source 1.22** The role of nobles in medieval society

intermediary a person who acts as a link between two or more others to try to reach a satisfactory arrangement



▲ **Source 1.23** An image from a medieval manuscript known as *The Bible of Hamburg*, depicting King David I of Scotland knighting a squire, c.1300–1320 CE

To Henry king of the English, his most revered lord, William son of Siward sends his greeting. Your order, promulgated throughout England, has come to me … that we should inform you about our fiefs and the holding of them, which we hold from you. And so I am letting you know by this letter that I hold from you a certain village, Gosford by name … for the fee and service of one knight, which I faithfully perform to you …

▲ **Source 1.24** A letter sent to King Henry II by one of his vassals named William, son of Siward, c.1166 CE

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To William most glorious duke of the Aquitanians, bishop Fulbert offers his prayers:

… he who swears fealty to his lord … should not cause physical injury to his lord … should not harm him by compromising his secrets or defences … should not injure his lord in his justice or in other matters that relate to his honour … should not cause harm to his possessions …

… [in each of the areas previously mentioned] he should also provide advice and assistance to his lord …

The lord also ought to act toward his faithful vassal reciprocally in all these things. And if he does not do this, he will be justly considered guilty of bad faith, just as the former, if he should be detected in the avoidance of or the doing of or the consenting to them, would be perfidious and perjured.

▲ **Source 1.25** A description of the mutual duties of vassals and lords, titled *On Feudal Obligations*, by a French bishop named Fulbert of Chartres, c.1020 CE



▲ **Source 1.26** A fourteenth-century depiction of a German duke named Conradin (c.1252–1268 CE), from a manuscript called the *Codex Manesse*

Legal rules for military service

The baron and all vassals of the king are bound to appear before him when he shall summon them, and to serve him at their own expense for forty days and forty nights, with as many knights as each one owes; and he is able to exact from them these services when he wishes and when he has need of them. And if the king wishes to keep them more than forty days at their own expense, they are not bound to remain if they do not wish it. And if the king wishes to keep them at his expense for the defence of the realm, they are bound to remain. And if the king wishes to lead them outside of the kingdom, they need not go unless they wish to, for they have already served their forty days and forty nights.

▲ **Source 1.27** An excerpt from a medieval text called the *Etablissements de Saint Louis*, a collection of laws in medieval France from around 1273 CE, probably compiled by a lawyer from the time

ACTIVITY 1.10
RESPONDING TO THE SOURCES

1. **Examine** the image in Source 1.23. **Identify** which groups of the feudal pyramid (refer to Source 1.17 if needed) are represented in this image. **Explain** what makes you think this.
2. **Describe** what you think may be occurring in the scene depicted in Source 1.23.
3. Source 1.24 and Source 1.25 provide examples of mutual obligation. Use these sources to **identify**:
   - What the lords mentioned in these sources were required to provide for their vassals
   - What the vassals mentioned in these sources were required to provide for their lords.
4. **Describe** what might be happening in the scene shown in Source 1.26. **Explain** what this might suggest about the lifestyle of the nobility in medieval Europe.
5. Based on the information in Source 1.27, **identify** for what length of time barons and vassals of the king were required to provide knights if their king requested it.

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How did the relationship between the nobles and the king change because of the *Magna Carta*?

In 1215 CE, a serious political crisis was emerging in England. A dispute between a group of English barons and King John led to the barons renouncing their allegiance to the King and threatening rebellion. Normally, such crimes of treason led to death, but the barons raised a force strong enough to capture London on 17 May 1215 CE. John had no choice but to negotiate and the *Magna Carta* was born, a document that declared that all English citizens, including the king, were not above the law.

The *Magna Carta* introduced ideas of justice, democracy and individual freedom. Some of the outcomes of the *Magna Carta* were to protect the rights of the Church, to prevent nobles from being illegally imprisoned by the king and to reduce the feudal payments that nobles were required to pay to the king. While these rights were still many centuries away for peasants and ordinary people, and the *Magna Carta* itself took many forms over the years – it was repealed, replaced, rewritten and fought over – it laid the foundations for a world where a king was not the sole authority of the land and many decisions (especially those related to tax) were only possible with the will of the English people.



▲ **Source 1.28** One of four surviving copies of the *Magna Carta*, c.1215 CE

ACTIVITY 1.11
RESPONDING TO THE SOURCE

1 **Explain** why the barons might have considered it important to have their agreements with the king set out in the written document shown in Source 1.28.

2 **Explain** how the *Magna Carta* changed the nature of the relationship between the king and the nobles.

3 Using the information in this section, **identify** three rights that citizens of Australia have today that might have their origins in the *Magna Carta*.

THINKING DEEPER
HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Cause and effect.

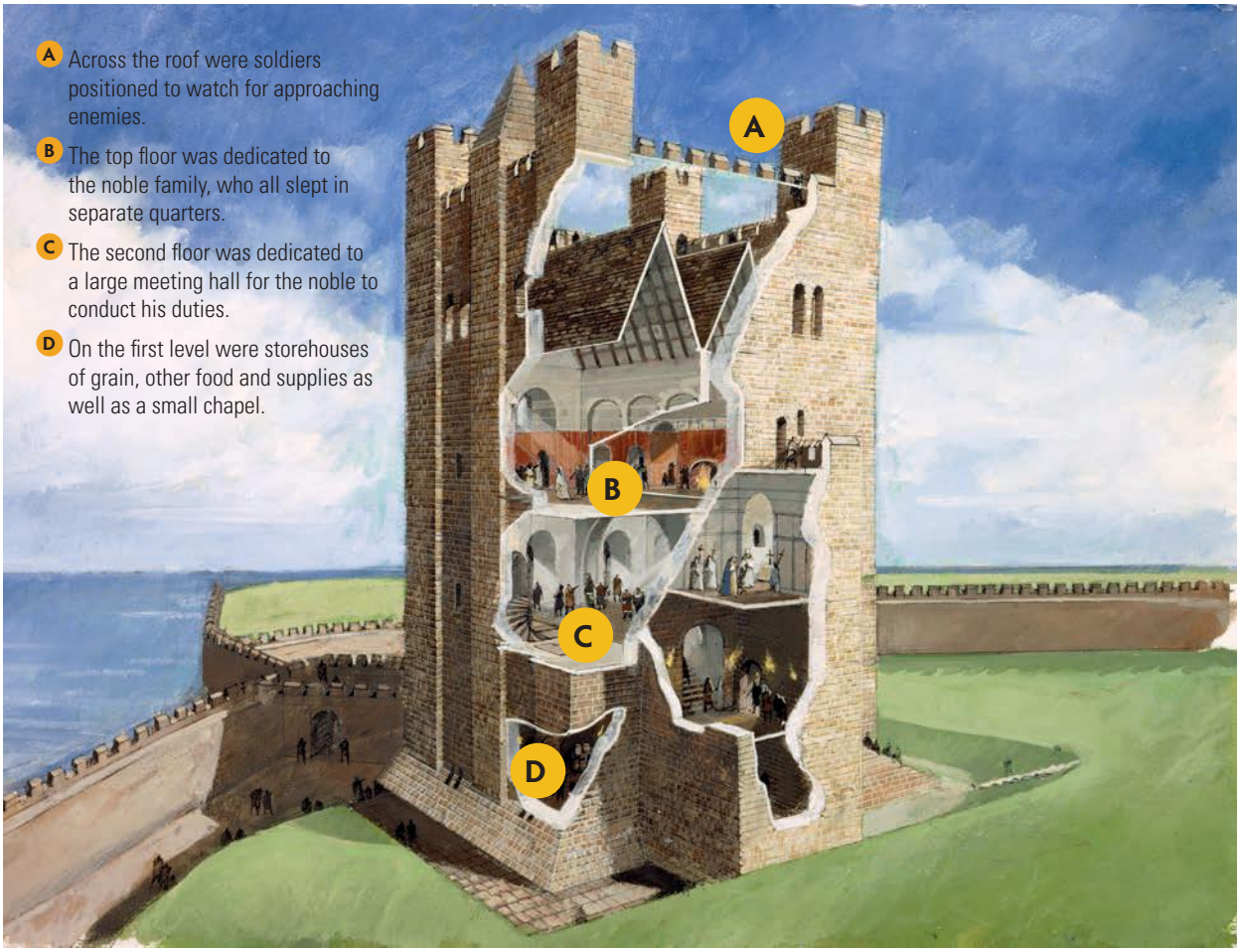
Your response should contain:

- A clear identification of the causes and/or effects relating to the question
- A clear explanation of how the causes are connected to its effects (i.e. how one event or action led to an outcome or consequence)
- Evidence or examples to support this explanation of the relationship between cause and effect.

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What was life like inside a noble's castle?



▲ **Source 1.29** A cutaway drawing of the keep of Scarborough Castle, built between 1159 and 1169 by King Henry II to defend the north of England. The keep was the centre of a castle complex and was used to house the noble family who lived there.

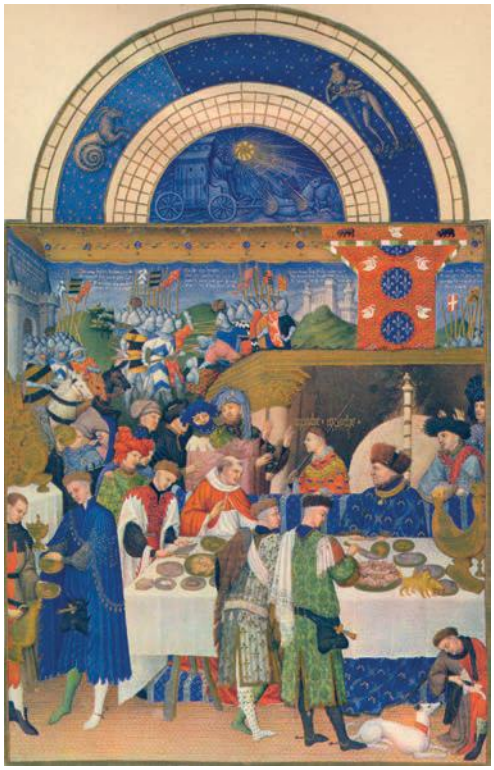
steward servant who supervised both the lord's estate and his household

marshal servant in charge of the noble's hall

groom lower servant in the noble's castle

What will impress you about life in a castle is not so much the gold and silver, but the scale of everything. A man who drinks out of an enamelled gilt-silver cup is rich; but a man whose **steward** drinks out of such a cup is powerful. Most barons have about forty-five men in their household … before a great feast, the **marshal** of the hall will direct a couple of **grooms** to make sure that everyone enters and is seated according to their status. Even the lower ranks … are seated hierarchically.

▲ **Source 1.30** A description of life in a castle, from British historian Ian Mortimer's 2008 book *A Time Traveller's Guide to Medieval England*, p. 159



◄ **Source 1.31** A picture from *The Very Rich Hours of the Duke of Berry*, a medieval manuscript created c.1412 CE by the famous Dutch miniature painters, the Limbourg brothers, showing Jean, Duc de Berry, exchanging gifts at a castle banquet on New Year. A battle scene decorates the walls in the background.

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ACTIVITY 1.12
RESPONDING TO THE SOURCES

1 **Describe** what you notice about life in the castle (in Source 1.29) by making a dot point list of the things that stand out to you.
2 **Examine** Source 1.30, written by historian Ian Mortimer in 2008. **Explain** what it tells you about the way life was organised inside a castle.
3 **Examine** the illuminated manuscript of Duc de Berry's feast in Source 1.31. **Identify** which types of members of medieval society you can see. **Describe** what impression this source gives you of what life was like inside a castle. **Determine** whether or not this would have been the experience for everyone living in a castle.

What was the role of knights in medieval society?

Knights were skilled fighters, riders and the protectors of the nobles, the king and the Church. Long before the medieval period, rulers maintained warriors to help keep themselves in power. The rulers provided food and housing and supplied clothes and weapons to their fighting men. By the time of Charlemagne, these men often rode trained warhorses. This made them more powerful and mobile than foot soldiers, but buying and maintaining these horses was very expensive. Rather than continuing to provide everything, some nobles moved towards making knights subtenants – granting them land in exchange for an oath of loyalty and commitment to come to the lord's aid in times of crisis. Over time, they developed a code of **chivalry** that meant they swore an oath to protect the weak, defend the Church and be kind to women. Most knights had a page, who was a young boy aged 7 to 10 who worked as an apprentice, learning to be a knight.

chivalry code of conduct that knights followed, including respect towards women

WHAT WAS LIFE LIKE FOR KNIGHTS?

The role of the knight was broad. They were used by nobles to protect the land and Church, keep peace and security and, when needed, ride into battle in the service of the lord and king. As the medieval period continued, knights could be broken into two categories – secular and religious.

Secular knights	Religious knights
• were similar to mercenaries as they were specifically employed to protect the nobility and the king.	• were employed to protect the Church's more important sites, such as cathedrals and holy places, and the pilgrims who travelled to them.

▲ **Source 1.32** Types of knights in medieval society

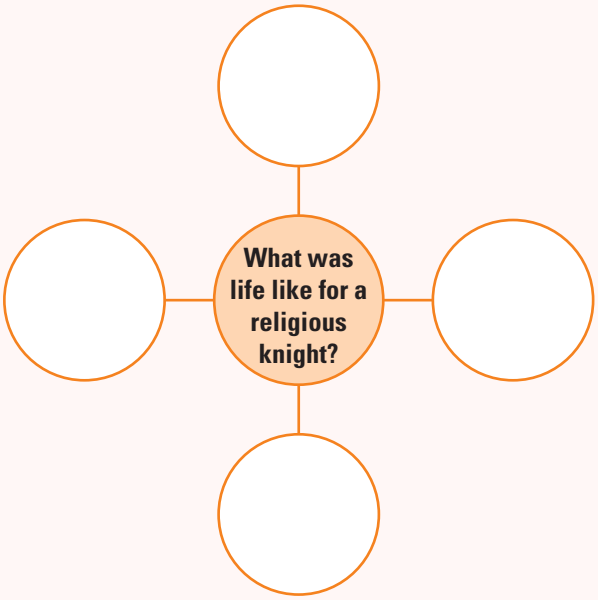
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> … they shun every excess in clothing and food and content themselves with what is necessary. They live as brothers in joyful and sober company, without wives or children … with no personal property whatever, careful to keep the unity of the Spirit in the bond of peace. … They never sit in idleness or wander about aimlessly, but on the rare occasions when they are not on duty, they are always careful to earn their bread by repairing their worn armour and torn clothing, or simply by setting things to order … No inappropriate word, idle deed, unrestrained laugh, not even the slightest whisper or murmur is left uncorrected once it has been detected. They forswear dice and chess and abhor hunting; they take no delight in the ridiculous cruelty of falconry, as is the custom. As for jesters, magicians, bards, troubadours, and jousters, they despise and reject them as so many vanities and unsound deceptions. Their hair is worn short, in conformity with the Apostle's saying, that it is shameful for a man to cultivate flowing locks. Indeed, they seldom wash and never set their hair – content to appear tousled and dusty, bearing the marks of the sun and of their armour.

▲ **Source 1.33** An early twelfth century CE description of an order of knights known as the Templars, from *In Praise of the New Knighthood*, by St Bernard of Clairvaux, a French monk and co-founder of the Knights Templar. The Templars, founded in 1118 CE, were monks as well as knights and wore a white uniform with a red cross on the front and back. Their purpose was to protect the Holy Land from the Muslims.

ACTIVITY 1.13
RESPONDING TO THE SOURCE

1 Based on the information contained in Source 1.33, **determine** whether the Templars were secular knights or religious knights. **Explain** what makes you say this.
2 **Explain** what the motivation of young men who joined the Knights Templar might have been.
3 **Create** a mind map or diagram (see the example on the right) to represent what life was like for a religious knight.

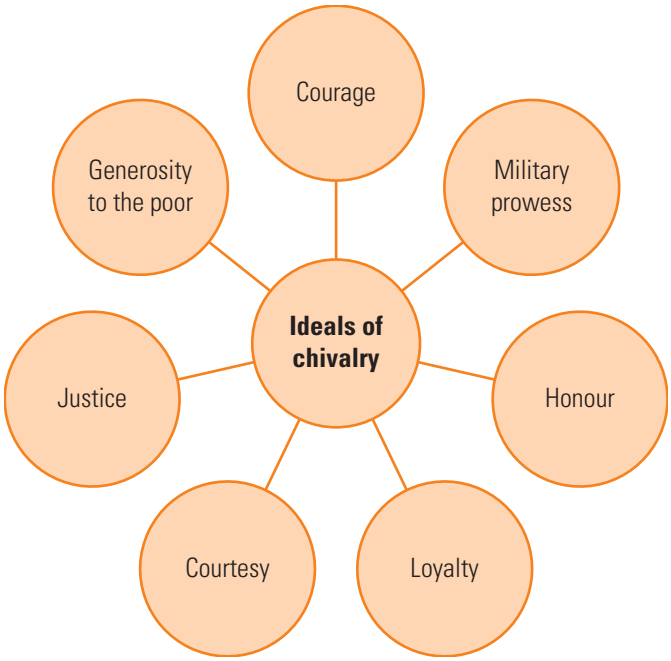


HOW WERE KNIGHTS EXPECTED TO BEHAVE?

The code of chivalry guided the life of a medieval knight. Chivalry was essentially a set of moral standards that a knight would use to conduct their daily life and interactions with people around them. Chivalry demanded that a knight be loyal, courageous and strong in battle with a sound sense of right and wrong. This was supported by excellent manners and concern for the poorer classes in society.

Behaving in a chivalrous manner also allowed the knights to separate themselves from the same poor classes. They were permitted to wear their brightly coloured and decorated armour to stand out in a crowd and establish their higher status in the feudal society.

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▲ **Source 1.34** Some of the ideals associated with chivalrous behaviour

There was a knight, and what a gentleman,
Who, from the moment that he first began,
To ride about the world, loved chivalry,
Truth, honour, freedom and all courtesy.

He fought bravely in his monarch's war,
And in battle he had ridden, no man more,
As well in Christendom as **heathen** places,
And honoured everywhere for worthiness.

Of **mortal** battles he had fought fifteen,
And he'd fought for our faith at **Tramissene**
And always won he widespread fame for prize.
Though so strong and brave, he was very wise

With a temper as mild as a maid.
He never any hurtful thing said,
In all his life, to whatsoever **wight**.
He was a truly perfect, noble knight.

But now, to tell you all of his **array**,
His horses were good, but he was not richly dressed.
Clothing of simple cloth he possessed
Discoloured and stained by his suit of armour;
For he had lately returned from his voyage
And now was going on this pilgrimage.

► **Source 1.35** An excerpt from 'The Knight', part of an epic poem called *The Canterbury Tales*, written by medieval storyteller and poet Geoffrey Chaucer in c.1386 CE (adapted to modern English)

In battle, a knight would wear his heavy armour and a helmet that protected the head and sometimes the whole face. Along with his sword, he would carry a shield with a personal crest (known as a 'charge'), a dagger, an axe and a mace. Each weapon was designed for a specific purpose. Aside from fighting in war, a knight had a good knowledge of song, dance and poetry. They attended the social gatherings of the nobility and practised their skills in tournaments. Put on to entertain the nobility, tournaments often involved contests in which opposing knights would charge at one another on horseback with huge wooden spears. This was known as jousting. The weapons were not intended to kill, but contestants could still be badly injured.

heathen non-Christian

mortal deadly

Tramissene site of Christian crusades against Muslim armies in Algeria

wight medieval term for person

array clothing, armour and weapons



ACTIVITY 1.14
RESPONDING TO THE SOURCES

1. **Identify** the characteristics that Source 1.35 associates with the medieval knight. **Identify** the ideals of chivalry from Source 1.34 that each of these relate to.
2. **Describe** which ideals of chivalry are represented in the images of medieval knights in Source 1.19, Source 1.20 and Source 1.21.
3. Based on Source 1.35, **explain** how knights might have been viewed by others in their communities.
4. With a partner, **discuss** the following question: 'How reliable might Source 1.35 be as evidence of how knights in medieval Europe actually behaved?'

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▲ **Source 1.36** A fourteenth-century depiction of a German knight and poet named Albrecht von Rapperswil (c.1280 CE), from a manuscript called the *Codex Manesse*. The personal charge, or crest, on his shield was a rose.



▲ **Source 1.37** A fourteenth-century depiction of a German knight named Hiltbolt of Schwangau (c.1221–1254 CE), from a manuscript called the *Codex Manesse*

ACTIVITY 1.15
RESPONDING TO THE SOURCES

1 **Describe** the activity that the knights in Source 1.36 are engaging in. **Propose** why this might have been a useful form of exercise for knights in times of peace.

2 **Examine** Source 1.36 and Source 1.37 to suggest what they might reveal about the nature of entertainment in medieval times. **Determine** in what ways it was similar or different to today.

3 All the depictions of knights in this section include an image of their personal coat of arms emblazoned on their shield and clothing. **Explain** why it might have been important for knights to have their unique personal crest emblazoned on their shields when they went into combat.

THINKING DEEPER
HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Change and continuity.

Your response should contain:

- A clear statement about what stayed the same and/or what changed
- Corroborating evidence or examples that show how things stayed the same (i.e. continuity)
- Differing evidence or examples that demonstrate how things changed
- A reason that accounts for this continuity and/or change.

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ACTIVITY 1.16

Create your own medieval knight's shield

The coat of arms on a knight's shield often incorporated unique features (called 'charges') of special significance to them. Imagine you are a medieval knight: what symbols and features might be used to identify you?

In this activity, you will **design** and **create** your own shield, incorporating symbols of significance to you.

1. Use a heraldry website (see the Interactive Textbook for links) or conduct an internet search using terms such as 'heraldic colours', 'heraldic animals' and 'heraldic symbols' to **identify** and **select** up to five symbolic elements to include on your shield.
2. **Create** your coat of arms by either drawing your own shield outline or searching online for a 'heraldry shield template' to find a shield shape you like. You may wish to add annotations to your shield to explain why you chose particular features.
3. When you have created your coat of arms, **explain** the symbolic meaning behind your shield design to a partner or small group.

ACTIVITY 1.17
MAKING THINKING VISIBLE

I used to think … Now I think …

A routine for reflecting on how and why our thinking has changed.

1. Take a minute to **consider** what initial ideas you had about knights in medieval Europe before beginning this section. When you are ready, write down your response to: *I used to think that knights in medieval Europe …*
2. Now, think about how your ideas about knights in medieval Europe have changed as a result of the information and sources you have read. In just a few sentences, write down what you now think. When you are ready, write down your response to: *Now, I think that knights in medieval Europe …*
3. As a whole class, **discuss** how your ideas have changed as a result of what you have learned. What questions do you still have about knights in medieval Europe?

REFLECTING ON YOUR LEARNING 1.2

Reflect on what you have learned in this section:

1. Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the question: 'What was life like for a noble or knight in medieval Europe?'
2. **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'What was life like for people in medieval Europe?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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1

1.3 The roles and relationships of different groups in medieval Europe 2: what was life like for peasants in medieval society?

FOCUS QUESTIONS

- What was the nature of health and medicine in medieval society?
- What was the nature of crime and punishment in medieval society?
- What was life like for a peasant in medieval society?

Most people in medieval society lived in the country, in villages and towns that grew around castles and grand buildings. The regions around these castles and grand buildings, including the villages and towns as well as surrounding farmland, were known as manors and were filled with the knights, vassals, farmers and peasants who worked for the noble, or lord of the manor.

artisan skilled worker who made things or provided services

Craftsmen and **artisans** were essential members of the village. They made the metal swords and armour for the knights. In times of war, they mass-produced the spears, swords and shields the villagers would need to fight. Others baked bread and made the beer that, in most cases, replaced water as the source of hydration in medieval England. Generally, they enjoyed a status that was above peasants because their roles required an education and skill that not everyone possessed.

ACTIVITY 1.18
RESPONDING TO THE SOURCE

1 **Explain** why manor houses, such as the one shown in Source 1.38, would often have been located on top of hills.
2 **Describe** the type of lifestyle that people living in manors such as the one shown in Source 1.38 might have lived and the type of day-to-day activities they might have performed.

What was the nature of health and medicine in medieval society?

It was best not to get sick in medieval Europe. A limited understanding of the human body and disease meant that death from illness was not uncommon. What medieval people did not understand, they often explained as being the power of God. They believed that illness was God's way of purifying the soul, and if death came as a result, it was God's will. Life expectancy was much lower in medieval times than today, with the average life expectancy of a peasant being around 40 years.

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Life for peasants was dirty. Constantly in the fields, working in the hot summers and cold winters, it was difficult to stay clean and healthy. For the wealthier classes, bathing was a way to separate oneself from the poor, so the nobility took great care to appear washed and dressed in clean clothes – which was all taken care of by servants. However, this did not keep away disease.

Medical schools existed in the medieval era and so did doctors. Much of their work was based on the diagnosis of disease by inspecting



▲ **Source 1.38** A present-day artist's reconstruction of a medieval manor and village

1 The lord lived in a large stone building such as a manor house or castle, often situated on the top of a hill for defensive purposes.
2 Peasants would work in the fields, growing crops such as wheat. Ploughs were shared by the peasants of the village and were pulled by oxen. Harvesting was done by hand. Medieval farming techniques divided the fields into three parts: while one field was being harvested, a second field would be planted and a third field would be left fallow, or unplanted, to allow the soil to regain nutrients. A proportion of the harvested grain was required to be given to the lord of the manor.
3 Peasants took the harvested wheat to the mill to be ground into flour, to later be made into bread. Mills could be powered by animals, or by wind or water power. They were required to give some of their grain to the lord as payment for using the mill.
4 Serfs were required to have their bread baked at the lord's bake house and would have to pay a fee to their lord for this service. This fee would be in the form of loaves of bread.
5 Peasants of the village could bring animals such as sheep to the common pasture to graze. Sheep's wool was used to make clothes. Animal droppings were used to fertilise fallow fields.
6 Forest areas around the manor were used by the lord and his family for leisure activities such as hunting wild game, such as bears and boars. Peasants were not allowed to hunt in the lord's forest.
7 The orchard of a medieval manor would contain apple or pear trees, from which cider could be made.
8 Peasants' houses were clustered together in the village. Peasants had to construct their own houses, which were typically made from wooden frames covered with a mixture of mud, straw and manure.
9 The village would have a church in a central location, where ceremonies such as marriages and funerals would occur, as well as regular religious services.

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trepanning (or trepanation) surgical procedure in which a hole is drilled into a person's skull

clergy ordained member of the Christian Church, such as a priest

the urine and faeces of the infected patient. Major surgeries existed, such as tooth extractions, amputations and even puncturing the skull (a process known as **trepanning**) to relieve pressure using alcohol to sterilise the wound and relieve pain. However, for the poor in dirty villages, cities and farms, poor health was a fact of life. In most cases, the populations in these places lived very close together and disease could spread easily. The lack of sewerage systems meant human waste was never far away and airborne illnesses could spread quickly among peasants. Those who could afford medical attention could have the colour of their urine examined for an imbalance in their bodily fluids or consult with astrologers who would study the position of the planets, as this was believed to be a cause of illness. For those who could not afford medical attention, local healers would use a variety of herbs and plant-based mixtures to treat the sick. Deliberate bleeding was often used to expel impurities. But for most of the peasantry, they relied heavily on prayer and the holy touch of the **clergy** and God to save them from death. The stories of those who did so and survived reinforced the power of the Church and religion.



▲ **Source 1.39** A depiction of a fourteenth-century CE medieval surgeon performing a trepanning operation on a patient's skull, from an 1895 book titled *Social England*, by British author and journalist Henry Duff Traill.



◄ **Source 1.40** A doctor seeks to cure an eye infection with a sharp instrument, from a twelfth-century CE manuscript from England or Northern France.



▲ **Source 1.41** A French manuscript of Giovanni Boccaccio's *The Decameron*, c.1353 CE, illustrating the use of leeches as medical treatment

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▲ **Source 1.42** Surgical instruments depicted in the manuscript of *Al-Tasrif (The Method of Medicine)* by Abulcasis (also known as Abū al-Qāsim al-Zahrāwi), c.1213–23 CE. He was considered one of the greatest surgeons of the Middle Ages and invented many techniques and surgical instruments, some of which are still used today.

ACTIVITY 1.19
RESPONDING TO THE SOURCES

1 **Identify** what kind of medical procedures are being undertaken in Sources 1.39, 1.40 and 1.41. For each of these, **propose** how successful you expect these procedures would be in healing the patient. **Describe** what impact each of these might have had on the patient if they survived.
2 **Explain** what Sources 1.39 to 1.42 might tell you about the overall approach to medicine in medieval Europe.
3 **Select** one of the procedures shown in Source 1.39, 1.40 and 1.41, or **conduct** some research, to **identify** another medical treatment or cure that was common in medieval times. **Create** a short advertisement (30–60 seconds duration) to 'sell' this cure to your audience as a new ground-breaking medical treatment. You may wish to film your advertisement to present to your class.

What was the nature of crime and punishment in medieval society?

Various systems of crime and punishment have existed since the beginning of human civilisation. The ancient Mesopotamians introduced the concept of 'an eye for an eye' as a means of justice as early as Hammurabi's reign (1792–1750 BCE). In medieval Europe, poverty dominated the lives of the majority of the population and so theft was common. However, crime in general was rare compared to modern times. Once an accusation had been made, it was usually the local noble or knight who oversaw the 'trial'. In some parts of Europe, the accused would endure a 'trial by ordeal' where they were expected to hold a burning hot rod of metal in their bare hands. Then, after a few days, if their hand showed signs that it was healing, they were pronounced innocent. If not … guilty.

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treason crime of betraying or participating in a war against one's country or the state authority to who one owes allegiance, such as the king

monarchy country that has a royal family, and the head of the royal family as its ruler

Charlemagne introduced the concept of 'trial by panel', where the evidence was heard in front of a group of educated men who then determined guilt. Sometimes knights and nobles were subjected to trial by combat. If they were able to win a fight to the death, they could be proven innocent. In some cases, a 'champion' could be nominated to fight on the defendant's behalf.

Murder, **treason** and witchcraft lay at the more serious end of the crime spectrum. However, as there was no police force to speak of, most illegal acts were punished brutally to deter further crimes. Theft was treated with extra work, physical punishment and, at worst, the loss of a hand. Serious acts like treason against the **monarchy** were punished with the accused being hung upside down, cut open while still alive, and then having all four limbs removed. Such punishments were conducted in public. Those accused of witchcraft were asked to repent their sins and accept the teachings of Christianity. If they did not repent, they were tied to a wooden pole above a log fire and burned alive. This also took place in public view.

ACTIVITY 1.20

Group-based research task

Break into groups of two or three and choose a medieval crime to research. Copy and complete the table below. Then present your findings to your classmates.

Crime	Definition	Punishment in medieval times	Purpose of the punishment
Petty theft			
Murder			
Arson			
Poaching			
Witchcraft			
Heresy			
Stealing food or crops			
Vagrancy			

When you have filled in the table, complete the following tasks:

1 **Analyse** the list of acts considered a crime. **Explain** anything that surprises you about the acts.
2 **Explain** what you notice about the types of punishments. **Describe** the types of punishments.
3 **Explain** what the purpose of medieval punishments might have been and the role they played in society.
4 Now imagine yourself as a witness to a trial for one of the crimes listed above. **Create** a diary entry that describes the experience from accusation to trial, and then to punishment. You may wish to conduct some additional research to support your response.



THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Empathy.

Your response should contain:

- Language that shows that you understand the values, beliefs, experiences and emotions of people from the past
- Consideration of how these values, beliefs, experiences and emotions align with or differ from your own
- Explanation of how the origin and context of the source may account for similarities or differences with your own experience.

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What was life like for a peasant in medieval society?

Peasants were at the bottom of the social hierarchy in medieval Europe. There were two main types of peasants in medieval society: serfs, who were legally tied to their lord's land and obliged to work for the lord; and freemen, who had more rights than serfs and paid rent to the lord in exchange for the right to use the lord's land. They did almost all the hard physical work, tending the fields and farms of the noble to grow food for the village and for the noble to sell and send to armies fighting abroad.



▲ **Source 1.43** Medieval illustration of men harvesting wheat, from an English manuscript called the *Queen Mary Psalter*, c.1310 CE

The Church is a single body, but society is divided into three groups, for human law distinguishes two classes. Nobles and serfs, indeed, are not ruled by the same laws … The nobles are the warriors and the protectors of the churches. They are the defenders of the people, of both great and small … The other class is that of the serfs. This unfortunate group possesses nothing except what it produces by its own labour … The serfs provide money, clothes, and food, for the rest; no free man could exist without serfs … the serf never sees an end to his tears and his sighs.

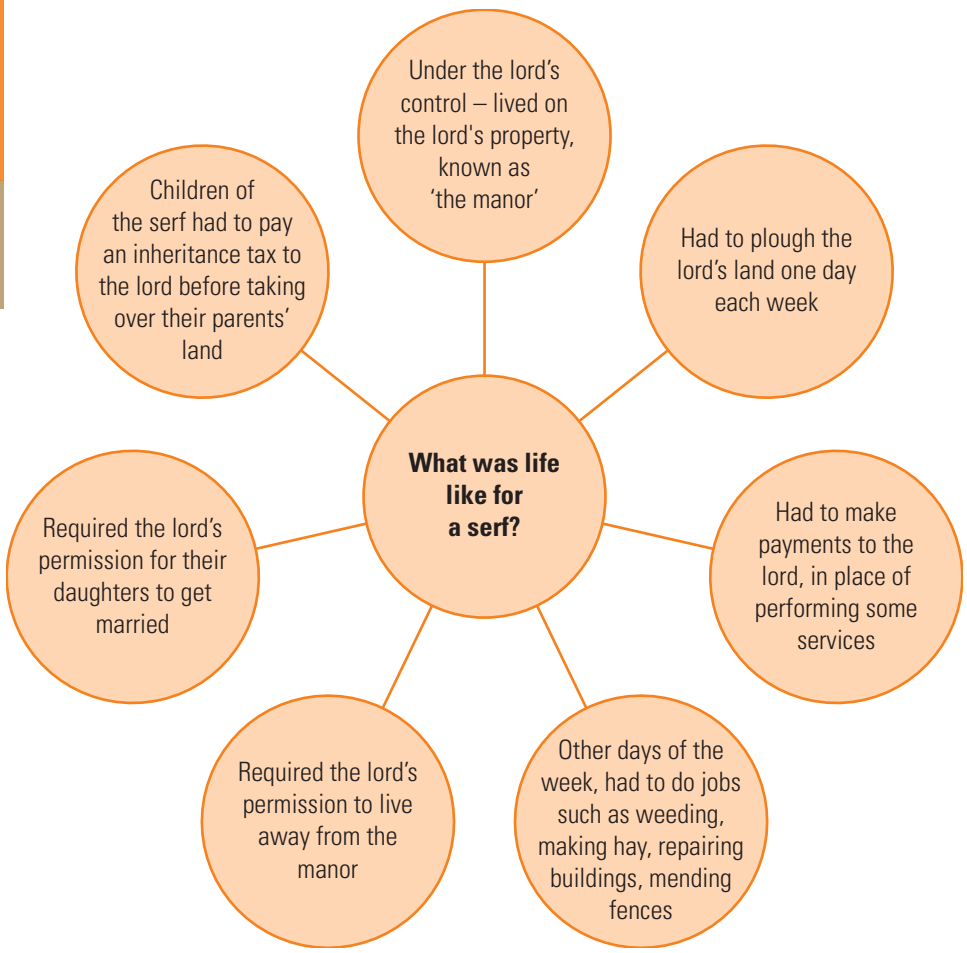
God's house, which we think of as one, is thus divided into three; some pray, others fight, and yet others work. The three groups, which coexist, cannot be separated; the services provided by one support the work of the other two; each contributes to the whole. These three groups are united, and it is because of this that the rule of law has been able to triumph, and the world has been able to enjoy peace.

▲ **Source 1.44** A description of medieval society by the French Bishop Adalbero of Laon, writing around the year 1020 CE

ACTIVITY 1.21
RESPONDING TO THE SOURCES

1. **Examine** the image in Source 1.43. **Identify** which group of the feudal pyramid (refer to Source 1.17 if needed) this image represents. **Explain** what makes you say this.
2. **Explain** what you think may be occurring in the scene depicted in Source 1.43.
3. **Examine** the descriptions of the three 'orders,' or groups, in medieval society in Source 1.44. **Compare** life for a peasant (serf) to members of the nobility or the Church. Based on the information in these sources, **decide** whether or not medieval society was fair for all people involved.

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▲ **Source 1.45** What life was like for a serf

Under the system known as the manor system, serfs were tied to their lord's land (known as the manor) for life, unable to leave the manor without permission, and were required to work for the lord of the manor who owned the land. It was a small step up from slavery. They were paid very little, if at all, but in return they were provided with food, shelter and protection.

For both serfs and freemen, daily life was hard. They worked in the fields all day, slept on dirt floors in the few clothes they owned, and shared their houses with the farm animals they tended. Peasant life was not all work; Sunday was reserved as a day of rest and worship, with some leisure time. In times of war, the peasants could be called upon by their lord to fight.



▲ **Source 1.46** Scenes of peasant life (ploughing, harrowing, and sowing) from an English medieval manuscript known as *The Luttrell Psalter*, created in c.1300–1340 CE by Sir Geoffrey Luttrell, lord of the manor of Irnham in Lincolnshire



▲ **Source 1.47** Scenes of peasant life (reaping, carrying and carting) from an English medieval manuscript known as *The Luttrell Psalter*, created in c.1300–1340 CE by Sir Geoffrey Luttrell, lord of the manor of Irnham in Lincolnshire

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It is the custom in England, as in other countries, for the nobility to have great power over the common people, who are their serfs. This means that they are bound by law and custom to plough the fields of their masters, harvest the corn, gather it into barns, and separate the grain; they must also mow and carry home the hay, cut and collect wood, and perform all manner of tasks of this kind.

▲ **Source 1.48** A description written c.1395 CE by the French nobleman and historian Jean Froissart, describing the relationship between the nobility and the serfs in England. Froissart lived in England for many years and worked for the monarchy.

Why are those whom we call lords, masters over us? … they treat us like animals … They are dressed in velvet and furs, while we wear only cloth. They have wine, and spices and good bread, while we have rye bread and water. They have fine houses and manors, and we have to brave the wind and rain as we toil in the fields. It is by the sweat of our brows that they maintain their high state. We are called serfs, and we are beaten if we do not perform our task …

▲ **Source 1.49** A description of the condition of serfs in medieval England, from a 1395 CE speech by a priest named John Ball. In his speeches, John Ball attempted to raise awareness of social inequality.



◄ **Source 1.50** A woodcut made in c.1400–1522 CE, depicting German farmers and their lord

ACTIVITY 1.22
RESPONDING TO THE SOURCES

1 **Analyse** and **evaluate** Sources 1.46 to 1.50 to complete the table below.

Source	Describe the source – What is it? Who is it by? When was it created?	Analyse – What does it say or show?	Evaluate – What impression does it give of what daily life was like for peasants in medieval Europe?
1.46			
1.47			
1.48			
1.49			
1.50			

2 **Develop** a paragraph in response to the question: 'What was life like for peasants in medieval Europe?' Try to refer to evidence from Sources 1.43 to 1.50 in your paragraph.

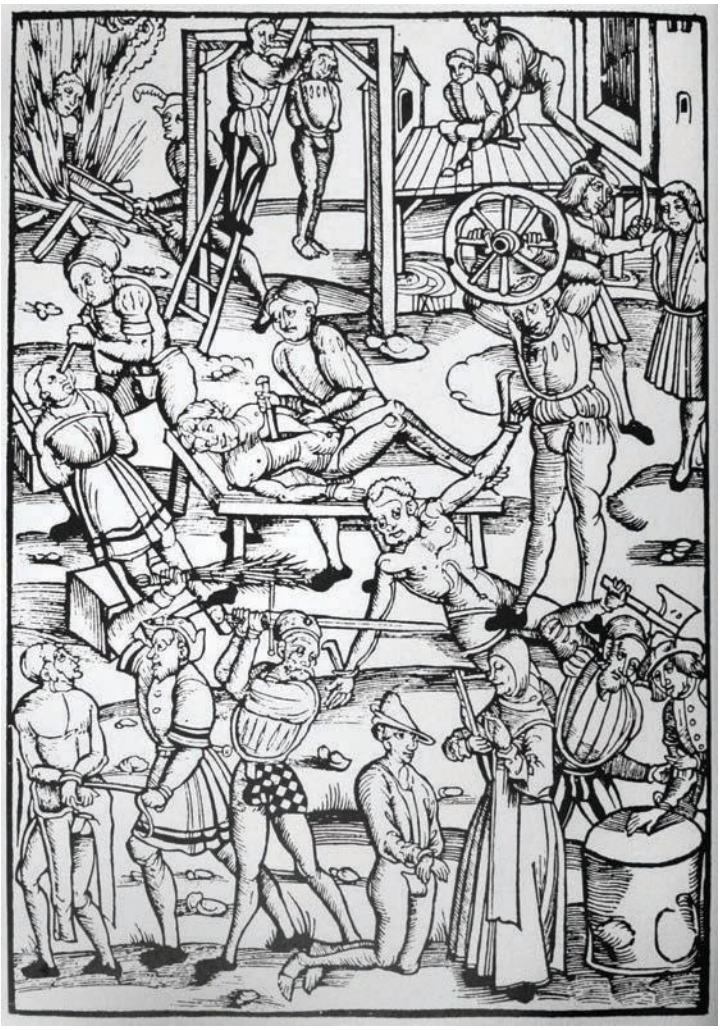
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ACTIVITY 1.23
MAKING THINKING VISIBLE

Colour – symbol – image

This thinking routine encourages you to distil ideas and present them in a new form, and to justify the reasons for your choices. It can be done on computer or on paper.

Colour	Symbol	Image
What colour best represents life for a peasant in medieval Europe? (place in the box below)	What symbol best represents life for a peasant in medieval Europe? (place in the box below)	What image best represents life for a peasant in medieval Europe? (place in the box below)
Why did you choose this colour?	Why did you choose this symbol?	Why did you choose this image?



◄ **Source 1.51** A twentieth-century CE artist's representation of types of punishment used in medieval Europe. How many forms of punishment can you identify in this image?

REFLECTING ON YOUR LEARNING 1.3

Reflect on what you have learned in this section:

1. Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the question: 'What was life like for people such as peasants in medieval society?'
2. **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'What was life like for people in medieval Europe?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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1

1.4 The roles and relationships of different groups in medieval Europe 3: what was life like for women in medieval society?

FOCUS QUESTIONS

- What was life like for noble and peasant women?
- What kind of occupations could women perform?
- When did medieval women marry?
- How did religious beliefs affect attitudes towards women?

What was life like for noble women?

For women of the medieval era, their quality of life depended heavily on their place in the feudal pyramid. Women who married nobility would have a range of responsibilities as 'Lady of the Manor', managing the large household, including the kitchens, the farms and the castle. She had to check the bakehouse to oversee the baking of bread, beer, butter and cheese.

She had to manage the house staff to ensure there was enough food to last through the winter. As noble women had servants to look after their children and perform domestic duties such as cleaning and cooking, they had more leisure time than other women and could partake in activities such as hunting, dancing, listening to music and playing games such as chess.



▲ **Source 1.52** A French medieval illustration from the *Letter of Othea to Hector*, by Christine de Pizan, created c.1407 CE. It depicts the goddess Diana taking aim with a bow while another woman beats the bushes to drive game (wild animals) into the open. Other women blow the hunting horn and manage the dogs. While this is a mythical scene, it provides an insight into the techniques used in the sport of hunting, which was commonly participated in by aristocratic women.



◄ **Source 1.53** A painting called *Masquerade at the French Court* depicting a marriage celebration in 1393 CE organised by the queen of France, Isabeau of Bavaria, for one of her ladies-in-waiting

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▲ **Source 1.54** A painting from a c.1456 CE French novel titled *Jean de Saintré*, by Antoine de La Sale, who was an author, royal tutor, soldier and a judge at medieval tournaments. It depicts a jousting tournament in c.1350 CE, showing noblewomen spectating from the stands



TABLE SERVICE OF A LADY OF QUALITY.
Fac-simile of a miniature from the *Romance of Renaud de Montauban*, a ms. of fifteenth century.
Bibl. de l'Arsenal.

▲ **Source 1.55** A later copy of an image from a fifteenth-century manuscript titled *Romance de Renaud de Montauban* depicting a noblewoman and members of her household being waited on by their servants

ACTIVITY 1.24
RESPONDING TO THE SOURCES

Describe the type of lifestyle that the women depicted in Sources 1.52 to 1.55 appear to have experienced.

What was life like for peasant women?

Peasant women were required to care for their children, prepare food for the family, sew clothes, and care for the household's animals and livestock. During the harvest and busy times of the year, women laboured alongside the men, ploughing fields, tending to animals and harvesting grain.



▲ **Source 1.56** An image of medieval women embroidering (decorating) fabrics, taken from a manuscript called *De Claris Mulieribus* by Giovanni Boccaccio in c.1361 CE



▲ **Source 1.57** A thirteenth-century illustration of a peasant woman milking a cow, from an English *Bestiary*, a manuscript that collected illustrations and descriptions of various real and mythical creatures. It was a luxury item produced to be enjoyed by a wealthy family.

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First in the morning, when you wake up … sweep your house, tidy up your dish-board, and set all things in good order within your house: milk your cow, suckle your calves, strain the milk, wake up your children, organise them, make your husband's breakfast, dinner, supper, and for your children and servants, and take your place with them …

You must make butter, and cheese, feed your pigs both morning and evening, feed the chickens in the morning …

It is convenient for a husband to have sheep of his own, for many purposes, and then may his wife use some of the wool, to make her husband and herself some clothes …

It is a wife's occupation to prepare corn, to make malt, to wash and wring, to make hay, shear grain, and when needed to help her husband to fill the muck cart or dung cart, drive the plough, to load hay, corn and so on. And to go or ride to market, to sell butter, cheese, milk, eggs, chickens, capons, hens, pigs, geese, and all manner of grain. And also, to buy everything necessary for the household, and to account for the cost of everything to her husband, what she has received, and what she has paid.

▲ **Source 1.58** A description of the work of a farmer's wife in medieval times, translated into modern English from a book called the *Book of Husbandry* by Anthony Fitzherbert, written c.1534 CE

Margery, the widow, holds 24 acres and she pays 3s every year … From Michaelmas to the Feast of St Peter she must plough half an acre every week … And from the Feast of St John the Baptist until August she must perform manual service 3 days every week … She shall mow the lord's meadow for at least 4 days … And she must lift the lord's hay for at least 4 days … She shall weed 2 days … And from the Feast of St Peter until Michaelmas she must perform manual service with a man 5 days a week … And furthermore, she performs 8 boon works in autumn … And she must plough one day, fed by the master with half a plough … And she shall give eggs at Easter at will.

▲ **Source 1.59** An extract from the records of a manor at Frocester, England, c.1266 CE, describing the work a widowed woman was required to do for the lord of the manor

ACTIVITY 1.25
RESPONDING TO THE SOURCES

1 Using the information from Sources 1.56 to 1.59, **identify** five tasks that were performed by peasant women in medieval Europe.
2 **Describe** the type of lifestyle that the women depicted in Sources 1.57, 1.58, 1.59 appear to have experienced. Support your answer with evidence from the sources.

What kind of occupations could women perform?

Women in larger towns were known to take on jobs such as opening a shop or a market stall without permission from their husbands. Evidence has been found in the taxation records of Paris in the thirteenth century that women worked in many trades, as schoolteachers and doctors, as chemists and in the arts. Some women rose to powerful positions in the Church as **abbesses** of convents.

abbess female head in charge of a community of nuns in a convent or nunnery

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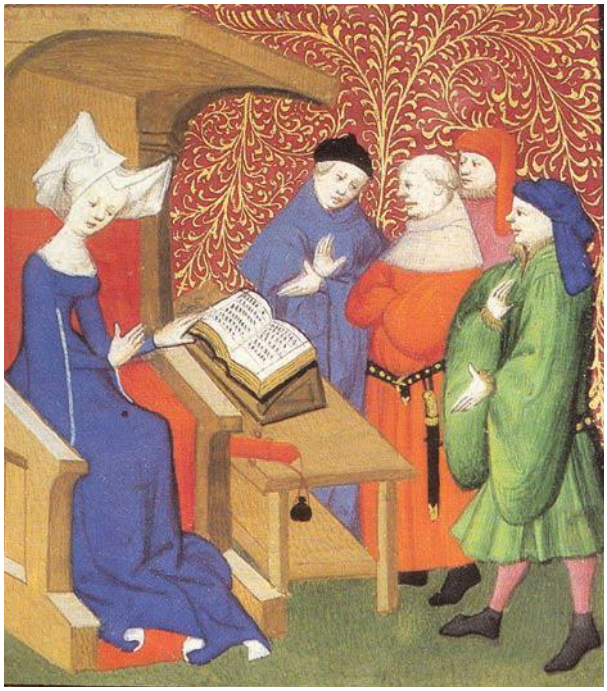
patriarchy a system of society or government controlled by men

A professional woman who rose to great prominence in medieval Europe was the writer Christine de Pizan. Born in Italy, de Pizan spent most of her life in France, where she forged a career as a writer of romantic ballads, literary critiques, poetry, biography and social commentary, including her famous *City of Ladies*.

Her works, which critiqued the **patriarchy** of her time and engaged with issues of women's oppression, women's accomplishments and women's rights, are seen by some to be among the earliest known examples of feminist writings. De Pizan also has the distinction of being the first known woman of the medieval period to earn a living entirely from writing.

> Should I also tell you whether a woman's nature is clever and quick enough to learn speculative sciences as well as to discover them, and likewise the manual arts? I assure you that women are equally well-suited and skilled to carry them out and to put them to sophisticated use once they have learned them.

▲ **Source 1.60** An excerpt from a speech from a fifteenth-century book called *The Book of the City of Ladies*, by Christine de Pizan, a poet at the court of Charles VI of France



▲ **Source 1.61** An illustration from *The Book of the City of Ladies*, a medieval manuscript from c.1413 CE, depicting the French poet Christine de Pizan giving a lecture to a group of men. Christine de Pizan was the first known female professional writer in medieval Europe.

ACTIVITY 1.26
RESPONDING TO THE SOURCES

1. **Interpret** the main idea of Christine de Pizan's speech in Source 1.60. **Explain** how she perceives the place of women in medieval society in comparison to men.
2. **Describe** the type of work that Christine de Pizan appears to be performing in Source 1.61. **Explain** whether or not you think this might have been a common profession for a woman in medieval times.

When did medieval women marry?

subordinate of a lower status or position

aristocrat member of nobility (like the Royal Family in Britain)

Growing up, girls from noble as well as non-noble families were **subordinate** to their fathers and once married, they followed the orders of their husbands. If their husband was cruel and beat them, they were unable to complain. Most marriages for **aristocratic** women were arranged early in infancy and they were married by the time they were 12 or 14 years old. Women who were not married by their teenage years would likely have been expected to become nuns and live the rest of their life in a religious convent.

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Women were encouraged to produce as many children as possible and by the age of 25, they might have had as many as five children, though it is likely that not all of them would have survived. Childbirth was quite a dangerous experience, being a common cause of death among women. Complications during birth that are easily fixed today were much more likely to be fatal in medieval times.

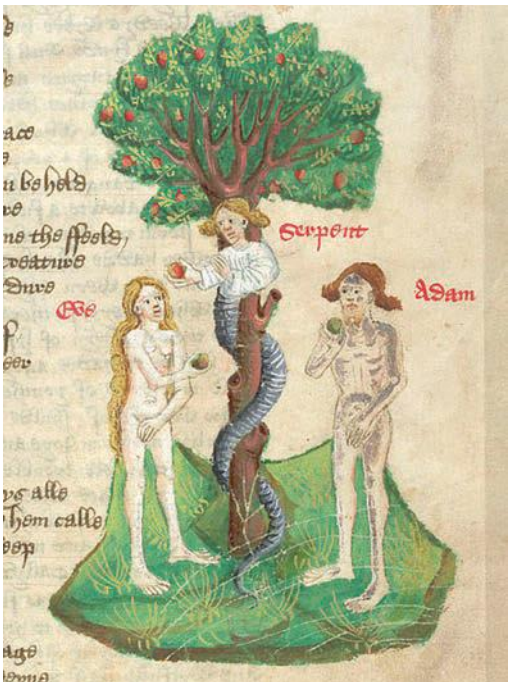
How did religious beliefs affect attitudes towards women?

Much of this attitude towards women was due to an interpretation of some passages in the **Bible** that emphasised the authority and superiority of men over women. An early passage in the Bible tells the story of the first man and woman, Adam and Eve, who God is said to have put on Earth. Eve tempts Adam to defy God's wishes, and both are punished as a result. It is easy to see that despite the important work or status of women in the medieval world, biblical texts and men's attitudes towards them were supported by the all-powerful Church to ensure they remained second-class citizens.

Bible collection of sacred writings of the Christian religion

> Of Mother Eve who, by her wickedness, First brought mankind to all his wretchedness, For which Lord Jesus Christ himself was slain, who, with his heart's blood, saved us thus again. Lo here, expressly of woman, may you find That woman was the ruin of mankind.

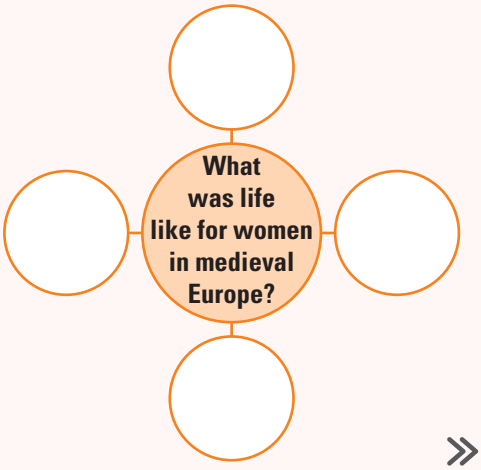
▲ **Source 1.62** Chaucer's *The Wife of Bath's Prologue*, written in c.1386 CE, sums up common attitudes to women in the medieval period.



▲ **Source 1.63** An image from a medieval manuscript called *The Fall of Princes*, created by a Benedictine monk named John Lydgate in c.1431–1438 CE

ACTIVITY 1.27
RESPONDING TO THE SOURCES

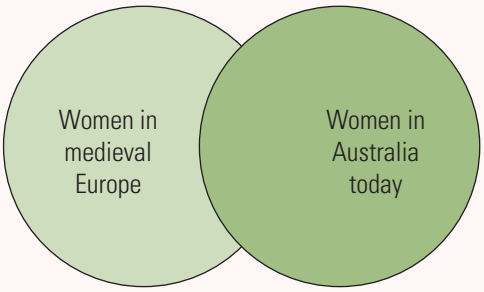
1. Use Sources 1.62 and 1.63 to **explain** how religious beliefs might have affected society's views of women in medieval Europe.
2. In pairs or small groups, use the information and sources from this section to **create** a mind map to respond to the question: 'What was life like for women in medieval Europe?'



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3 **Compare** the experience of women in medieval Europe with women in Australia today. **Identify** the similarities and differences. **Create** a Venn diagram to represent your ideas.



ACTIVITY 1.28
MAKING THINKING VISIBLE

Headlines routine

This routine draws on the idea of newspaper-type headlines as a vehicle for summing up and capturing the essence of an event, idea, concept, topic, etc. It can be done on computer or on paper.

1 Write a headline for a medieval European magazine/newspaper article that captures the most important aspect of what life was like for a woman. Once finished, share these headlines with a partner, then with your class.
   - You may wish to use one of the two online headline-generating tools below to bring your headlines to life. Take a screen clip or save the image to your class notes.
   - Website tool 1: https://cambridge.edu.au/redirect/9589
   - Website tool 2: https://cambridge.edu.au/redirect/9590

2 If you wish to extend yourself further, **create** the front cover of the magazine/newspaper article on life for women in medieval Europe. Your front cover should include:
   - Your headline
   - An image
   - Three interesting dot points identifying key features of life for women in medieval Europe.

REFLECTING ON YOUR LEARNING 1.4

Reflect on what you have learned in this section:

1 Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the question: 'What was life like for women in medieval society?'
2 **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'What was life like for people in medieval Europe?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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1

1.5 The experiences and perspectives of rulers and of subject peoples in medieval Europe: what effect did religion have on the lives of people in medieval Europe?

FOCUS QUESTIONS

- How powerful was the Church in medieval Europe?
- How were ordinary people's lives affected by the presence of the Church in medieval society?
- What was life like for a medieval monk or nun?

How powerful was the Church in medieval Europe?

The Christian Church enjoyed a special place in the feudal order of medieval society. Most medieval kings and queens claimed their throne by **divine right**, which meant God had specifically chosen them. The belief in God and the Christian faith went from the top to the bottom of society and guided almost every aspect of medieval life. From kings to peasants, the desire to live a **pious** and good life according to Christian teachings was driven by the need to get into heaven after death.

The Church and religion were everywhere, and the Church's authority went beyond the boundaries set by kings and countries. Such was its power that in 1041 CE, in an era of almost constant war between small feudal states, the Church enforced the 'Truce of God' that banned fighting from Thursday to Sunday. Anyone who broke this rule would be banned from practising religion, and given that religion guided the lives of everyone in the feudal society, few dared to risk a trip to hell rather than heaven. Those who did not obey the laws of the Church or dared challenge it could be labelled a '**heretic**' and brutally punished. From the eleventh century on, thousands of people were burned at the stake as heretics, in groups of as many as 200 at a time.

The leadership of the Church, headed by the pope, was often wealthier and more powerful than most European kings. They were exempt from most royal taxes, and owned a significant percentage of land across Europe that they operated under the feudal system, with peasants providing free labour. Pope Innocent III was so powerful that he advised several European kings on how to run their own affairs, arranged marriages between the children of various monarchs, and forced separations of these when they didn't suit him! This kind of power and authority meant that the teachings of the Church were the same no matter where one travelled in Europe. A priest could conduct a religious service, known as Mass, in any country and it would be understood.

divine right the idea that kings derive their right to rule directly from God and do not have to answer to those below them

pious lives a devoutly religious life

heretic Christian who promoted religious opinions or teachings at odds with the official Church teachings

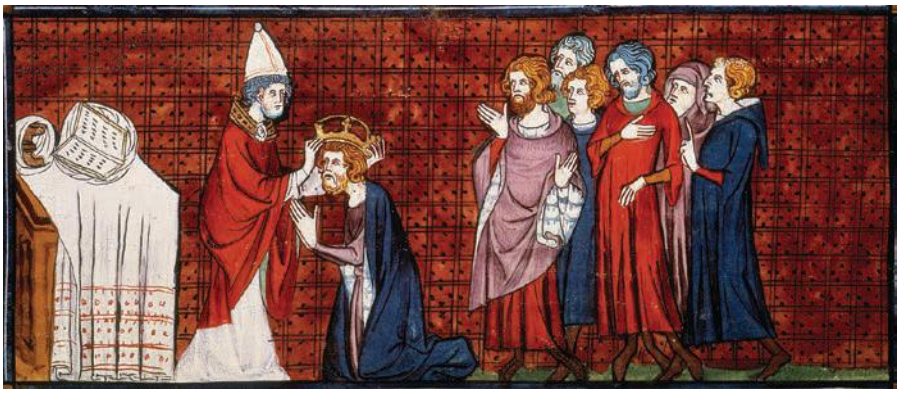
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◄ **Source 1.64** A copy of a medieval depiction from c.875 CE of King Charles the Bald on his throne



▲ **Source 1.65** A fourteenth-century illustration from a medieval manuscript called *The Grandes Chroniques de France* depicting the Frankish King Charlemagne being crowned 'Emperor of the Romans' by Pope Leo III in 800 CE

ACTIVITY 1.29
RESPONDING TO THE SOURCES

1. **Interpret** the meaning of the hand that appears at the top of Source 1.64. **Identify** whose hand this was meant to be. **Describe** what message King Charles the Bald might have been trying to convey to those who saw this image.
2. **Analyse** how the figures in the foreground of Source 1.65 are depicted. **Describe** what the relationship between the two men appears to be. **Consider** their relative body language and physical posture in your response.
3. **Explain** how the image in Source 1.65 might provide an insight into the relationship between the monarchy and the Church in medieval Europe from 800 CE on.
4. **Identify** one quality or feature of the image in Source 1.65 that makes you think it should be considered a reliable historical source for the relationship between the Church and the monarchy in medieval Europe from 800 CE on.
5. **Identify** one quality or feature of the image in Source 1.65 that might reduce or limit its reliability as a historical source for the relationship between the Church and monarchy from 800 CE on.

How were ordinary people's lives affected by the presence of the Church in medieval society?

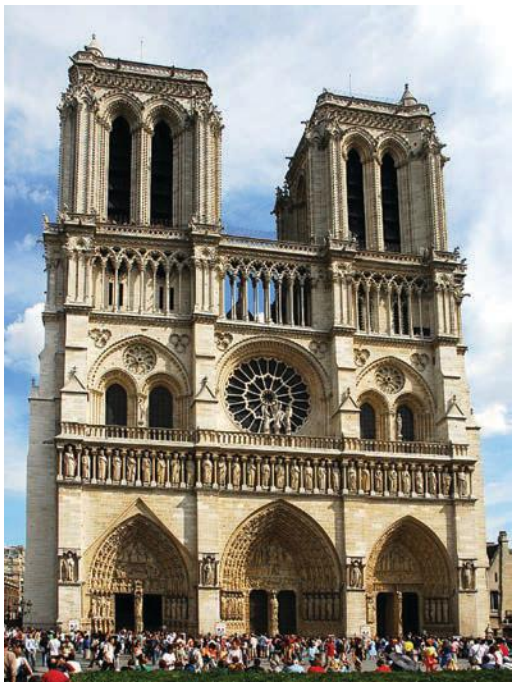
cathedral large church and place of worship, which was presided over by a bishop; usually in the centre of town to remind the townsfolk of the power of religion

The clergy were important members of medieval society. The clergy included the bishop who led religious practice in the large **cathedrals**, and the monks, nuns and priests who helped the poor. In most medieval societies, the clergy were divided into upper and lower categories. The upper clergy were usually the sons of wealthy nobles and they enjoyed an extremely comfortable life as the leaders of large churches and congregations. The highest members of the clergy were in close contact with the king and nobility. The lower clergy, such as priests, did the most important work in the village, working face to face with the peasants, the poor and the downtrodden, helping them in their daily lives, baptising babies, marrying young lovers, tending to the sick and burying the dead.

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ACTIVITY 1.30
RESPONDING TO THE SOURCE

The building shown in Source 1.66 (you can scan the QR code to watch a video) is the Cathedral of Notre-Dame de Paris, which was completed in c.1260 CE. **Explain** how the presence of church buildings such as this around medieval Europe might have reinforced the power and status of the Church.



▲ **Source 1.66** A present-day photograph of the cathedral of Notre-Dame de Paris, which was completed in around 1260 CE

Priests were not allowed to marry and were expected to devote their lives to God. In times of war, they blessed the soldiers before battle and tended their wounds. They were usually the only members of the village that could read and write, so they spent considerable time reading the Christian Bible and explaining its teachings to the community. For the peasants who worked six days out of seven, priests provided education, inspiration and a connection to the outside world. Priests also had the power to forgive people's sins so they could get to heaven.

Peasants were required to pay a **tithe** to the Church. This was a tax, normally in produce, of one-10th of whatever the peasant produced on their own land. Peasants were made to believe that a failure to pay these tithes would prevent their souls from going to heaven when they died. Given that the Church did not then need to pay this tax to the king, this contributed to the Church's wealth.

In medieval times, people believed that they might have their sins forgiven, or their illnesses cured, by undertaking a **pilgrimage** to a holy site, known as a shrine. Depending on the dedication of the pilgrim, these pilgrimages might be to a nearby shrine or as far away as the **Holy Land**. In addition to the Holy Land, popular destinations for medieval pilgrims included the tomb of Thomas Becket at Canterbury Cathedral in England and the Cathedral of Santiago de Compostela in Spain. Upon arriving at these pilgrimage sites, pilgrims may have had the opportunity to see or even touch a religious **relic** held there, such as the bones or clothes of a saint. This was believed to bring the pilgrim closer to God and improve their chance of going to heaven.

▲ **Source 1.66** The cathedral of Notre-Dame de Paris

tithe one-10th of annual produce or earnings, paid as a tax for the support of the Church and clergy

pilgrimage journey to a sacred place, undertaken by a person as an act of religious devotion

Holy Land region between the Jordan River and Mediterranean Sea, known today as Israel and Palestine, that includes the city of Jerusalem and is of central importance to Christianity, Judaism and Islam

relic either some part of the physical remains (a body part) of a saint, or the personal possessions of a saint, preserved and displayed in a church for the purpose of veneration

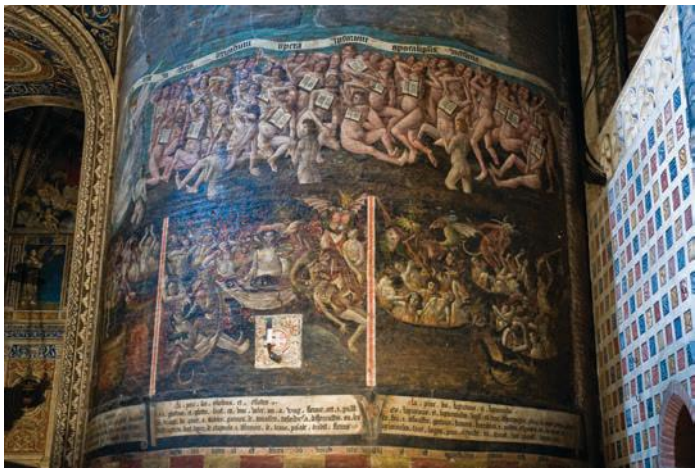
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▲ **Source 1.67** A painting known as a 'Doom Painting', from the twelfth century CE, showing the purgatorial ladder, or *Ladder of Souls*. This painting is on the wall of the Church of St Peter and Paul, in Chaldon, Surrey, England.



▲ **Source 1.68** A fifteenth-century CE fresco depicting *The Saved at the Last Judgement*, from the walls of the Cathedral of Saint Cecilia, Albi, France



▲ **Source 1.69** A twelfth-century CE illustration depicting hell, from the *Hortus deliciarum* (meaning 'Garden of delights'), by the French nun Herrad of Landsberg. The *Hortus deliciarum* was a kind of illustrated encyclopaedia written around 1185 CE as a teaching tool for young women in training to become nuns.

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Christians who disagreed with the orthodox, or traditional, teachings of the Church and who tried to spread their own ideas about Christianity could be labelled heretics and **excommunicated** from the Church. This would result in them being cut off from their communities and denied the possibility of going to heaven. In more extreme cases, they could be physically punished or killed.

excommunicate to be officially excluded from the Church and its sacraments



▲ **Source 1.70** An image created around the fourteenth and fifteenth centuries CE, possibly depicting the punishment of heretics known as Cathars in southern France

ACTIVITY 1.31
RESPONDING TO THE SOURCES

1 With a partner, **discuss** the following questions in relation to the paintings shown in Sources 1.67 to 1.69.
   - **a** What details do you see or notice?
   - **b** What do you think is occurring?
   - **c** What do these paintings make you wonder?

2 Now, meet up with another pair in the class and share your ideas.

3 **Interpret** what the creators of Sources 1.67 to 1.69 might have thought the afterlife, or 'Judgement Day', would be like. **Propose** how images such as these might have affected the actions and behaviour of the people who saw them.

4 **Examine** the scene shown in Source 1.70. **Explain** why the Church might have chosen such a severe punishment for heresy.

5 **Consider** whether people's religious beliefs in medieval Europe would have increased or decreased the Church's status and its influence in medieval society. **Explain** what makes you say this.

6 Extension activity: **Conduct** some research into the 'Cathar heresy' and **create** a mind map or short paragraph to demonstrate your understanding of the key ideas. Areas for investigation might include:
   - Where and when the Cathars existed and what their key beliefs were.
   - Why the Cathars' beliefs and actions were considered heretical.
   - How the Church punished the Cathars.
   - Why this should be seen as a significant event in the history of medieval Europe.

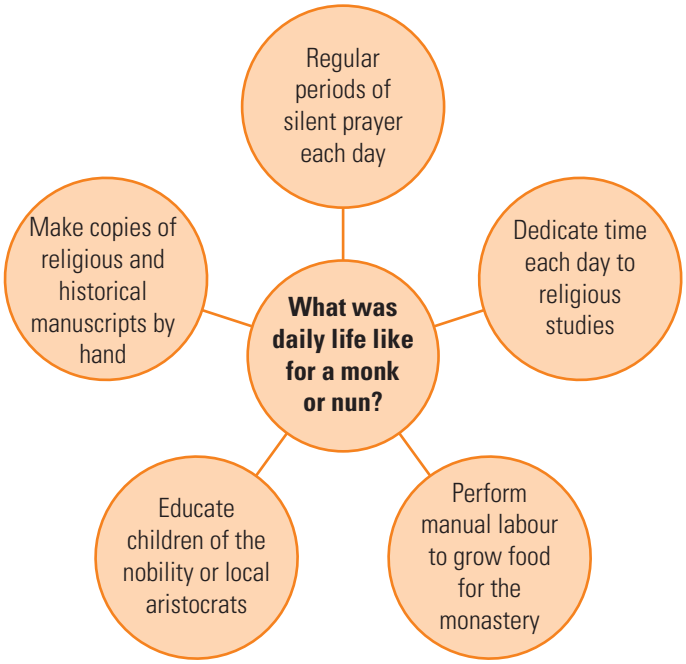
What was life like for a medieval monk or nun?

Monks and nuns were religious scholars who had dedicated their lives to God and who lived in monasteries. Becoming a monk or nun was a desirable career path for many young people in medieval society, and not just because they felt a strong sense of piety and devotion to God. Other reasons why young men and women may have become monks or nuns was because it was a stable and respected career choice,

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abbot head of a monastery

where a person could gain an education, do charitable work, and live a comfortable life with above-average accommodation and food. Monks were known as 'brothers' and were led by an **abbot**. Women who joined the monastic life as a nun in a monastery (also sometimes called a nunnery) were led by an abbess. The abbots and abbesses were highly respected in medieval society and often enjoyed an equal status to the nobility.



▲ **Source 1.71** Diagram showing some of the tasks that would be performed each day by medieval monks and nuns

Monasteries were self-sufficient and often very wealthy. They were financially supported by donations and by the income from the land owned by the monastery. Some of the men and women who joined monasteries were from very wealthy backgrounds and were required to make a sizeable donation to the monastery upon joining.

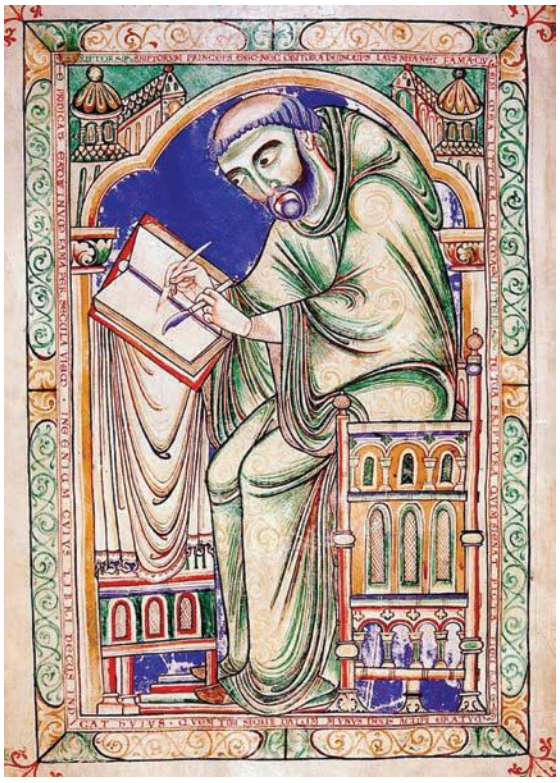
Unlike the monastery they had joined, the monks and nuns themselves were expected to be very poor and to give up most of their possessions. Monks shaved the tops of their heads and had just a few items of simple clothing, including their distinctive monastic robes. Monks and nuns spent almost all their daily life within the walls of the monastery, often working, praying and reading in silence. Monasteries performed a range of services for their communities, including founding and operating hospitals and orphanages, serving the poor and teaching the youth.

Monks and nuns also made important contributions to preserving knowledge by making copies of books on history and religious topics. Much of what we know about the medieval period can be learned from these books, known as illuminated manuscripts. These copies were made in a part of the monastery called the scriptorium and were 'illuminated' using gold and silver within the text and illustrations. Using techniques borrowed from scholars in the Middle East, monks and nuns created each of these books by hand. Each page took hours, or sometimes even days or weeks, to create. These books remained the dominant source of information in Europe until Johannes Gutenberg invented the printing press in 1440 CE. The press allowed information to be mass-produced, and the world began to learn about itself at a rapidly increasing pace.

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Recent research has challenged the belief that only monks contributed to the production of medieval manuscripts, with many examples of manuscripts produced by nuns and other women being identified, particularly in Germany and Austria. One prominent nun from Germany who contributed to numerous manuscripts was Sibylla von Bondorf (c.1440–1525 CE), who is believed to be responsible for nearly 200 full-page manuscript illustrations. The German abbess Hildegard von Bingen (c.1098–1179 CE) is famous for having written a range of scientific, medicinal and theological medieval texts as well as many liturgical songs.

▲ **Source 1.72** An extract from 'O frondens', composed by Hildegard of Bingen



▲ **Source 1.73** An image from a medieval manuscript known as the *Eadwine Psalter*, created c.1155 CE, depicting an English monk named Eadwine



▲ **Source 1.74** An illuminated page from a medieval manuscript from c.1492 CE, depicting monks from the Company of Mercy of Genoa



▲ **Source 1.75** An image from a thirteenth-century CE manuscript from Germany called the *Exposition of the Apocalypse*, showing medieval monks at work

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ACTIVITY 1.32
RESPONDING TO THE SOURCES

1 Illuminated manuscripts provide us with an insight into many aspects of life in medieval Europe, including the lives and roles of monks and nuns in medieval society. **Analyse** and **evaluate** Sources 1.73 to 1.75 to complete the table below.

Source	Describe the source – What is it? When was it created?	Analyse – What does it show? What impression might it give of the lives or roles of monks and nuns?	Evaluate – How does this support the view that medieval monks and nuns made valuable contributions to their communities?
1.73			
1.74			
1.75			

2 The text or font often used in the creation of illuminated manuscripts is known as 'blackletter' or 'Gothic script'. Search online for 'blackletter' to find an example alphabet and try to write your own name in blackletter. With a partner, **discuss** how fonts and writing styles have changed today.

ACTIVITY 1.33
MAKING THINKING VISIBLE

Generate–sort–connect–elaborate

This is a routine for organising your understanding of a topic through concept mapping.

With a partner, consider the following question:

'Why was the Church so influential in medieval Europe?'

- Review and **reflect on** what you have learned about the features of the Church in medieval Europe in this section and in other sections from this chapter. You may conduct additional research if you wish.
- **Create** a concept map to help you make connections between your ideas.
- **Generate** a list of ideas on the topic you have explored.
- Sort your ideas onto a blank page, placing central ideas in the centre of the page and more loosely related ideas towards the outside of your page.
- Connect your ideas together with lines to show which concepts have something in common or connect in some way. Write a short explanation along the line to explain how the ideas are connected.
- Elaborate on your concept map by adding new ideas and concepts that come to mind.

REFLECTING ON YOUR LEARNING 1.5

Reflect on what you have learned in this section:

1 Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the question: 'What effect did religion have on the lives of people in medieval Europe?'
2 **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'What was life like for people in medieval Europe?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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1

1.6 Interpretations about an event: what was warfare like in medieval Europe?

FOCUS QUESTIONS

- How prevalent was warfare in medieval Europe?
- How did the technology and strategies used in medieval warfare develop over time?
- What role did castles play in warfare in medieval Europe?
- How did medieval military technology and strategies develop in response to castles?

How prevalent was warfare in medieval Europe?

Warfare was a consistent feature of life in medieval Europe, as feudal lords constantly battled for control over territory. One such war, known as 'The Hundred Years' War' (1337–1453 CE), was fought between England and France over a period of 116 years and had a significant impact on the lives of all involved. It was not a continuous war, but a series of wars and battles between the two monarchies of England and France that stretched over a century. As the leaders of England and France fought for control of France, the French peasants suffered from the English tactics of raiding the French coast and its towns, targeting the peasants in violent raids, as it was they who paid the most tax to the French crown. The reasoning behind these attacks was that if the French monarchy had less money, the English would have a better chance of winning. It is estimated that 500 villages, castles and towns were attacked during this time.

Developments in military technology and weaponry, including castles, missile weapons, artillery, armour and gunpowder, also shaped people's experiences of war significantly throughout this period. One prominent example is the development of the English longbow and its effectiveness at the Battle of Agincourt in 1415 CE. The English King Henry V, with an army of nearly 80 per cent longbowmen, defeated the numerically superior French, showing the importance of technology and military tactics in warfare.

As you read through the following information in this section, consider what life would have been like for those involved in medieval warfare, and how their experiences were shaped by their beliefs as well as by evolving technology and tactics.

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ACTIVITY 1.34
MAKING THINKING VISIBLE

See, think, wonder

This routine encourages you to make careful observations and thoughtful interpretations. It helps stimulate curiosity and sets the stage for inquiry.

Examine the image of the fortified city of Carcassonne in Source 1.76. Then **discuss** your answers to each of the following questions with a partner:

1. What do you *see* (or notice) in this image?
2. What does this image make you *think* life for the people living in Carcassonne may have been like? What does it suggest about the nature of warfare in medieval life?
3. What does this image make you *wonder*? What questions do you have?



▲ **Source 1.76** Most of the fortifications of the medieval French fortified city of Carcassonne were probably present by c.1230 CE.

How did the technology and strategies used in medieval warfare develop over time?

A KNIGHT'S ARMOUR

In the open field of battle, a knight with his horse were deadly opponents to face. They were an essential tactic of war as a massed charge of 100 or more armoured fighters on their horses was difficult to defend against. At full speed, they could simply charge through defending lines of foot soldiers and create chaos as they sliced and slashed enemies from above. Over time, the quality of armour worn by a knight improved and was more intricately decorated.



▲ **Source 1.77** A medieval suit of armour from Italy, c.1450 CE

A full body of heavy steel armour pieces covered the knight from head to toe. Only the smallest hole existed in the helmet for the knight to see out, otherwise there were almost no exposed areas of skin so that no well-swung sword or well-aimed arrow could harm him. For a knight to engage in hand-to-hand combat in battle, he needed to dismount from his horse to get in close to the enemy, weapons in hand.

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▲ **Source 1.78** An image depicting the 1382 CE Battle of Beverhoutsveld, in Belgium, from *The Chronicles of Jean Froissart*, written in the fourteenth century CE

ACTIVITY 1.35
RESPONDING TO THE SOURCES

1 **Analyse** the image of a suit of armour shown in Source 1.77. Use the table below to **compare** the advantages and disadvantages of the use of knightly armour on the battlefield.

Advantages of fighting in a knight's armour	Disadvantages of fighting in a knight's armour

2 **Describe** what problems a knight might encounter if they fell off their horse.
3 **Evaluate** the scene depicted in Source 1.78. **Select** five words to describe your impression of medieval warfare based on this image. **Compare** and **explain** your responses with a partner.
4 Extension: **Conduct** some research into the use of armour by the military or police forces in Europe today. **Compare** the similarities and differences between medieval and modern protective clothing. **Decide** whether or not armour is still relevant.

THE LONGBOW

The longbow was the most lethal killing machine of the medieval era. A simple bow and arrow had long been tools of hunting and war and can be traced back to the ancient Egyptians. In medieval warfare, almost all armies used a medium-sized bow and arrow that was slightly over a metre in length, and when used in battle, a few hundred or a few thousand archers would position themselves behind the foot soldiers and fire arrows on the enemy. A skilled archer could fire only a few arrows per minute. In the mid-1200s, archery became a national sport in England and, by law, archery was the only sport that could be practised on Sundays. As a result, the English became renowned for

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their skill. The development of the longbow, a 1.8-metre-tall bow that was much larger than a standard bow, was crucial in English warfare. What made it different was that it could be fired at a much faster rate and with larger arrows that could pierce the armour worn by the enemy from at least 200 metres away. In addition to this, the thousands of trained archers in the English population became a central part of the battle strategy.

At the Battle of Crécy on 26 August 1346 CE, the longbow proved its place in English military history. The Battle of Crécy was one of the early battles in the long period of conflict between the fierce enemies of England and France, known as the 'Hundred Years War'. In this battle, the French army attempted to use crossbowmen from Genoa (known as the Genoese) in battle. However, they were faced with the might of the English longbows. The English army of between 7000 to 15 000 soldiers was vastly outnumbered by between 20 000 to 30 000 French soldiers and knights. The English retreated to a position that forced the French army to squeeze through a narrow patch of wet landscape. With the French closely packed together in their advance, the English longbowmen, high up on a hill, rained thousands upon thousands of arrows down on the much larger army. It was a massacre. Contemporary historians dispute the exact number of losses, but all agree it was a definitive victory for the English. By the end of the battle, one source claims 14 000 French soldiers, including 1500 knights, had been killed for the loss of just 200 to 300 English soldiers.

THE CROSSBOW

The crossbow evolved from the bow and arrow and served as the invention that came before the rifle. It was essentially a bow attached to a piece of wood that could be held horizontally and fired from the shoulder. The advantage of the crossbow was that it was easy to use and did not require a lot of training. The only problem was that it was slow to load. A crossbowman had to place it on the ground and use a series of tools to pull the string back and load the next arrow. However, once armed, it was deadly and dangerous. At close range, it could pierce the armour of a knight, which caused havoc for feudal society. On a battlefield where crossbows appeared, no one was safe. It was so deadly that in 1096 CE, Pope Urban II banned its use against other Christians during war, which meant, of course, any non-Christian was fair game.



▲ **Source 1.79** An image from a fourteenth-century CE manuscript depicting the Battle of Crécy on 26 August 1346 CE between the French and the English forces

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French chronicler Jean Froissart (c.1337–1405 CE) described how the Battle of Crécy unfolded (see Source 1.80).

> As soon as the King of France came in sight of the English his blood began to boil, and he cried out to his marshals, 'Order the Genoese forward, and begin the battle, in the name of God and St. Denis!'
>
> There were about fifteen thousand Genoese crossbowmen; but they were quite fatigued, having marched on foot that day [thirty kilometres], completely armed and with their crossbows. They told the constable they were not in a fit condition to do any great things that day in battle … The English archers then advanced one step forward and shot their arrows with such force and quickness that it seemed as if it snowed. When the Genoese felt these arrows, which pierced their arms, heads and through their armour, some of them cut the strings of their crossbows, others flung them on the ground, and all turned about and retreated quite discomfited. The French had a large body of men-at-arms on horseback, richly dressed, to support the Genoese. The King of France, seeing them thus fall back, cried out, 'Kill me those scoundrels, for they stop up our road without any reason.' Then you should have seen the above-mentioned men-at-arms lay about them, killing all they could of these runaways. The English continued shooting as vigorously and quickly as before. Some of their arrows fell among the horsemen, who were sumptuously equipped, and, killing and wounding many, made them caper and fall among the Genoese, so that they were in such confusion they could never rally again.

▲ **Source 1.80** Jean Froissart's *Chronicles* covered the history of the period of the Hundred Years' War between England and France. His work was based on earlier writings by historians such as Jean le Bel. In this excerpt, Froissart provides an account of the 1346 CE Battle of Crécy.

ACTIVITY 1.36
RESPONDING TO THE SOURCES

1 Use the table below to **compare** the strengths and limitations of longbows and crossbows.

Longbow strengths	Crossbow strengths
Longbow limitations	Crossbow limitations

2 Analyse Source 1.80 to **identify** the main reasons Froissart gives for why the French side lost the Battle of Crecy.

3 Both the longbow and crossbow were used at the Battle of Crecy in 1346 CE. Use the sources in this section as well as the other information provided to **explain** why the English, using the longbow as their main missile weaponry, were able to win this battle.

4 **Explain** how the introduction of the technologies of the longbow and crossbow may have changed the nature of warfare in medieval Europe. **Describe** how these technologies might have had long-term implications for medieval knights in particular.

What role did castles play in warfare in medieval Europe?

Castles were large stone buildings that sat at the centre of a noble's land. Usually at the top of the hill, above the village, the castle served two very important functions. It provided security in times of war and loomed as a large and imposing structure to remind everyone of the power and wealth of the noble. Fortified buildings have existed to protect populations since ancient times, but as they were incredibly

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▲ **Source 1.81** An artist's impression of a motte-and-bailey castle

difficult and expensive to build, they were often made of wood. The most common early form of a medieval castle was a motte-and-bailey, which housed the local population in an area known as the bailey, and the noble was protected by high walls on a tall mound of earth known as a motte. In times of trouble, the population could flee the bailey and defend against attack from the motte. The trouble was that wooden mottes were easy for attackers to burn down. Thus, stone castles were built.

Over the course of the medieval period, exposure to the mathematics and engineering of the Islamic world meant that castle technology in Europe improved. Stone castles were built because they could not be set on fire, and the strong structure made it hard to destroy, even in the face of rapidly improving medieval weaponry. Stone castles were extremely expensive to build, so the greater the castle, the greater the power of the noble who lived there. In the centre of the castle was the *keep*, which housed the noble and his family. The *keep* was a tall stone structure that had one room per level, strong walls and few windows. This was the safest place in the castle. An outer ring of guard towers and fortified walls surrounded the keep. Over time, castles within castles were built to house large populations, armies and knights. Windows became small slits in the wall that allowed archers to fire arrows at approaching armies.

Often the whole structure was surrounded by defensive earthworks in the form of a ditch, or a *moat*, a body of water that was deep enough to prevent horses from riding across. Given that few people knew how to swim, a moat was a decent second line of defence. To access the castle, the bridge across the moat contained a *drawbridge*, which could be pulled up and closed to prevent marauding enemies from getting any closer. In front of the drawbridge, many castles had a *barbican*, an exterior defensive structure that fortified the entrance to the castle through a series of walls and iron gates.



▲ **Source 1.82** Dover Castle is an example of a stone castle. It was built in the twelfth century and is the largest castle in England.

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▲ **Source 1.83** Bodiam Castle, England, was built in 1385 CE and is surrounded by a water-filled moat.

ACTIVITY 1.37
RESPONDING TO THE SOURCES

1. **Compare** the castles shown in Sources 1.81 and 1.82. **Explain** how the castle shown in Source 1.82 would have been easier to defend than the one in Source 1.81.
2. **Examine** the features of the castles shown in Sources 1.82 and 1.83. **Create** a list of all the defensive features of each castle that you can identify. **Decide** which of these two castles you think would have been harder to successfully capture. **Explain** what makes you say this.
3. **Explain** how the presence of castles such as these might have helped local nobles to maintain their control over people in their region in medieval times.
4. Castles provided quite formidable defences against attack. With a partner, **discuss** what strategies or technology you think might have been effective in medieval times for an attacker who was trying to capture a castle.

How did medieval military technology and strategies develop in response to castles?

SIEGES

While most battles took place staged in large fields, retreating armies often used their castles to fight off the enemy. Laying **siege** to a castle was a long-tried tactic of war. While the defending force took all of their food, supplies and surviving population inside the walls and locked the gate, the attacking force would wait outside and hopefully starve the castle's inhabitants out. When it came time to attack, several tactics were used.

siege military tactic that involves surrounding a city and cutting off supplies, until the inhabitants must surrender or starve

trebuchet large device used in wars for throwing large rocks at the walls of a castle as part of an attack

TREBUCHETS

A **trebuchet** was essentially a large sling shot with a lever. Once the lever was released, large stones could be hurled at castle walls and sometimes over them. Their intention was to either break holes in the wall to allow attackers to climb in, or cause chaos on the inside. In various conflicts, the trebuchet was used to hurl flaming objects or the disease riddled bodies of the dead to create further problems for the defenders.

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▲ **Source 1.84** A depiction of the 1099 CE siege of Jerusalem from the *Historia*, a medieval manuscript created by William of Tyre in c. 1180 CE. William of Tyre lived in the Kingdom of Jerusalem, a Christian territory established at the end of the First Crusade, and became archbishop of Tyre.

SIEGE TOWERS

Once the order was given to attack the walls of the castle, soldiers with ladders stormed the walls and were followed by large towers on wheels known as siege towers. The tower would be protected on the outside by wet animal hides to prevent arrows from hitting the soldiers inside. The wet hides were also an attempt to stop the defenders from setting it on fire. Once it was against the castle wall, foot soldiers would climb up a ladder to the top of the tower and charge across the walls.

BATTERING RAMS

The easiest way to capture a castle was through the front door, which was usually protected by two or more heavy wooden and steel gates. A battering ram was usually a thick tree trunk, used horizontally to ram open the castle door. The battering ram could be fixed with wheels and pushed by a number of soldiers. Other times it could be carried up to the door and swung on a large pendulum to crash against the gate. The ram was not a sophisticated weapon, and it took a lot of strong, determined soldiers to operate it. They would be consistently under fire from archers and soldiers throwing rocks from the castle walls.

GUNPOWDER

Gunpowder is thought to have been invented in China around 850 CE by mixing charcoal, sulphur and **saltpeter**, which created an explosion. The bigger the quantities of each substance used, the bigger the explosion and greater the destruction. It is presumed that gunpowder arrived in Europe sometime in the thirteenth century via the **Silk Road**. Gunpowder was used in large cannons to fire huge, heavy stone balls at the walls of castles to break them down. The first cannon appeared in a medieval battle as early as the Battle of Crécy in 1346 CE, but they had little impact. These cannons were large, heavy and difficult to transport to battle, but further developments allowed gunpowder to be used with handheld guns and smaller cannons. As the use of gunpowder and manoeuvrable cannons became more common, more powerful, and more accurate, and those using them required less training, the effectiveness of castles and a knight's armour was greatly reduced.

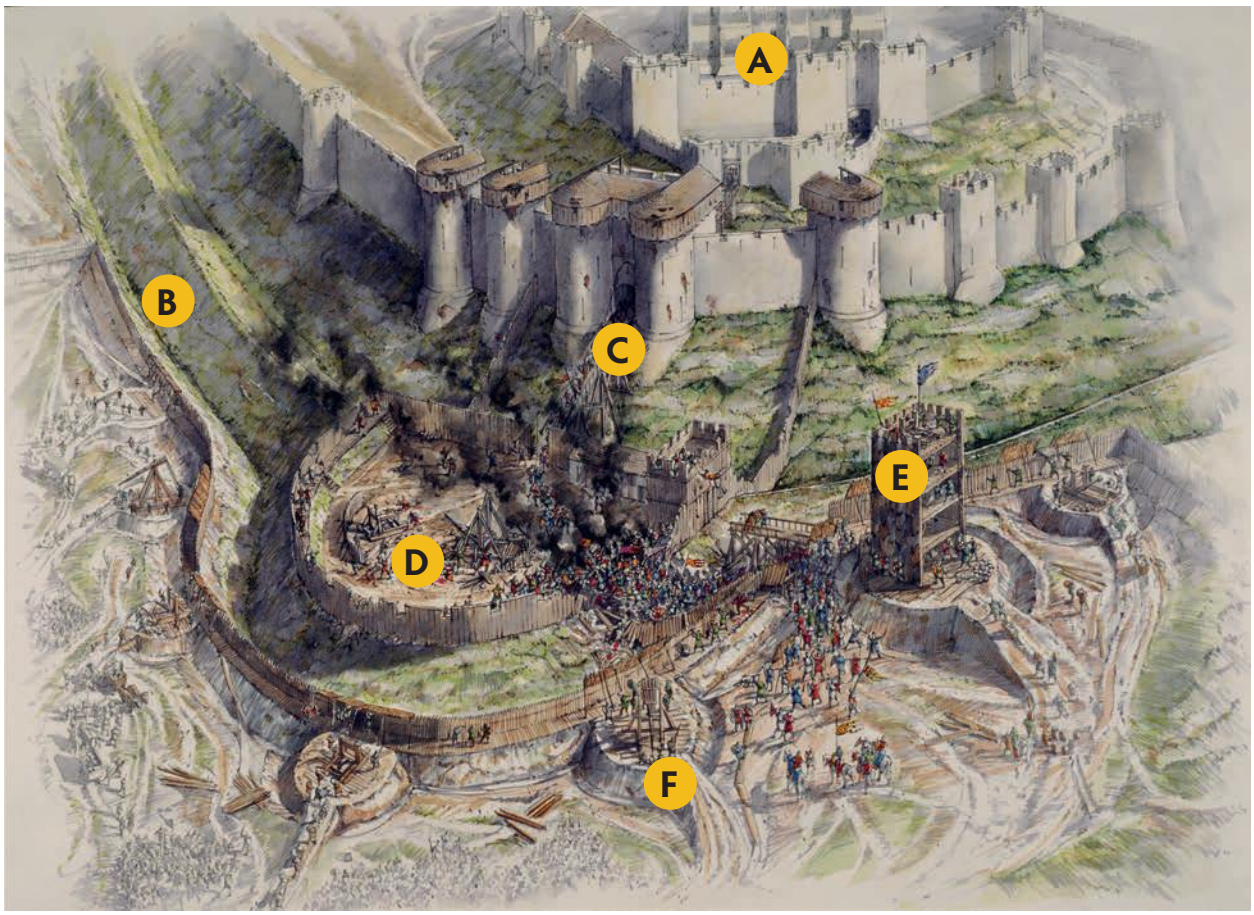
saltpeter salty-tasting white powder used to preserve meat, and also used in producing explosives and fertilisers

Silk Road trading route that linked China and the far east to Europe

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◄ **Source 1.85** A depiction of the siege of Chateau Gaillard, France, from the *Vigils of King Charles VII*, a medieval manuscript created by the French poet Martial d'Auvergne in c.1484 CE.



▲ **Source 1.86** A present-day artist's depiction of the siege of Dover Castle, England, in 1216 CE. (The letters on this image will be used for Activity 1.38.)

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ACTIVITY 1.38
RESPONDING TO THE SOURCES

1 **Identify** the weapons and equipment being used in the sieges depicted in Sources 1.84 and 1.85.
2 **Identify** the dates of the sieges depicted in Sources 1.84 and 1.85 and **explain** how these sources provide evidence that medieval weaponry improved over time.
3 **Describe** how the developments in military technology shown in Source 1.85 might have affected the usefulness of castles and knights by the end of the medieval period. **Explain** what kind of flow-on effects this might have had on the feudal system itself.
4 The image in Source 1.86 is an artist's depiction of features of castles and siege equipment used in medieval times. **Analyse** this source to complete the table below.

Feature	Identify the feature – what is it?	Describe the purpose of this feature
A		
B		
C		
D		
E		
F		

5 **Identify** any additional features of the castle design in Source 1.86 you notice that might have helped defend it from invaders.

ACTIVITY 1.39
MAKING THINKING VISIBLE

+1 routine

A routine for identifying important ideas worth remembering.

1 Having worked through Section 1.6, individually write down key points you can take away from the text. What have you learned about the nature of warfare in medieval Europe? Try to do this without rereading the text.
2 Now, pass your notes to the person on your right. The person next to you needs to take 1–2 minutes to read through your notes and then add one new note to the page. This can be new information, an elaboration on another note, or a connection between ideas.
3 Continue to pass notes around the room two more times.
4 Return all notes to the original owners.
5 Now, you may read and **reflect on** the additional notes made on your page and add ideas you may have picked up from reading other students' work.

REFLECTING ON YOUR LEARNING 1.6

Reflect on what you have learned in this section:

1 Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the question: 'What was warfare like in medieval Europe?'
2 **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'What was life like for people in medieval Europe?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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1

1.7 Interpretations of an event: what were the Crusades and what do they reveal about life in medieval Europe?

FOCUS QUESTIONS

- What were the Crusades?
- What motivated people to join the First Crusade?
- What were the main features and outcomes of the Second Crusade?
- What were the main features and outcomes of the Third Crusade?
- What were the main features and outcomes of the Fourth Crusade?
- What was the impact of the Crusades?

In this section, you will learn more about a series of wars from the eleventh to thirteenth centuries, known as the Crusades. As you read the following information and sources, consider what we can learn about the motives, beliefs and attitudes of the people in medieval Europe who participated in these wars, and what life might have been like for people living at this time.

What were the Crusades?

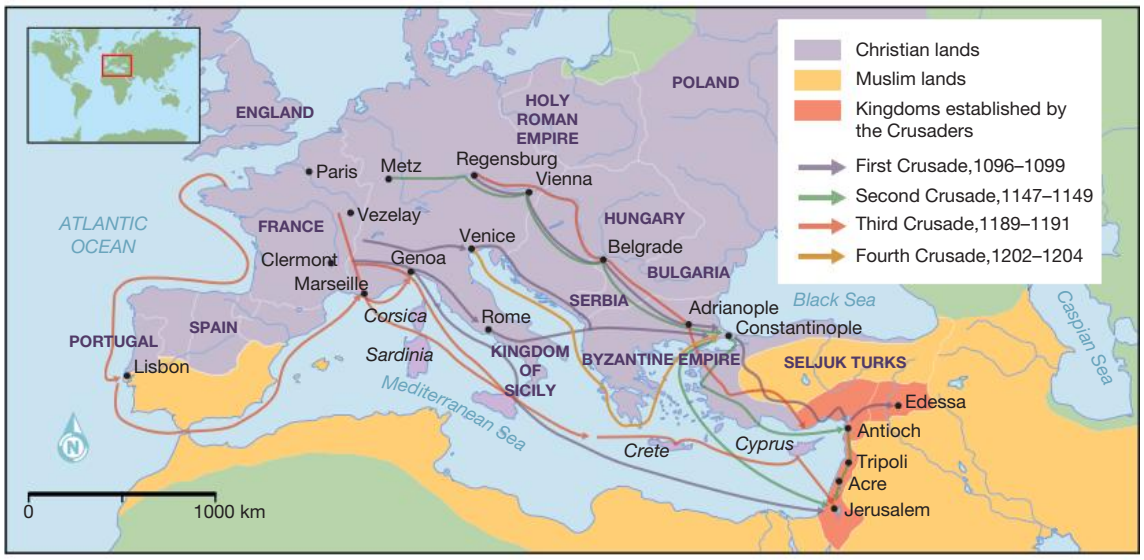
The Crusades were fought over the Holy Lands, an area in the Middle East that corresponds to modern-day Palestine and Israel, and the city of Jerusalem. This area is a significant place in Christianity, Islam and Judaism. As such, it has long been a centre of conflict and remains so today.

In Medieval times, many people wanted to show a commitment to their faith. By 1096 CE, a new expression of Christian faith became common. Thousands of Europeans, of all social backgrounds, travelled to the Holy Lands, which were dominated by Islamic leaders and societies, and waged war to take them in the name of Christianity.

The Crusades took place between 1096 CE and 1271 CE and were known for their savagery. The strength of European belief in Christianity was matched by Muslims' belief in Islam and their right to defend their Islamic lands, and so massacres occurred on both sides. Christians in Europe were inspired by the opportunity to capture the land of their faith and secure the mythical objects and sites that they learned of in the Bible. For some of them, it was a chance for conquest and to feed greedy appetites for wealth. For Muslims, it was a case of defending their homeland and a chance to live in paradise by dying in a jihad. More than any conflict in Europe, this was a grand clash of civilisations.

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▲ **Source 1.87** A map showing the land held by Christians and Muslims and the routes of the first four Crusades

What motivated people to join the First Crusade?

Byzantine Empire continuation of the Roman Empire in its eastern provinces during late antiquity and the Middle Ages

Seljuk Turks tribes that invaded south-western Asia in the eleventh century and eventually founded an empire that included Mesopotamia, Syria, Palestine and most of Iran

In 1095 CE, Pope Urban called on the Christian kings of Europe to come to the aid of the Christian **Byzantine Empire**, which was at war with Islam. Their aim was to capture and occupy the Holy Land in the name of Christianity. The initial group to go was a band of disorganised peasants called 'The People's Crusade' who marched from Europe only to be massacred near Constantinople by the **Seljuk Turks**.

The following year, a group of French nobles and their armies marched on Jerusalem. On their way, they fought several terrible battles and massacred thousands of Muslim soldiers and civilians. It took three years. On 7 June 1099 CE, the Christian army reached the holy city of Jerusalem and immediately laid siege to it. Using three siege towers, the Christian armies breached the city walls and opened the gate. Knights and foot soldiers poured in and slaughtered thousands of Muslim and Jewish citizens, taking control of the city and the holy lands.



◄ **Source 1.88** An image of Pope Urban II calling for the First Crusade in 1095 CE, from a fourteenth-century CE manuscript titled *Roman de Godfroi de Bouillon*

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I hoped to find you as faithful and as zealous in the service of God as I had supposed you to be …

… your brethren (brothers) who live in the east are in urgent need of your help, and you must hasten to give them the aid which has often been promised them. For … the Turks and Arabs have attacked them … as far west as the shore of the Mediterranean … They have occupied more and more of the lands of those Christians and have overcome them in seven battles.

They have killed and captured many, and have destroyed the Churches and devastated the empire … On this account I, or rather the Lord, beseech you as Christ's heralds to publish this everywhere and to persuade all people of whatever rank, foot-soldiers and knights, poor and rich, to carry aid promptly to those Christians and to destroy that vile race from the lands of our friends. I say this to those who are present, it meant also for those who are absent.

Moreover, Christ commands it. All who die by the way, whether by land or by sea, or in battle against the pagans, shall have immediate remission of sins. This I grant them through the power of God with which I am invested … With what reproaches will the Lord overwhelm us if you do not aid those who, with us, profess the Christian religion!

▲ **Source 1.89** Pope Urban II's 1095 CE address to the Council of Clermont, where he called for the First Crusade in front of a gathering of hundreds of nobles and priests. This version of his speech was recorded in *A History of the Expedition to Jerusalem* by a priest named Fulcher of Chartres, who travelled on crusade in the party of Stephen of Blois and Robert of Normandy and recorded a chronicle of the Crusades. He was likely present at the Council of Clermont.



ACTIVITY 1.40
RESPONDING TO THE SOURCES

1. Source 1.88 is an image from a fourteenth-century CE manuscript, depicting Pope Urban II calling for the First Crusade in 1095 CE. **Explain** why someone in the fourteenth century CE might have painted this image.
2. **Analyse** Source 1.89 to **identify** what reasons Pope Urban II gives for why people should join the Crusade.
3. **Explain** whether you would consider Fulcher of Chartres to be a reasonably reliable and useful source for learning about the motives of the Crusaders. Provide at least two reasons for your answer.
4. **Create** a poster to recruit lords, knights and peasants to join the First Crusade and travel to Jerusalem. Your poster should:
   - Include a catchy headline to attract recruits
   - Provide at least three reasons to join the Crusades
   - Include a picture, symbol or diagram for visual effect.

You may be very sure, dearest, that the messenger whom I sent to give you pleasure, left me before Antioch safe and unharmed and through God's grace in the greatest prosperity … You may know for certain, my beloved, that of gold, silver and many other kinds of riches I now have twice as much as your love had assigned to me when I left you. For all our princes, with the common consent of the whole army … have made me up to the present time the leader, chief and director of the whole expedition.

▲ **Source 1.90** An extract from a letter from Stephen, Count of Blois (one of the leaders of the First Crusade) to his wife Adele. This letter, translated from French, is one of many that Count Stephen wrote to his wife about the crusade's progress.

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Jerusalem was taken from the north on the morning of … 15 July 1099. The population was put to the sword by the Crusaders, who pillaged the area for a week. A band of Muslims barricaded themselves into the Oratory of David and fought on for several days. They were granted their lives in return for surrendering. The Crusaders honoured their word, and the group left by night for Ascalon. In the (al-Aqsa mosque) the Crusaders slaughtered more than 70000 people, among them large number of Imams and Muslim scholars, devout and ascetic men who had left their homelands to live lives of pious seclusion in the Holy Place (Jerusalem). The Crusaders stripped the Dome of the Rock of more than forty silver candelabra, each of them weighing 3600 drams, and a great silver lamp weighing forty-four Syrian pounds, as well as a hundred and fifty smaller silver candelabra and more than twenty gold ones, and a great deal more booty.

▲ **Source 1.91** An account of the actions of the Crusaders at the siege of Jerusalem, which occurred in 1099 CE. It was written by a Muslim Arab historian named Ibn al-Athir, around 1231 CE, in a work of history called *The Complete History*.

ACTIVITY 1.41
RESPONDING TO THE SOURCES

1 **Analyse** Sources 1.90 and 1.91 to **explain** what they reveal about the actions of Crusaders involved in the First Crusade. **Explain** what other motives these sources might suggest the Crusaders might have had for joining the First Crusade.

2 **Evaluate** the reliability and usefulness of the authors of Sources 1.90 and 1.91. **Explain** what the strengths and limitations of these sources might be for learning about the actions of the Crusaders.

THINKING DEEPER
HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Perspectives.

Your response should contain:

- A clear identification of the source's perspective
- Evidence from the source to demonstrate this perspective (note, this may include implied meaning)
- Discussion of how the source's origin or context may account for this perspective
- Discussion of how this perspective compares to other perspectives (in questions that use more than one source)
- Consideration of how this source's perspective is useful in responding to the question.

ACTIVITY 1.42
MAKING THINKING VISIBLE

Headlines routine

This routine draws on the idea of newspaper-type headlines as a vehicle for summing up and capturing the essence of an event, idea, concept, topic, etc. It can be done on computer or on paper.

Based on your reading of Source 1.91 and the information about the First Crusade, **create** a headline for a medieval newspaper that captures the most important aspect of the outcome of the event from either a Christian or a Muslim perspective. Once finished, share these headlines with a partner and/or with your class to see if they can correctly **identify** which perspective your headline represents.

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What were the main features and outcomes of the Second Crusade?

Jerusalem and other holy cities remained in Christian hands for the next 31 years. Most of the Christian armies had returned home, and those left behind to control the Holy Lands divided it into the four states of Jerusalem: the County of Edessa, the Principality of Antioch, the County of Tripoli, and the Kingdom of Jerusalem. In 1140 CE, Islamic armies began to gather and organise a holy war against the Christians, who they called Franks. When Islamic armies captured the city of Edessa from the Christians in 1144 CE, the Second Crusade was ordered by King Louis VII of France and King Conrad III of Germany. In October of that year, the Islamic armies destroyed Conrad's forces at the city of Dorylaeum. Later, when Louis arrived with 50 000 men at the grand city of Damascus, an even larger Islamic army, led by Nur al-Din, the governor of Aleppo, met them on the field of battle and defeated the Christian armies, giving control of Damascus to al-Din in 1154 CE and endangering the control of the Christian presence in Jerusalem.



▲ **Source 1.92** A fourteenth-century CE illustration of King Louis VII of France attacking a Muslim army, from the *History of Heraclius*. The author is unknown.

ACTIVITY 1.43
RESPONDING TO THE SOURCE

1. **Identify** which figures in Source 1.92 are the Christian army, and which are the Muslim army. **Explain** what makes you say this.
2. **Explain** what Source 1.92 can tell us about the nature of warfare in the Crusades.
3. Based on what you have read so far, **decide** whether the Second Crusade should be seen as a victory for the Christian army or for the Muslim army.

What were the main features and outcomes of the Third Crusade?

The response to Nur al-Din's victory was swift, and Islamic armies spread across the Middle East battling Crusader armies and forcing them into retreat. By 1187 CE, a legendary military leader, Saladin, had emerged. After Saladin defeated a Christian army at the city of Hattin and recaptured Jerusalem later that year, a Third Crusade was ordered,

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this time by Emperor Frederick Barbarossa of the Holy Roman Empire, King Philip II of France, and King Richard I of England, who was soon to be known as Richard the Lionheart.

An epic struggle between Richard the Lionheart and Saladin ensued, with the two leaders' armies meeting at the battle of Arsuf in September 1191 CE (though Richard and Saladin never personally met). Richard's Crusader army was victorious; however, he did not retake Jerusalem. Rather, he signed a peace treaty with the great leader of the Islamic armies, which effectively allowed the two civilisations to share control of the Holy Lands.



▲ **Source 1.93** The capture of Jerusalem by Saladin in 1187 CE, depicted in a fifteenth-century French manuscript called *The Abbreviated Chronicle*, by David Aubert. Saladin is shown on a white horse, receiving the keys to the Tower of David.

During the peace negotiations between Saladin and Richard the Lionheart, both were arguing over the ownership of Jerusalem and a religious relic, 'the True Cross', that was thought to be a piece of the wooden cross upon which Jesus was crucified. Saladin had captured the relic from the Christians at the Battle of Hattin in 1187 CE. He never returned it and the relic was never seen again. However, the negotiations reveal a desire for both leaders to defend their faith.

> The Muslims and the Franks (Europeans) are reduced to desperation; their cities are destroyed, and they have few men or supplies left. and since justice has been done, we need to speak only of Jerusalem, of the Cross and of the land in question. As to Jerusalem, we are fully resolved never to give it up, even if we had just one man left … and lastly, as regards the Cross – to you it is nothing but a piece of wood, but it is very precious in our eyes. If the sultan will graciously give it into our hands, we will make peace and be able to breathe again.

▲ **Source 1.94** An account of a communication from Richard to Saladin, recorded by Saladin's historian, adviser and friend, Baha' ad-Din ibn Shaddad in c.1200 CE. Baha' ad-Din ibn Shaddad was an eyewitness to many events of the Third Crusade.

> Jerusalem belongs to us just as much as to you and is more precious in our eyes than in yours. It was the place of our prophet's journey, and the place where the angels gathered. Therefore, do not imagine that we shall give the city up to you, or that you will convince us in the matter. As regards the land, it belonged originally to us, and you came to attack us; if you succeeded in taking the land, it was only because you came unexpectedly and also because the Muslims there were weak; as long as the war lasts God will not allow you to build anything in this country. Lastly, as concerns the Cross, its possession is a great advantage to us, and we cannot give it up except if we could gain from it some advantage to Islam.

▲ **Source 1.95** An account of a communication from Saladin to Richard, recorded by Saladin's historian, adviser and friend, Baha' ad-Din ibn Shaddad in c.1200 CE. Baha' ad-Din ibn Shaddad was an eyewitness to many events of the Third Crusade.

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ACTIVITY 1.44
RESPONDING TO THE SOURCES

1 Using Source 1.94, **identify** what it is that Richard and Saladin want from each other.
2 **Compare** Sources 1.94 and 1.95. **Describe** the similarities and differences you can see in their wants and needs.
3 **Consider** the history of the Crusades to this point. **Explain** what arguments Saladin was making.
4 **Explain** what the desire for the 'True Cross' implies about Richard's primary motivations.
5 **Explain** why Saladin might have wanted to hold on to the 'True Cross.'
6 **Explain** what Sources 1.94 and 1.95 can tell us about the nature of the Crusades.
7 In the medieval era, Saladin was often portrayed as 'the honourable enemy' of the Crusaders. **Explain** how the outcomes of the Third Crusade, as well as depictions of him such as in Sources 1.93 and 1.95, might have contributed to this image of Saladin.

What were the main features and outcomes of the Fourth Crusade?

Pope Innocent III called for the Fourth Crusade in 1198 CE. However, before it could reach the Holy Lands, a dispute between European rulers and those of the Byzantine Empire (allies of the Crusaders) distracted the two Christian forces from fighting the Muslims and led to them fighting each other. In 1204 CE, European Crusader armies declared war on the Byzantine Empire and the fighting led to the near destruction of the Byzantine city of Constantinople and the Byzantine Empire itself, as Crusader armies looted the city.



▲ **Source 1.96** Fourth Crusade: view of the conquest of Constantinople by the crusaders in 1203–1204 CE depicted in a fifteenth-century CE French manuscript called *The Abbreviated Chronicle*, by David Aubert

How shall I begin to tell of the deeds committed by these despicable men! Alas, the images, which should have been adored, were trodden under foot! Alas, the relics of the holy martyrs were thrown into unclean places! Then was seen what one shudders to hear, namely, the divine body and blood of Christ was spilled upon the ground or thrown about. They snatched the precious **reliquaries**, thrust into their arms the ornaments which these contained, and used the broken remnants for pans and drinking cups …

reliquary a container for relics, also called a shrine

… the sacred altar (of the church of Hagia Sophia, a Christian cathedral), formed of all kinds of precious materials and admired by the whole world, was broken into bits, and distributed among the soldiers, as was all the other sacred wealth of so great and infinite splendour.

… the sacred vases and utensils of unsurpassable art and grace and rare material, and the fine silver, wrought with gold, which encircled the screen of the tribunal and the ambo, of admirable workmanship and the door and many other ornaments, were (stolen) …

▲ **Source 1.97** An account of the sack of Constantinople by the Crusaders of the Fourth Crusade, by a Byzantine government official and historian named Nicetas Choniates. Choniates wrote his *Historia* between 1204 CE and 1217 CE and was probably an eyewitness to the events he described.

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ACTIVITY 1.45
RESPONDING TO THE SOURCES

1 Constantinople was a Christian city and the capital for Eastern Orthodox Christianity. Using Sources 1.96 and 1.97, **describe** the actions of the Crusaders of the Fourth Crusade against the city of Constantinople.
2 **Evaluate** whether the actions of the Crusaders of the Fourth Crusade were consistent with the goals of the Crusades that Pope Urban II declared at the beginning of the First Crusade. **Determine** what this might suggest about the motives of those who joined the Fourth Crusade.

THE CHILDREN'S CRUSADE

In the thirteenth century, the Crusades became smaller and were focused on fighting non-Christians in Europe. However, in 1212 CE a mysterious 'Children's Crusade' began as thousands of children are thought to have left their homes and marched on the Holy Lands. Historians have long debated whether this happened, if it was even a Crusade, and if there were any children involved! It is rumoured that those who did march never made it to the Holy Lands as they were captured and sold into slavery.

THE FIFTH, SIXTH, SEVENTH, EIGHTH AND NINTH CRUSADES

A series of battles in Egypt and attempts to remove the Muslim armies from the Holy Land between 1217 CE and 1291 CE ended in failure for the European armies as the last Crusader city, Acre, fell to a new and powerful dynasty known as the Mamluks.

What was the impact of the Crusades?

Overall, the Crusades were a failure for European Christians. However, the interaction between the two civilisations, good and bad, led to increased wealth for the Roman Catholic Church, and mutual trade in knowledge and technology.

Mathematics and science from the Islamic world found its way to Europe and improved the quality of castles and housing. The meeting of these two civilisations also provided access to the Silk Road, vital trading routes to Asia, and began to connect knowledge and ideas between the east and west. The exchanges of goods in trade and commerce created a new social group in Europe called the **merchant class**, who travelled and generated their own wealth – two things that were quite unfamiliar in feudal Europe.

merchant class new social group who bought and sold goods between East and West

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ACTIVITY 1.46
MAKING THINKING VISIBLE

Attitudinal scale

Note: if time permits, you may wish to conduct some additional research to improve your knowledge of the topic before beginning this activity.

1 Class discussion: 'What was the primary motive of the crusaders: God or gold?'

2 In your class, **create** an attitudinal scale from one end of the classroom to the other. At each end will be the absolute opposing viewpoints:

God	Gold

3 Each student will place themselves along the scale continuum. Various students will be asked to **justify** why they are standing where they are.

4 You will then have the opportunity to move after hearing the viewpoint of others in your class. Students will again be asked for **justifications**.

THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Contestability.

Your response should contain:

- A clear identification of the interpretations of the past
- An assessment of the degree of corroboration or contestability between interpretations
- Evidence from the sources that illustrates the historical interpretations
- A judgement about which of the differing interpretations is best supported by evidence.

REFLECTING ON YOUR LEARNING 1.7

Reflect on what you have learned in this section:

1 Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the question: 'What were the Crusades and what do they reveal about life in medieval Europe?'

2 **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'What was life like for people in medieval Europe?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

▼ **Source 1.98** The Crusader fortress known as the Castle of Krak des Chevaliers, located in present-day Syria, was used as an important military base by the Knights Hospitaller from 1142 CE to 1271 CE.



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1.8 How did the actions of significant individuals impact the lives of people in medieval Europe?

FOCUS QUESTIONS

- What qualities are required for someone to be considered a significant historical individual?
- How should significant individuals from medieval Europe be remembered?
- How were the lives of people at the time influenced by significant individuals?

In order to answer the inquiry question: 'What was life like for people in medieval Europe?', it can be useful to look at the impact that significant historical individuals had on the lives of people at the time and how they helped shape the history of medieval European society. As you work through this section, consider what qualities might be required for a person to be considered a historically significant individual. Reflect on what we can learn from these lives and about the ways in which an individual person can make a significant contribution to their society.

ACTIVITY 1.47

Research and presentation task

A range of important individuals made great contributions to the medieval world. Research a key individual and **create** a presentation to the class that will help them understand more about the important people and events in medieval history.

1 In groups, select one individual from Table 1.1 to research. Make sure you answer the following questions:

- Who did you research?
- Where did your individual live and make an impact?
- When did they live?
- What contribution did they make? What events were they involved in?
- How did they make a difference in the medieval world?
- Why is this person significant?

2 Find and present an image of your chosen person. Table 1.1 has some ideas to get you started.

- **Explain** where the image came from and who created it. Does it have an official title?
- **Identify** whether your chosen image is a primary or secondary source and explain what makes you say this.
- **Explain** how the image reinforces something you believe to be significant about the person.

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▼ **Table 1.1** Some significant personalities of medieval Europe

Richard the Lionheart  Thought widely to be a chivalrous king who rebelled against his father and fought Saladin in the Crusades	Saladin  A military genius who ended the 88-year rule of the Crusaders in the Holy Land, and was known as a virtuous leader	Joan of Arc  A French peasant girl who used voices from God to lead the French armies to victory over the English	Eleanor of Aquitaine  The queen of both France and England, and responsible for developing the ideas of chivalry
Pope Innocent III  The most powerful of medieval popes who controlled many European kings	Peter the Hermit  A popular priest who led the People's Crusade and was involved in the First Crusade	Christine de Pizan  A prominent poet and author, believed to be the first woman in medieval Europe to make a living as a professional writer	Marco Polo  The famed Italian explorer who travelled across Asia to China and returned
William Wallace  A Scottish rebel who fought and freed Scotland from English rule	Theodora  The ruler over a golden period of Byzantine history, and considered to be one of the most powerful women of the medieval period	Marie de France  A writer and poet famous for challenging the Church's attitudes to women	Geoffrey Chaucer  A poet and writer known as the father of English literature and author of the medieval book *The Canterbury Tales*
Edward the Black Prince  A brilliant military commander who led and won a major battle when he was only 16 years old	Matilda of Tuscany  The most powerful woman in medieval history, who defended the Pope's land in Italy	Vlad the Impaler  A king known for his favoured method of execution, who became the inspiration for Dracula	Margery Kempe  A holy woman who challenged the Church through literature and was tried for heresy

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Groups can present to the class or share the information in an online space so that the class can read about and analyse the different figures.

3 After looking at each group's presentation, complete the following tasks on your own:

- **a** **Create** a timeline of medieval history and mark in the period when each person lived.
- **b** Briefly **summarise** on the timeline why each person was significant.
- **c** **Identify** which people you think made the biggest contribution in war and conflict. **Explain** why.
- **d** **Identify** which people you think made the biggest contribution in arts and culture. **Explain** why.
- **e** Carefully **examine** your responses and **explain** who you think was the most important individual in medieval history. Give reasons for your choice.

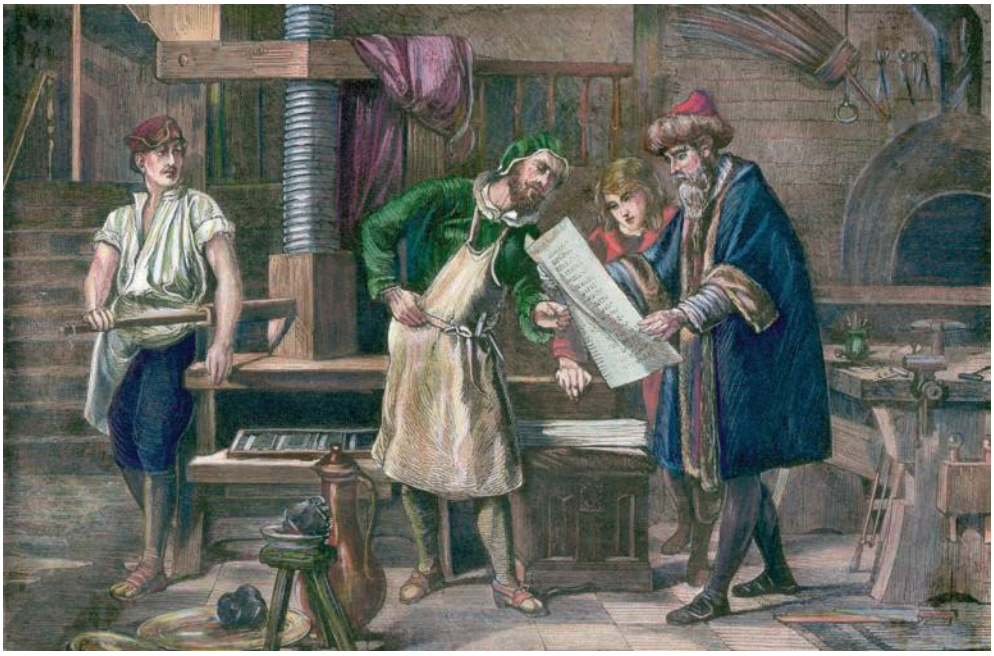


THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Significance.

Your response should contain:

- Identification of what elements are significant in relation to the content of the question
- A clear statement about the degree of significance (i.e. very significant, somewhat significant)
- Evidence from the sources to support this judgement of significance.



▲ **Source 1.99** Johannes Gutenberg (c. 1393–1468) was another famous person of the medieval period. He was a German inventor and craftsman who invented the printing press. His work led to an information revolution and the unprecedented mass-spread of literature throughout Europe. His major work, the Gutenberg Bible, was the first printed version of the Bible and has been acclaimed for its high aesthetic and technical quality. Undated illustration of Gutenberg in his workshop (depicted to the right of the image).

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ACTIVITY 1.48
MAKING THINKING VISIBLE

Podcast or role-play – 'Great lives of medieval Europe'

1 **Investigate** further into the life and career of a prominent individual from medieval Europe, such as one of those shown in Table 1.1.
2 **Use** your research to **create** a script for either a podcast of 1–2 minutes or for a role-play interview with this person, on the topic of 'Great lives of medieval Europe'. In your podcast or interview, **consider** topics such as:

- Historical context
- Early life
- Achievements
- How they were perceived by their contemporaries
- Why you think this historical figure deserves to be judged a 'Great life' of medieval Europe.

REFLECTING ON YOUR LEARNING 1.8

Reflect on what you have learned in this section:

1 Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the question: 'How did the actions of significant individuals impact the lives of people in medieval Europe?'
2 **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'What was life like for people in medieval Europe?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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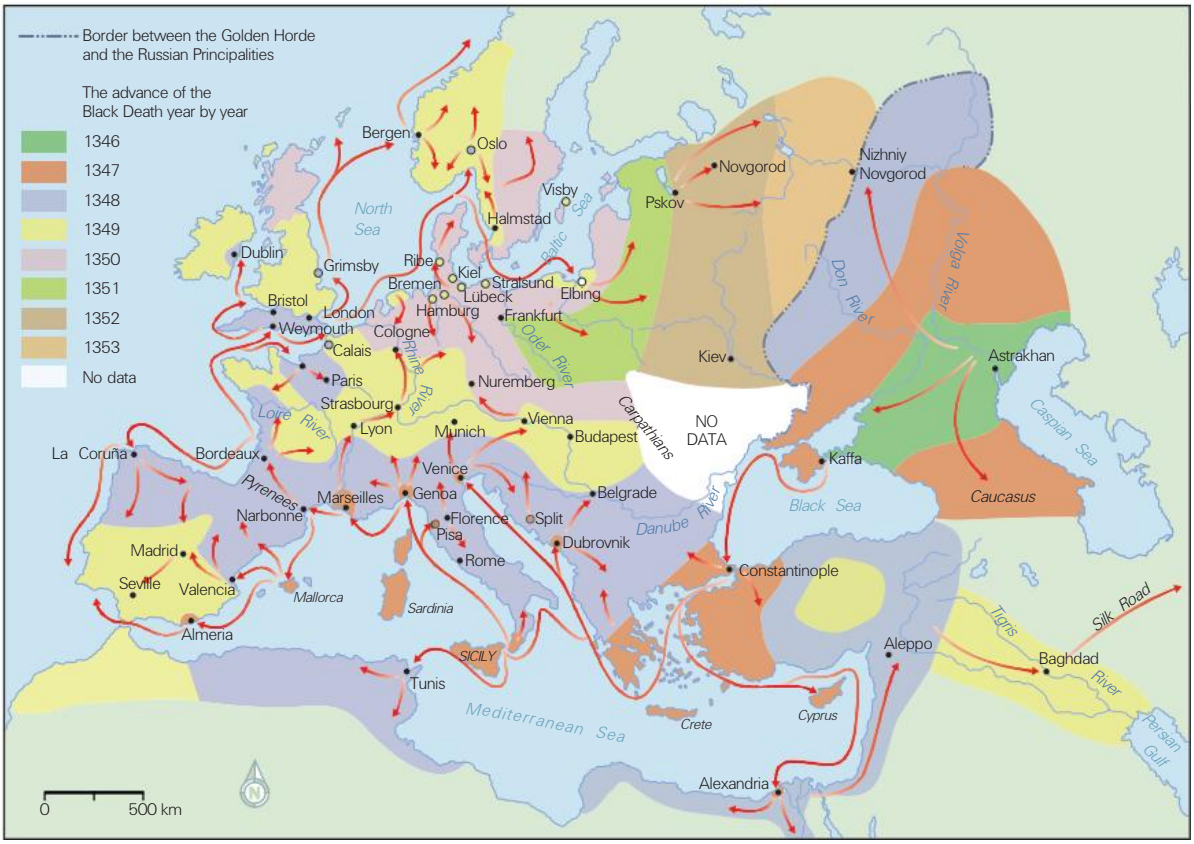
1.9 How did the Black Death impact life in medieval Europe?

FOCUS QUESTIONS

- How did the Black Death affect its victims?
- How did the Black Death spread so quickly through medieval Europe?
- How did people respond to the Black Death?
- What impacts did the Black Death have on religious practices in medieval society?
- What impacts did the Black Death have on the social order of medieval Europe?

In this section, you will learn about a disease known as the Black Death, a bubonic plague that spread through Europe from c.1347 CE to c.1352 CE, causing huge losses of life and having significant long-term impacts on medieval society and the feudal system. By 1351 CE, more than 25 million people were dead across Europe, approximately a third of the total population. Some modern estimates even suggest that as many as 50 per cent of Europeans were killed by this disease.

Just like the Coronavirus pandemic of the twenty-first century CE, the exact origins and causes of the Black Death are still unknown, though it is generally believed to have originated in Asia (either from China, or from central Asia) and carried along trade routes either overland or by sea, until it eventually arrived in the Italian city of Messina 1347 CE,



▲ **Source 1.100** A map showing how the Black Death may have spread through Europe

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from where it rapidly spread through the rest of Europe. The bacteria that caused the disease, *Yersinia pestis*, is now understood to spread from person to person through the air, or through bites from infected fleas carried by the black rats that were commonly found on ships.

As you read through the information and sources that follow, consider how the Black Death impacted those whose lives were touched by it, and what short- and long-term consequences it had for life in medieval Europe.

▲ **Source 1.100** How the Black Death may have spread through Europe

ACTIVITY 1.49
RESPONDING TO THE SOURCE

1 **Analyse** the video of the spread of the Black Death (Source 1.100). **Identify** which region of the world this video suggests the Black Death originated from.
2 **Describe** the path that the Black Death may have taken to spread from its location in 1346 CE to the city of Paris by 1348 CE.
3 Based on the information provided in this map, **determine** whether the Black Death appeared to spread more quickly overland or by sea. **Explain** why this might be the case.

How did the Black Death affect its victims?

The Black Death was a highly infectious disease. Victims were visibly identifiable by the black, pus-filled welts that appeared on the body, alongside the nausea, vomiting and fever common with the flu and pneumonia. The welts are knowns as buboes and they most often formed around the groin, armpits, and neck, and soon turned black. Internal bleeding would follow, and death usually came within three to five days. The Black Death was highly contagious, and few were exempt.

> … it first betrayed itself by the emergence of certain tumours in the groin or the armpits, some of which grew as large as a common apple, others as an egg … (then) spread itself in all directions indifferently; after which the form of the illness began to change, black spots or livid making their appearance in many cases on the arm or the thigh or elsewhere, now few and large, then small and numerous … almost all within three days from the appearance of the said symptoms, sooner or later, died, and in most cases without any fever or other attendant malady …

▲ **Source 1.101** A description of the contagious nature of the Black Death in Florence, Italy, by an eyewitness named Giovanni Boccaccio, who wrote a book titled *The Decameron* in c.1353 CE

> … It was a plague that touched people of every condition, age and gender. They began to spit blood and then they died – some immediately, some in two or three days, and some over a longer time. And it happened that whoever cared for the sick caught the disease from them or, infected by the corrupt air, became rapidly ill and died in the same way. Most had swellings in the groin, and many had them in the left and right armpits and in other places; one could almost always find an unusual swelling somewhere on the victim's body.

▲ **Source 1.102** A description of the contagious nature of the Black Death in Florence, Italy, by an eyewitness named Matteo Villani, who wrote a book titled the *Florentine Chronicle* in c.1363 CE. Villani lost his own brother Giovanni to the Black Death in 1348 CE.

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… nearly a third of mankind [died]. Moreover, by God's will, this evil led to a strange and unwonted kind of death … the flesh of the sick was somehow puffed out and swollen, and they dragged out their earthly life for barely two days. Now this everywhere attacked especially the [poorer] and common people; seldom the **magnates**. Men shrank from it so much that, through fear of contagion, sons … [would] not go and see their parents in the throes of death.

magnate wealthy and influential business owners in society

▲ **Source 1.103** A description of the contagious nature of the Black Death in Scotland, from the *Chronicle of the Scottish Nation*, written in c.1350 CE by an eyewitness named John of Fordun.



▲ **Source 1.104** This c.1349 illustration by Belgian copyist, miniaturist and bookbinder Pierart dou Tielt depicts the burial of plague victims in the city of Tournai, Belgium. Pierart dou Tielt created this illustration for the *Chronicles and Annals* of Gilles Li Muisis, the Abbott of Saint-Martin Abbey, Tournai. It is believed to be one of the earliest known images of the Black Death. No contemporary images of the Black Death that show the physical appearance of the symptoms are known to exist.



▲ **Source 1.105** Death strangling a victim of the plague. An illustration from the *Stiny Codex*, fourteenth century CE

ACTIVITY 1.50
RESPONDING TO THE SOURCES

1. Use Sources 1.101 to 1.103 to **describe** the signs and symptoms that could indicate that victims were suffering from the bubonic plague (the Black Death).
2. **Describe** what the people shown in Source 1.104 might be doing. **Explain** your answer.
3. **Interpret** the main idea of Source 1.105. Based on this source, **explain** how people in medieval Europe might have perceived the chances of survival for those who contracted a form of the Black Death.

How did the Black Death spread so quickly through medieval Europe?

Living conditions in medieval Europe, from the largest cities to the smallest village, were poor. They were places where rats, fleas and lice thrived. Sanitation and personal hygiene were relatively unknown concepts and disease bred easily. Tragically, as scientists later discovered, the Black Death was also an airborne disease. Ever since the Crusades,

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travel and trade around Europe had increased dramatically. People travelled along roads and rivers and between countries on boats, so those who sought to flee from the destruction of the Black Death may have unwittingly taken it with them to new locations.

Historians and sources from the time claimed that the Black Death was carried by rats, which to a certain extent was true, as was the notion that the fleas living on those rats had it too. However, a 2013 archaeological dig in England that uncovered the bodies of plague victims discovered evidence to suggest that it was most likely spread by inhaling the germs of coughing and spluttering victims. This was not known at the time.

In 1363 CE, French physician Guy De Chauliac was one of the lucky few to survive the Black Death – either by a genetic immunity to the disease, or sheer luck – and recorded the progress of the disease:

> The great mortality appeared at Avignon in January, 1348, when I was in the service of Pope Clement VI. It was of two kinds. The first lasted two months, with continued fever and spitting of blood, and people died of it in three days. The second was all the rest of the time, also with continuous fever, and with tumours in the external parts, chiefly the armpits and groin; and people died in five days. It was so contagious, especially that accompanied by spitting of blood, that not only by staying together, but even by looking at one another, people caught it, with the result that men died without attendants and were buried without priests. The father did not visit his son, nor the son his father. Charity was dead and hope crushed.

▲ **Source 1.106** Eyewitness French physician Guy De Chauliac's description of the Black Death, in his *Great Surgery*, written in 1363 CE

Another description of the spread of the Black Death was recorded in 1353 CE by Florentine scholar Giovanni Boccaccio:

> … merely by speech or association with the sick was the disease communicated to the healthy … any that touched the clothes of the sick or anything else that had been touched … (caught) the disease.

▲ **Source 1.107** A description of the contagious nature of the Black Death in Florence, Italy, by an eyewitness named Giovanni Boccaccio, who wrote a book titled *The Decameron* in c.1353 CE

Such was the scale of death, that bodies were dragged out of the house each morning to be buried, as one observer in c.1370–1380 CE noted:

> All the citizens did little else except to carry dead bodies to be buried … At every church they dug deep pits down to the water-table; and thus those who were poor who died during the night were bundled up quickly and thrown into the pit. In the morning when a large number of bodies were found in the pit, they took some earth and shovelled it down on top of them; and later others were placed on top of them and then another layer of earth, just as one makes lasagne with layers of pasta and cheese.

▲ **Source 1.108** A description of the effects of the Black Death in Florence, Italy, by an eyewitness named Marchionne di Coppo Stefani, who wrote his *Florentine Chronicle* in c.1370–1380 CE

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ACTIVITY 1.51
RESPONDING TO THE SOURCES

1 **Identify** evidence from Sources 1.106 and 1.107 that indicates the plague was highly contagious.
2 **Interpret** what the author of Source 1.106 might have meant when he stated, 'The father did not visit his son, nor the son his father. Charity was dead and hope crushed.'
3 **Decide** which of the above sources suggests that the spread and impact of the plague was too fast for medieval cities and towns to cope with. **Justify** your answer by using evidence from a source.

How did people respond to the Black Death?

Medical knowledge in medieval times had only very limited understanding of how the plague worked and how to treat it. The following sources provide an insight into some of the medical cures and other actions people took to combat the effects of the plague.

If an ulcer appears … near the ear or the throat, take blood from the arm on that side, that is, from the vein between the thumb and the first finger … But if you have an ulcer in the groin, then open a vein in the foot between the big toe and its neighbour … At all events, bloodletting should be carried out when the plague first strikes.

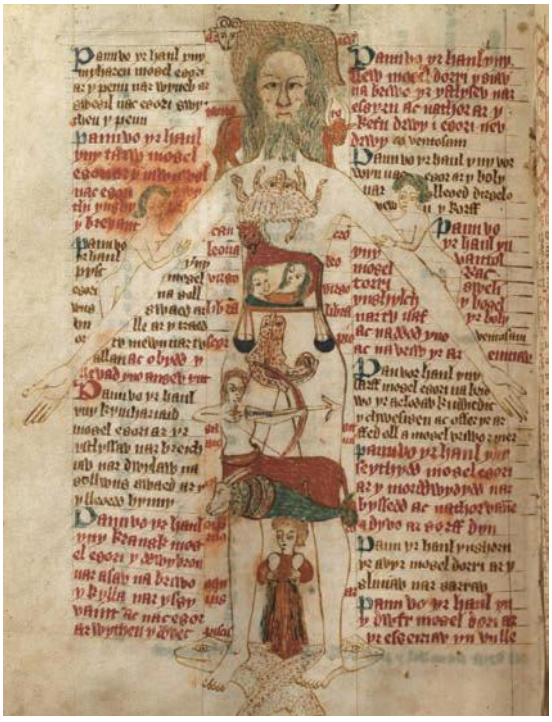
▲ **Source 1.109** An extract from a letter sent by a group of English doctors to the Lord Mayor of London in c.1350 CE

A medicine for the plague … take five cups of rue (a plant with strong-smelling leaves) … five crops of tansy and five little blades of columbine, and a great quantity of marigold flowers … Then take an egg that is newly laid, and make a hole in either end, and blow out all that is within. And lay it to the fire and let it roast till it may be ground to powder, but do not burn it. Then take a quantity of good treacle, and mix all these herbs with good ale, but do not strain them. And then make the sick drink it for three evenings and three mornings. If they [the sick] hold it, they shall have life.

▲ **Source 1.110** A description of the ingredients of a popular preventative medicine for the plague, from c.1480 CE

Some did not shut themselves in, but went about, some carrying flowers in their hands, some fragrant herbs … which they frequently smelled, thinking it good to comfort the brain with such odours.

▲ **Source 1.111** A description of the response to the plague taken by people in Florence, Italy, by eyewitness Giovanni Boccaccio, in c.1353 CE



▲ **Source 1.112** A diagram from a late 1400s CE Welsh manuscript written by an author named Gutun Owain, showing the 'zodiac man', a representation of the common belief in the fifteenth century regarding the link between astrology and medicine

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What impacts did the Black Death have on religious practices in medieval society?

Religion played a vital role in medieval life, so when the Black Death struck, it made many people question the will of God. Why had they been abandoned? What had they done wrong to deserve this? The lower clergy was decimated by the plague because they were often the first to tend to the sick. When the Black Death reached England in 1348 CE, whole monasteries were devastated and there were few left alive to support the peasants. The wealthier upper clergy, who could afford to flee, did.

ACTIVITY 1.52
RESPONDING TO THE SOURCES

1 **Examine** Source 1.109. Bloodletting was a common medieval practice. **Explain** what doctors might have hoped to achieve by doing this.
2 **Explain** how effective the preventative treatments mentioned in Source 1.110 and Source 1.111 might have been.
3 **Analyse** the image shown in Source 1.112. **Identify** the astrological signs and the regions of the human body they were associated with.
4 **Explain** what Source 1.112 might suggest about medieval beliefs regarding the relationship between astrology and medicine at the time.
5 The plague still exists in some parts of the world today. **Conduct** some research to find out how it would be treated today.



▲ **Source 1.113** A medieval depiction, from c.1350 CE, of flagellants or 'Brothers of the Cross' in the Dutch town of Doornik, from *The Chronicles of the French monk Gilles li Muisis*

In a world where the role of the Church was never questioned, this caused great confusion. Pope Clement VI, who survived the worst of the plague in Avignon, France, spent his time sitting between two huge fires, day and night. His doctors believed that the heat and smoke

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would prevent the disease from getting near him. Although Clement survived, a third of his **cardinals** died.

Religious **zealots** called **flagellants** would roam the streets whipping themselves with spiked ropes – drawing blood in the process – in the hope that God would forgive them and spare them from death.

Sir Robert of Avesbury watched 600 flagellants converge on the streets of London in 1349 CE (see Source 1.114).

cardinal leading dignitary of the Roman Catholic Church, nominated by the Pope

zealot person who is fanatical in their beliefs

flagellant person who whipped themselves as a form of self-punishment, hoping God would forgive their sins

> Each had in his right hand a scourge with three tails. Each tail had a knot and through the middle of it there were sometimes sharp nails fixed. They marched naked in a file one behind the other and whipped themselves with these scourges on their naked and bleeding bodies.

▲ **Source 1.114** Sir Robert of Avesbury, a medieval English historian writing c.1349 CE, provides an eyewitness account of the flagellants arriving in London in his *History of the Wonderful Deeds of Edward III*.



▲ **Source 1.115** A medieval illustration of flagellants, from the *Nuremberg Chronicle*, c.1493 CE, by a German historian named Hartmann Schedel

What impacts did the Black Death have on the social order of medieval Europe?

The Black Death created chaos in feudal Europe. People were used to the safety and structure of daily life, and such indiscriminate death and destruction turned the world upside down.

With people dying by the millions, there were few left to tend to the land and pay tax. Whole farms and estates were left to ruin and waste as peasants dropped dead in the fields. This meant that those left alive realised their worth to the nobility and began to demand higher prices for work and goods. The Black Death did not change Europe immediately. Even though millions died and made the work of peasants more valuable, the wealth of the Church and monarchies remained. Many historians discuss the benefits of the Black Death because it began a slow, gradual end to feudal society and led to more enlightened thinking.

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In the following autumn a reaper [a type of farm labourer] was not able to be employed for a lower wage than 8 pence*, with his meals; a mower [another type of farm labourer] for not less than 10 pence*, with meals. Consequently, many crops wasted in the fields for lack of harvesters. But in the year of the plague, as has been said above, there was so great an abundance of every type of grain that almost no one cared for it.

Meanwhile the King sent orders into all the regions that reapers and other labourers should not [demand higher wages] than they had been accustomed to take, under the penalty appointed by statute. But the labourers were so empowered and stubborn that they would not listen to the King's command, … if anyone wished to [employ a labourer] he had to pay them what they wanted, … either lose his fruit and crops, or satisfy the lofty and greedy wishes of the workers … afterwards the king had many labourers arrested, and sent them to prison … Their ringleaders were made to swear that they would not take daily wages beyond [what they had been traditionally paid], and then were freed from prison. And the same was done with the other craftsmen in the regions and villages …

After the plague, many buildings, great and small, fell into ruins in every city, region, and village due to a lack of inhabitants, likewise many villages and hamlets became deserted, not a house being left in them, all having died who dwelt there; and it was probable that many such villages would never be inhabited [again].

* 8 pence in medieval England may have been approximately AUD $40 today; 10 pence in medieval England may have been approximately AUD $50 today

▲ **Source 1.116** An adapted version of the description of the effects of the Black Death on peasant workers, farms and landowners, from the *Chronicle* of a monk named Henry Knighton, written c.1398 CE

That every man and woman of our kingdom of England … who is able bodied and below the age of sixty years, not living by trade nor carrying on a fixed craft, nor having of his own the means of living, or land of his own … shall be bound to … take only the wages … [that] were paid in the twentieth year of our reign of England [1346 CE] …

▲ **Source 1.117** An extract from the *Statute of Labourers*, a law passed by the English parliament in 1351 CE in response to labour shortages in England. The law was ultimately unsuccessful.

Civilization both in the East and the West was visited by a destructive plague which devastated nations and caused populations to vanish. It swallowed up many of the good things of civilization and wiped them out … Cities and buildings were laid waste, roads and way signs were obliterated, settlements and mansions became empty, and **dynasties** and tribes grew weak. The entire inhabited world changed. **The East**, it seems, was similarly visited, though in accordance with and in proportion to [the East's more affluent] civilization.

dynasties family lines of rulers

the East the Islamic regions of the Middle East and North Africa

▲ **Source 1.118** A description of the effects of the Black Death on Europe and the Islamic world, by the Arab historian Ibn Khaldun. Ibn Khaldun, who was from northern Africa, personally experienced the effects of the Black Death as a teenager with the death of his parents, which likely influenced him to write his historical work known as the *Muqaddimah* (meaning 'Introduction') in around 1377 CE. Approximately a third of the population of the Islamic world died due to the Black Death.

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garments clothing

florins a gold coin used in Florence, which became the most widely used form of currency throughout Medieval Europe

> The common folk, both men and women … would no longer work at their accustomed trades, but demanded the dearest and [finest] foods … and they married at their will, while children and common women dressed in all the fair and costly **garments** of the [upper-class] ladies dead by that horrible death [the plague] … Men dreamed of wealth and abundance in garments and in all other things … Serving girls and unskilled women with no experience in service and stable boys want at least 12 **florins** per year, and the most arrogant among them 18 or 24 florins per year … nurses and minor artisans working with their hands want three times [the] usual pay, and labourers … want to work the best [farms], and to abandon all other[s] …

▲ **Source 1.119** An adapted description of the social and economic effects of the Black Death on workers in the city of Florence, Italy, by an eyewitness named Matteo Villani, who wrote a book titled the *Florentine Chronicle* in c.1363. Villani lost his own brother Giovanni to the Black Death in 1348 CE.

ACTIVITY 1.53
RESPONDING TO THE SOURCES

1. In 1361 CE, the average daily wage for a labourer was approximately 3 pence. **Compare** this to the wages for farm labourers described in Source 1.116. **Determine** whether the wages of farm labourers appear to have increased or decreased as a result of the Black Death.
2. **Explain** why the wages of farm labourers might have changed in the years following the Black Death.
3. **Explain** what the King's response to the demands of farm labourers was. Use evidence from Sources 1.116 and 1.117 to support your answer.
4. **Identify** which group in society might have convinced the King to take this action against farm labourers.
5. **Create** a mind-map, using evidence from Sources 1.116 to 1.119, to summarise the impacts that the plague had on local communities as well as on Medieval Europe as a whole.

The Black Death forced people to question authority for the first time. Many thought that the world would soon come to an end and became obsessed with death. A shift in social attitudes can be detected in the growth of medieval art that focused on the 'dance of death', which generally depicted skeletons dancing alongside the wealthy and the poor or leading them happily to their graves. Images such as these suggest there was a growing focus on making the most of human experiences, rather than those of religion and God. Nobles and peasants alike would have



▲ **Source 1.120** 'A Dance of Death' illustration from *Liber Chronicarum* by German artist Michael Wolgemut, 1493 CE

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been reminded that any amount of power or wealth gained in life was only temporary and that people from all classes of society would be equal in death.

The significant decline in population also meant people were more socially mobile than ever before. Peasants could become skilled craftsmen, craftsmen could become wealthy merchants, and the already wealthy merchants could buy their way into nobility. Birth was no longer the sole determining factor of social status.



► **Source 1.121** 'A Dance of Death' illustration entitled *The Emperor Visited by Death* by German artist Hans Holbein the Younger, 1538 CE

ACTIVITY 1.54
RESPONDING TO THE SOURCES

1 **Interpret** the possible messages that the artists who created Sources 1.120 and 1.121 intended to convey to their audiences.

2 **Explain** how Sources 1.120 and 1.121 might be used to help argue that the Black Death changed attitudes towards the Church and the feudal system in medieval Europe.

3 Using Sources 1.119 to 1.121 as well as the information and sources above, write a paragraph to **discuss** the following question: 'How did the Black Death contribute to the eventual collapse of the feudal system in Europe?'

THINKING DEEPER
HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Cause and effect.

Your response should contain:

- A clear identification of the causes and/or effects relating to the question
- A clear explanation of how the causes are connected to its effects (i.e. how one event or action led to an outcome or consequence)
- Evidence or examples to support this explanation of the relationship between cause and effect.

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ACTIVITY 1.55
MAKING THINKING VISIBLE

Chalk talk

Set up: Write the prompt on a whiteboard at the front of the classroom, or on butcher's paper: 'How were people's lives impacted by the Black Death in medieval Europe?'

Process: Think about your reaction to the prompt and record any ideas and questions. Review others' responses and add comments and questions. Take some time to review your notes and add to your prompts and responses.

Facilitate: Think about the type of responses you can add to the sheets – connecting ideas, building on ideas, commenting on what others have written, asking others to respond with more detail etc.

Share the thinking: What are the common issues and reactions? Were there any surprises? How has your thinking developed during the process?

REFLECTING ON YOUR LEARNING 1.9

Reflect on what you have learned in this section:

1. Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the question: 'How did the Black Death impact life in medieval Europe?'
2. **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'What was life like for people in medieval Europe?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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Conclusion: end-of-chapter reflection

STEP ONE: REFLECT ON YOUR SUB-QUESTIONS

At the end of each section in this chapter, you were asked to reflect on how the information in the section related to the overall inquiry question:

'What was life like for people in medieval Europe?'

For each of the sub-questions below, write a brief response (approximately two to three sentences) to the sub-question. Do you feel that you have a good understanding of each section?

- What was life like in Europe following the collapse of the Western Roman Empire?
- What was life like for a noble or knight in medieval Europe?
- What was life like for peasants in medieval society?
- What was life like for women in medieval society?
- What effect did religion have on the lives of people in medieval Europe?
- What was warfare like in medieval Europe?
- What were the Crusades and what do they reveal about life in medieval Europe?
- How did the actions of significant individuals impact the lives of people in medieval Europe?
- How did the Black Death impact life in medieval Europe?

(If you prefer a visual approach, you could to do this as a mind map instead.)

STEP TWO: REFLECT ON THE KEY INQUIRY QUESTION

Now, based on what you have learned in this chapter, write a short paragraph in response to the question: 'What was life like for people in medieval Europe?'

STEP THREE: FUTURE QUESTIONS

Based on your learning in this chapter, what questions do you have about medieval Europe?

Reflect on the questions you or your classmates raised at the beginning of the chapter at the end of the 'Setting the scene' activities. Have you answered most of these questions? Which questions have not been answered?

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End-of-chapter assessment

1 Project

Society in medieval Europe

A project assesses your responses to a single task, stimulus, question, situation or scenario that gives students authentic opportunities to demonstrate their historical knowledge, understanding and skills.

Scenario: The organisers of the Queensland Medieval History Festival have asked you to contribute a presentation on the topic of: 'Society in medieval Europe'.

Your task is to **create** a presentation that shows what we can learn from medieval sources about differences between the lives of peasants compared to the nobility in medieval Europe.

Genre: You may pick the genre you use to present the results of your research. Some suitable options are:

Feature article	Role-play interview	Website article
Speech	Podcast	Mini-documentary
Museum display	'Khan Academy' style educational video	PowerPoint presentation with voiceover on slides

Instructions

Step 1: Select one aspect of society in medieval Europe from the following list:

- Building materials and architecture
- Civic and guild culture
- Clothing and personal accessories
- Religious items and practices
- Household items
- Jewellery
- Recreation and games
- Musical instruments
- Crime and punishment
- Weapons and armour
- Writing material
- Food and dining
- Another topic negotiated with your teacher.

Step 2: Conduct research into your topic, including developing a key inquiry question, such as 'What does evidence of [your topic] reveal about what life was like for the peasants and/or nobility in medieval Europe?'

Step 3: Select 2–3 primary and/or secondary sources that relate to your investigation.

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Step 4: Analyse your sources using the table below.

What are the features of the source? • What is the source? (text type) • Who created it, and when? (origin) • What was happening at the time the source was made that is relevant to the inquiry? (context) • Is the source a primary or secondary source? • Why might this source have been created? (motive) • Who might have the source been created for? (audience)
How is this source useful for learning about society in medieval Europe? • What evidence does the source provide about your chosen topic? (explicit and implicit information) • Overall, how is this source useful for learning about the difference in life for peasants and nobility in medieval Europe? (usefulness)

Step 5: Select a genre for presenting your research: either a feature article or another genre of your choice.

Step 6: Create a presentation that:

- provides some details of the main features of your aspect of medieval European society
- provides some evaluation of what the sources for your topic might reveal about what life was like for the peasants and/or the nobility (possibly comparing similarities and differences).

Step 7: Create a reference list that includes references to at least FOUR sources of information that have contributed to your research.

Length: Written presentations should be around 400–600 words; spoken presentations should be around 2–3 minutes long and will be accompanied by a script.

Optional: You may wish to dress in costume and take on the character of people from your group in medieval society as part of your presentation. Alternatively, the class assessment could be presented as part of a 'Medieval Faire' or 'Night of the Notables' event.

2 Practice examination

Question: To what extent did the Black Death improve conditions for peasants in medieval Europe?

Using a selection of Sources 1.106 to 1.121 in Section 1.9, write a paragraph to present an argument in response to this question. Make sure you include in-text references, i.e. (Source X) where you refer to evidence.

Digital resources

Visit the Interactive Textbook or Online Teaching Suite to access:

- General Capability Project
- Interactive chapter Quiz
- Interactive Scorcher Quiz
- Videos, image galleries and other extra materials.



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UNIT 2

Early exploration: expanding contacts: discovery and exploration

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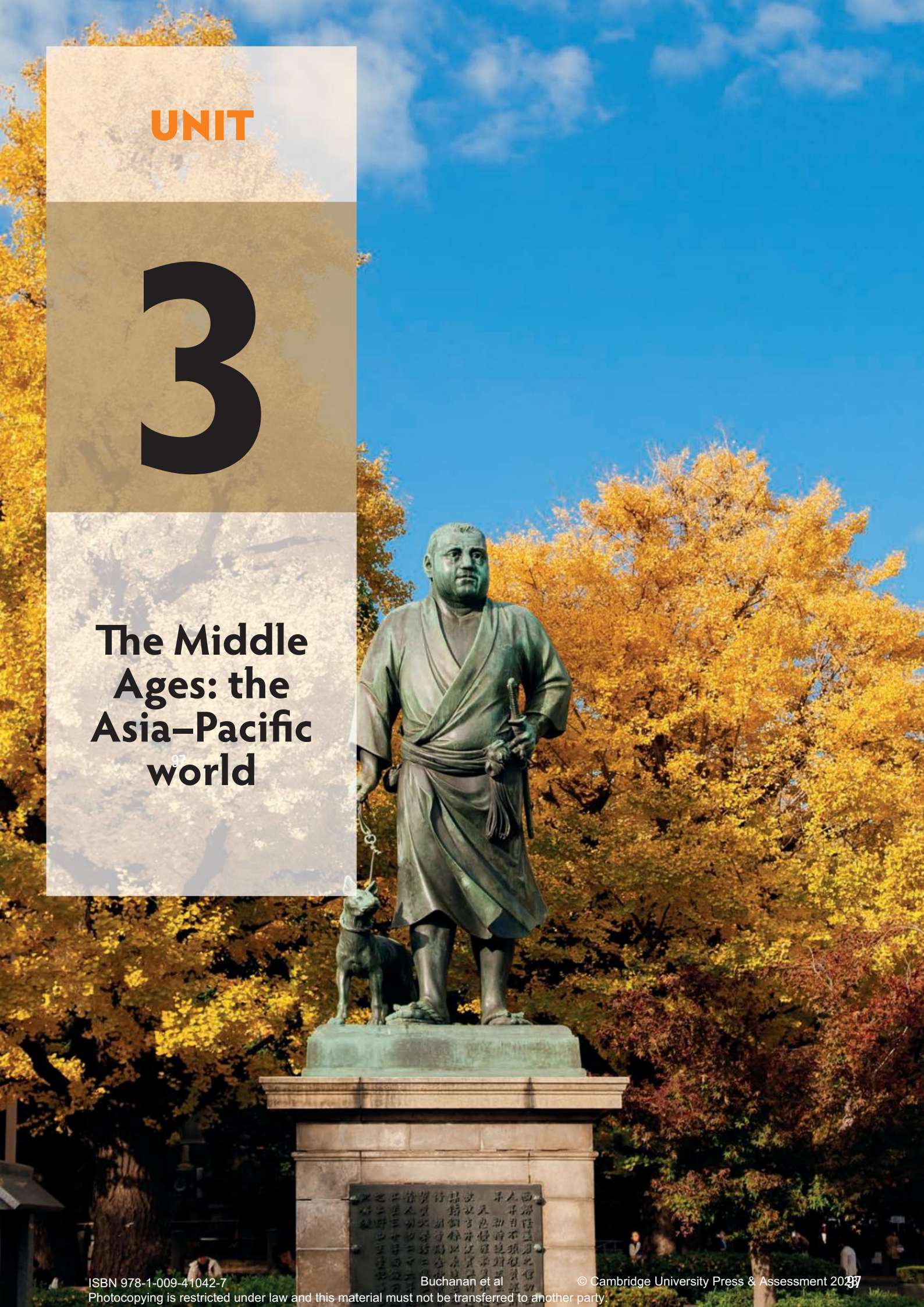
This unit is available in the digital versions of this textbook.

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UNIT

3

The Middle Ages: the Asia–Pacific world



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Overview

The Middle Ages were a time and place of great development, and not just in Europe and the Mediterranean. The Asia–Pacific civilisations of the Angkor/Khmer Empire, the Mongolian hordes, the Japanese samurai, and the Polynesians (as they spread across the Pacific) all changed the face of our region. These civilisations' impacts were widespread and continue to influence Australia and our relationships within the region today.

This chapter explores the effect Japan had on the East Asia region under the shoguns during the Middle Ages. You will investigate historical questions such as: how did Japan's way of life change over time? What were its significant developments and cultural achievements? Who had power and authority in ancient Japan, and did it change much over time? Who were the significant individuals and groups involved in Japan's modernisation? And what challenges did Japan's modernisers face? As you investigate this topic, think about the impact that this civilisation has had in your world today, and also think about any similarities and differences with European and Mediterranean civilisations of the same period that you have studied in Year 7 and/or in Year 8 History.

Learning goals

After completing this unit, you should be able to answer these questions:

- How did societies change from the end of the ancient period to the beginning of the modern age?
- What key beliefs and values emerged, and how did they influence societies?
- What were the causes and effects of contact between societies in this period?
- What were the perspectives of people from the time?
- Which significant people, groups and ideas from this period have influenced and shaped the world today?
- How and why have historians interpreted this period differently?

◄ **Source 3A** Statue of Saigō Takamori, one of the most influential samurai in Japanese history, in Ueno Park, Tokyo, Japan

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CHAPTER 3: Japan under the shoguns (c.794–c.1867)

Setting the scene: the death of the samurai and the dawn of modern Japan

We begin this chapter at the end of this historical inquiry. The following two stories tell of the anti-Western tensions in Japan at the end of the nineteenth century as it began to adopt Western modernisation. They also delve into the final days of the Satsuma Rebellion, the death of one of Japan's most significant *samurai* Saigō Takamori, while dawning a new modern era for Japan.

THINKING DEEPER

How would you describe Saigō's appearance in Source 2.1? Does he appear to strictly be dressed in Japanese samurai clothing, or would you say there is a blend with Western items? What perhaps might this suggest about his thoughts of the modern West and old Japan? Could this show that he perhaps believes that the old Japanese ways need to be preserved while adopting the best of the new modern ways of the West?



▲ **Source 3.1** Saigō Takamori (seated centre) surrounded by his officers, from a news article in *Le Monde illustré*, 1877

It is 14 January 1861. Henry Heusken is returning home from dinner on a bitterly cold Japanese winter evening. He is accompanied by three mounted officers and four footmen bearing lanterns as they make their

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way through the dark streets of Edo. They approach Nakanohashi bridge and pull their collars up to ward off the cold, when suddenly the party is ambushed by seven *shishi* anti-government samurai rebels from Satsuma domain. The samurai mutter the phrase '*sonojoi*' [meaning men of high purpose for the emperor and the samurai ways of old] under their breath as they close in around Heusken and his men. Swords are drawn and the tension is high. Heusken realises he is in mortal danger. But worse, he realises how diabolically dangerous the situation has become in Japan. The continued presence of foreigners like him has escalated tensions with the Japanese to the extent of brutal assassinations. Tonight, he is marked for death. As the first brutal strike bears down on his body, he mumbles a prayer to his God, unrecognised in Japan, and jumps into combat with these samurai. By the time the swords finish their gruesome work, Heusken is left suffering mortal wounds to both sides of his body. He mounts a horse and gallops approximately 200 metres to the American legation [an embassy of sorts]. There he is taken inside and treated. Early the following morning, he dies of his wounds.

Sixteen years later, samurai leader of Satsuma domain, Saigō Takamori reads carefully a letter in a dugout amid the chaos of war. It is 23 September 1877. The letter is from field marshal Yamagata of the newly formed Japanese Imperial Army, once a friend, now an enemy. The letter asks Saigō to surrender and cease the senseless slaughter. The war has already cost the imperial forces more than 6000 troops, while 7000 of the much smaller samurai army lay dead. However, Saigō's resolve is unshaken. 'Yes, too much blood has been spilled, but honour forbids surrender', he thinks to himself. He calls in his closest friends and spends his final night drinking *sake* knowing that the battle will commence at sunrise. By 6 a.m. the next morning, he is losing blood rapidly from wounds to his thigh and stomach from the battle that has already taken place. He realises he is close to death and embraces his fate. Saigō carefully selects a suitable spot to die. One of his most loyal followers Shinsuke Beppu carries him farther down a hill on his shoulders. Then, kneeling on the ground, Saigō thrusts his short sword through his stomach in the ritual act of *seppuku* and has Beppu cut off his head with a single sword stroke. At that point, Beppu and the last of the samurai draw their swords and plunge downhill toward the enemy positions until the last of them is mowed down by the imperial army guns. By 7 a.m., the Satsuma Rebellion is over, the samurai era is all but dead, and the greatest threat to the Meiji Restoration has been defeated.

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▲ **Source 3.2** Presentation of the head of Saigō to Prince Arisogawa, 16 October 1877 (Meiji 10) by artist Yamazaki Toshinobu

THINKING DEEPER

How would you describe the formality of this event shown in Source 3.2? Does it shock you? What intrigues you about this scene? Does the fact that the artwork was created only weeks after Saigō's death make this a more accurate source of information for historians?

ACTIVITY 3.1
MAKING THINKING VISIBLE

Claim, support, question

What does the story of the death of both Henry Heusken and Saigō Takamori tell us about Japan at the end of the 1800s?

1. Using the story, write a short paragraph on what this tells you about Japan at the time.
2. Make a *claim*, or claims, about what this tells you about Japanese life or society, or even the changing nature of Japan at the time.
3. Use a section of the story as your evidence to *support* your claim, or claims. Use a quotation from the text as your support.
4. Write a *question* about an aspect that you do not understand from the text, or that comes from your claim, or claims. This can form the basis for further research for homework beyond the classroom.

As you read these stories, they undoubtedly provoked questions in you. Questions such as: Why did some Japanese hate foreigners? Why did a modern Japanese army fight against a samurai army? Did all Japanese want to end the samurai? Or even, how did Japan change so dramatically from a place of samurai warriors to one of the most modern and technologically advanced countries in the world today?

These and many more interesting historical questions will be addressed in this chapter. All you will need is an inquiring mind to find out!

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Chapter overview

Introduction

The past, it has been said, is a 'foreign country' because 'they do things differently there'. As you can see from the opening stories, this is certainly true of premodern Japan. War was a common part of life both there and in Europe during the 'medieval period', and what was seen as 'normal' at that time – fighting for power, chopping off the heads of leaders, resisting foreigners or conquering territories – had considerable and sometimes devastating effects on their societies. As a result, medieval Japan is not one long period of time but is actually made up of three distinct periods: the *Classical Period*, the *Feudal Period* and the *Tokugawa Period*.

Historians often divide history in this way. However, society does not start and stop according to these blocks of time. For example, our modern-day cultures and types of society, as well as forms of government and even our ideas are based on what has come before us. That is not to say that we have not changed over time, as our society today is certainly different to Australian society 50 years ago, but it shows us that the past contributes to who we are today. In this sense, the past is always present.

Key inquiry question

'How did Japan change so dramatically from a place of samurai warriors to one of the most modern and technologically advanced countries in the world today?'

Every key inquiry question should have:

- An open interrogative
- A historical concept
- Specific content
- Scope and scale.

So, let's dissect this key inquiry question: 'How did Japan change so dramatically from a place of samurai warriors to one of the most modern and technologically advanced countries in the world today?'

To answer a key inquiry question in a historical investigation, it is helpful to break the question into sub-inquiry questions.

Sub-inquiry questions

To help you investigate the key inquiry question, the chapter is structured around the following sub-questions that will guide the historical inquiry:

- What role did geography play in the development of Japan's civilisation?
- How was Japanese society ordered under the shoguns?
- What were the significant influences on early Japanese society?
- What significant developments changed Japan throughout the Classical and Feudal periods?
- Why did Japan become unified under one leader by 1600?
- How did contact with the outside world irreversibly change Japan?

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Historical skills

After completing this chapter, you should be able to:

- **Use** historical knowledge, terms, concepts, sequence historical events and demonstrate the relationship between events and developments in different periods and places
- **Develop** historical questions about the past to **inform** historical inquiry
- **Locate** and **identify** primary and secondary sources to use in historical inquiry
- **Identify** the origin, content, context and purpose of primary and secondary sources
- **Identify** and **describe** the accuracy and usefulness of primary and secondary sources as evidence
- **Identify** perspectives, attitudes and values of people from the past in sources
- **Explain** historical interpretations about significant events, individuals and groups
- **Use** a range of communication forms (oral, graphic, written) and digital technologies to create descriptions, explanations and historical arguments that use evidence from a range of sources with correct referencing protocols.

▼ **Source 3.3** Himeji Castle, built in 1333, is probably the most famous of Japan's medieval-era castles today and one of UNESCO's World Heritage sites.

What features of the castle make it distinctly Japanese, or distinguish it from other castles you have seen before (perhaps European)?



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Timeline of key events

What came before this topic?

- The Jomon Period (c.5000–400 BCE) is broken up into two main sub-periods:
  - An initial stage of development (c.5000–2500 BCE) that included early pottery made by hand, a strong reliance on hunting and fishing, and trade with the Korean peninsula
  - A second stage of development (c.2500–400 BCE) in which more villages and a complex community developed, but gradually the Japanese population declined.
- Yayoi culture (c.400 BCE–300 CE) developed technological advances and larger communities that led to the development of clan-nations, which fought for supremacy.
- A very sophisticated society arose from the developments in Yayoi society, with advances in religion and in political structures (c.300–794 CE).



► Murasaki Shikibu (c.978–1014) writing *The Tale of Genji* at Ishiyama Temple

► The Great Buddha hall (*daibutsuden*), Todai-ji temple, Nara (UNESCO World Heritage List, 1998). This hall holds the 18-metre-tall, 500-tonne sitting Buddha bronze statue.



c.750 CE
Buddhism and Confucianism are key influences in Japan. Magnificent Buddhist temples are built.

c.1000 CE
Two of the world's first novels are written, focused on life in the Emperor's court: *The Tale of Genji* by Murasaki Shikibu and *The Pillow Book of Sei Shônagon*. Japan's first histories are written, the *Kojiki* and *Nihon shoki*.

710–794 CE
The Nara Period

The capital is located in Nara, a small town close to Kyoto, and a number of large Buddhist temples are built to protect the Emperor. A time of close ties with China

794–1185 CE
The Heian, or 'Classical', Period

A time of rapid cultural change strongly influenced by China, led from modern-day Kyoto

1185–1600 CE
The Medieval, or 'Feudal', Period, beginning after the Genpai War (1180–1185)

Japan is dominated by powerful military families, and the arts are highly decorated in style

Responding to the timeline

1 **Reflect on** your historical studies in Year 7. **Compare** the information in the 'What came before this topic?' section to the information you know about the civilisations you studied in Year 7. Are there similarities in the way ancient Japan changed and developed over time?
2 **Create** a list of questions that the timeline provokes in you. Then revisit these at the end of the inquiry to see if you have answered them.
3 Based simply on the limited information you have in the timeline, **compare** and **consider** which period(s) you assume were the most peaceful and which the most violent.

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What came after this topic?

- Japan industrialised and became a powerful state that was able to challenge and defeat Western powers (c.1868–1945).
- Japan built a large empire, and fought as an ally of Britain and France in World War I (1914–1918).
- Japan fought against Britain, the United States, and countries like Australia in World War II (1939–1945), after a surprise attack on the US naval base of Pearl Harbor, Hawaii, on 7 December 1941. Japanese carrier planes destroyed the base, killing over 2000 US troops, which provoked the United States into entering World War II. Japan hoped it would end the war in the Pacific quickly by knocking the United States out of the war, but it did the opposite.
- Japan quickly took over most of South-East Asia and much of the Pacific, and continued its brutal war in China, and their soldiers became infamous for committing atrocities. After the crucial Battle of Midway in June 1942, however, Japan began to lose the war.
- The United States dropped two atomic bombs on Japan in August 1945, at Hiroshima and Nagasaki. This is still the only time in world history that nuclear weapons have been used in war.
- The United States occupied Japan after World War II, and the country gradually redeveloped and advanced its economy and technology. Japan went on to become one of the United States' and Australia's major trading partners in modern times (c.1945–today).



▲ A painting from 1845 of Japanese warlord Minamoto no Yoritomo

1185–1333 CE
In the Kamakura Period, Minamoto no Yoritomo creates the first 'warrior government' or shogunate in 1193. The Minamoto family rules from Kamakura, a coastal town of Japan not far from modern-day Tokyo.

1336–1573 CE
In the Muromachi Period, the Ashikaga clan rules as the shoguns. They move the capital to Kyoto in the Muromachi district.

1543 CE
Europeans first arrive in Japan, known as '*namban*' (barbarians from the South). Zen Buddhism forms a major influence in Japanese society; Christianity is introduced to Japan, but it is banned in the sixteenth century.

1568–1600 CE
The Momoyama Period (or Azuchi-Momoyama Period) were the final years of the Medieval Period, which ended the 'Warring States' and Medieval periods, when 'three great unifiers' united the country by force under a military government.

1600–1867 CE
In the Tokugawa (Edo) Period, Japan is united under the Tokugawa clan and society is reorganised around four classes: samurai, farmers, craftsmen and merchants. Life centres on Edo (Tokyo), the new capital of Japan.

1633–1853 CE
Japan becomes a 'closed country' (*Sakoku*), opposing outside influences



► Screen printing depicting Portuguese ships, known as carracks, at the Japanese port of Nagasaki

1853 CE
Commodore Perry comes to Japan from the United States and forces Japan to open up trade to Western powers



▲ On 6 August 1945, an American bomber dropped the first atomic bomb ever used against an enemy city, striking the Japanese city of Hiroshima. The image shows the devastation in the city, as the bomb's explosion destroyed approximately 80 per cent of the entire city. Debate among historians still exists over the motivation of the United States for dropping this bomb – Did they need to end World War II quickly? Or show strength to a future enemy in the USSR in the coming Cold War?

4 **Decide** which event(s) on the timeline you think might have caused the greatest change(s) in Japanese society. **Explain** why.

5 After reading the section 'What came after this topic?', **consider** how this study and World War II (which you will learn about in Year 10) might be linked. **Explain** how the concept of cause and effect might be evident here.

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3

3.1 What role did geography play in the development of Japan's civilisation?

FOCUS QUESTIONS

- How do the Japanese believe their country began?
- What were the effects of Japan's geography on the development of its civilisation?

How do the Japanese believe their country began?

Creation or origin stories, mythology and folk traditions offer cultural insight into any country. And Japan is no exception. You will begin this contextual study by examining Japanese mythology to address the inquiry question: 'How do the Japanese believe their country began?'

ACTIVITY 3.2
MAKING THINKING VISIBLE

What triggers your interest most in this image? What questions does it prompt? Who or what could these figures looming over the ocean represent? What evidence is there in the image that suggests that the artist is Japanese?

Read, think, design

Read: Locate online a copy of Japan's creation myth (for instance, researching 'The Origin of Japan and her People' will lead you to a translation by scholars Donald L. Philippi and Joseph Campbell).

Think: As you read the myth, respond to the following:

1 **Describe** in your own words what things were created and who was responsible for their creation.
2 Let's make some assumptions. **Consider** Source 3.4 and the story of Japan's creation. You will notice that a spear was integral in the construction of Japan. What might this tell us? How might the value placed on military weapons influence the organisation of Japanese society? Who or what type of people do you think might have exercised power in early and feudal Japanese society based on the role of a military weapon in the construction of Japan in this origin story?
3 In most Western **monotheistic** religious traditions – such as Christianity or Islam – creation of all things was the responsibility of one all-powerful god. **Explain** what Japan's creation story suggests about its religious beliefs concerning the creation of all things. **Consider** whether this story leads to a belief in one god or many.

monotheism belief in one god

4 **Identify** in the myth any evidence that suggests that Japanese spirituality might be heavily connected to nature.
5 In this creation story, the 'sun' and 'moon' are female, and the storm-maker and emperor are male. **Describe** how this might influence attitudes towards gender roles in Japanese society.



▲ **Source 3.4** Painting by Kobayashi Eitaku, 1880–90 (Museum of Fine Arts, Boston) of Izanagi with the spear Amenonuhoko to the right and Izanami to the left

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6 **Identify** evidence from the image in Source 3.4 that represents this creation myth. **Discuss** your responses with a partner and make changes to your notes if needed from the feedback.

Design (this phase may work well as a homework task to consolidate learning beyond the classroom):

1 **Create** a Prezi account online (you may choose to use a different online presentation platform).
2 **Conduct** a search online in another tab using the key words 'Japanese Creation Myth + Prezi'. And look through how others have created a Prezi on this topic.
3 **Use** the information in the Japanese creation myth earlier and your responses to the questions above to **create** a Prezi of your own that addresses the following question: '*How do Japanese believe their country began*?'

Lastly, share your responses and presentations as a class, and **discuss** the role mythology plays in our lives. What myths do you know that help explain your existence? How different might your understanding of the world be without mythology or folk traditions?

What were the effects of Japan's geography on the development of its civilisation?

Japan is a state that is formed out of a series of islands, known as an **archipelago**. There are actually thousands of islands that form part of the Japanese archipelago, but the four main islands are *Hokkaido*, which is the furthest north, *Honshu*, which is the largest island and has the current capital of Tokyo, followed by two other major southern islands, *Kyushu* and *Shikoku*.

archipelago a group of islands



▲ **Source 3.5** Map of Japan

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ACTIVITY 3.3
RESPONDING TO THE SOURCE

1. Japan consists of four main islands. **Identify** Hokkaido, Honshu, Kyushu and Shikoku on the map in Source 3.5.
2. Revisit the timeline. **Identify** the capitals mentioned in the timeline. **Consider** the geography of the country and the location of each capital, and **decide** which capital you think offers the best position from which to rule the country. **Explain** why.
3. Japanese people traditionally have seen themselves as unique within the Asian continent – their food, their music, their arts, their language and their beliefs. **Determine** whether or not the geography of Japan supports this idea. **Identify** which countries Japan might be influenced by, if any.
4. Again, consider the geography of Japan, especially the fact that it is made up of a range of islands. **Decide** whether you would expect people in ancient and medieval Japan to see themselves as a united country or to identify more with their local area.
5. **Consider** whether you think that the geography of Japan would have made it harder or easier for other countries to invade it. **Explain** why.

THINKING DEEPER

Do you think being in control of food equates with power (political or economic) today?

Controlling which resources today might equate to power? Do you think it will always be this way?

Geography always affects the way that a country develops, because it has an impact on culture and society, as well as having an impact on how people live their lives. The available food and the types of topography (mountains, deserts, flood plains, rivers) affect *where* people settle and *how* they make their living. Much of Japan is covered with mountain ranges and forests, and there is only about 15 per cent of the land that is able to be farmed intensively or be used for large-scale agriculture. Yet the society that developed in Japan in medieval times was principally based on agriculture, with labourers or peasants working on the land and producing crops, rather than working in any kind of trade or business. They were also ruled over by the military class of society. This meant it was important to control the best agricultural land, and that the most powerful lords and nobles dominated areas of Japan that produced the most food. Being in control of food in medieval Europe or medieval Japan was a form of power.

Geography can also play a key role in defence, and Japan had not been successfully invaded until World War II, when it was occupied by the United States military. In the following activity you will explore a history mystery in order to uncover whether a **typhoon** was responsible for saving Japan from an invasion that could have changed the island nation forever!

typhoon
geographical term to describe a mature tropical cyclone that develops in the northern hemisphere

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ACTIVITY 3.4

Solving a history mystery – guided historical research

In this activity you will be guided through historical research – using the sources provided – to respond to the inquiry question: 'To what extent did typhoons save Japan from the Mongols in the thirteenth century?'

Mongols east Asian ethnic group native to Mongolia, who also live as minorities in other regions of China and Russia

1 Firstly, let's unpack the question: 'To what extent did typhoons save Japan from the **Mongols** in the thirteenth century?'
2 Understand that your inquiry question (like all inquiry questions) has the following features:

- An open interrogative
- A historical concept
- Specific content
- Scope and scale.

Historical concept: cause and effect

Scope and scale: Japan in the thirteenth century

To what extent did typhoons save Japan from the Mongols in the thirteenth century?

Interrogative: 'Did'

Specific content: from the mongols

Next, prepare in your notes or in a Word document a research table like the one below:

Source	Type of source: primary or secondary	Main points / key information or details	Explain in your own words how the source contributes to answering your inquiry question
Source 3.6			
Source 3.7			
Source 3.8			
Source 3.9			
Source 3.10			
Source 3.11			
Source 3.12			

3 Now, it's time to conduct research. You will interrogate (**analyse**, **interpret** and **evaluate**) the sources below and use evidence from them to draw your own conclusions in response to the inquiry question. Your teacher may break the class into groups, triads or pairs to complete this part of the task.

Interrogation step 1: Watch Source 3.6, by scanning the QR code, to familiarise yourself with this aspect and make your notes in the table.
Interrogation step 2: Read Source 3.7. **Consider** what information is the same or different from the video you just watched. Then add your notes to your table.

▲ **Source 3.6** 'The Mongol Invasions of Japan'

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Japan adopted a policy of isolation. The seas separating the islands from the mainland of Asia served as protective barriers against invasion. Kublai Khan, the Mongol emperor of China at the time of Marco Polo's visit, did try to conquer Japan. In 1281 he sent 900 ships and 25 000 Mongol soldiers to the islands. But the Japanese resisted fiercely, and were helped by a storm which sank the ships and drowned the soldiers. The Japanese called this storm ***Kamikaze***, or 'Divine Wind'. Several other early attempts to invade Japan from the mainland also failed. In 1592 the situation was reversed …

kamikaze 'divine wind', especially relating to the typhoon of 1281

▲ **Source 3.7** T. Walter Wallbank and Arnold Schrier's historical interpretation

Interrogation step 3: Read Sources 3.8 and 3.9. **Consider** what information is the same or different from the two sources you just interrogated. Is there any reason to believe one source more than another? Have any questions popped up yet for you about any of the information? **Discuss** them with your teacher and classmates. Then add your notes and thinking to your table.

Beyond China, Khubilai had little success as a conqueror … In 1274 and again in 1281, Khubilai also attempted seaborne invasions of Japan, but on both occasions typhoons thwarted his plans. The storm of 1281 was especially vicious: it destroyed about 4500 Mongol vessels carrying more than one hundred thousand armed troops – the largest seaborne expedition before World War II. Japanese defenders attributed their continued independence to the kamikaze ('divine winds').

▲ **Source 3.8** Jerry H. Bentley and Herbert F. Ziegler's historical interpretation

Mongol Invasions – During the feudal age, most fighting took place between rival warlords, but the Mongol conquest of China and Korea also threatened Japan. When the Japanese refused to accept Mongol rule, Kublai Khan launched an invasion from Korea in 1274. After a fleet carrying 30 000 troops arrived, a typhoon wrecked many Mongol ships. In 1281 the Mongols landed an even larger invasion force, but again a typhoon destroyed much of the Mongol fleet. The Japanese credited their miraculous delivery to the kamikaze, or divine winds. The Mongol failure reinforced the Japanese sense that they were a people set apart who enjoyed the special protection of the Gods.

▲ **Source 3.9** Elizabeth Gaynor Ellis and Anthony Esler's historical interpretation

Interrogation step 4: A series of scrolls were made at the time for a **samurai** warrior named Takezaki Suenaga, known as the 'Mongol scrolls'. **Explore** these scrolls in Source 3.10 using an online interactive provided by Princeton University.

samurai hereditary warrior class of Japan

a First, navigate through the interactive maps. Do they corroborate or contradict the sources you have read so far?

b Next, click on and read the 'Introduction' to the scrolls and note down any problem outlined or associated with the scrolls as historical sources.

c Then, click on the 'Guided View' and while navigating through this section, evaluate how reliable you think the scrolls are as evidence to help answer the inquiry question. Are they useful in any way for answering the inquiry question? If so, explain and add your thinking to your table.

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Interrogation step 5: Explore online an archaeologist's view on the inquiry after he conducted an underwater excavation. In Source 3.11, archaeologist James Delgado describes what the wreckage of one of the Mongol ships looks like today, where it rests on the ocean floor. What new evidence does this source reveal? Do you think it is more or less trustworthy than other sources so far? Why? Then add your notes to your table.

▲ **Source 3.10** Takezaki Suenaga, *Mōko Shūrai Ekotoba* (available in the Interactive Textbook)

Interrogation step 6: Lastly, **interpret** Source 3.12: a famous woodblock print. Although this source is not directly related to the historical event under inquiry, how might it offer supporting evidence when analysed in conjunction with the earlier archaeological source, or even the earlier text sources? Add your notes and thinking to your table.

▲ **Source 3.11** Archaeologist James Delgado's view on the inquiry (available in the Interactive Textbook)



▲ **Source 3.12** Woodblock print *The Great Wave off Kanagawa*, printed sometime between 1829 and 1833. *The Great Wave off Kanagawa* is a famous woodblock print by the Japanese artist Katsushika Hokusai. The image depicts an enormous wave threatening three fishing boats off the coast of the town of Kanagawa (the present-day city of Yokohama). The iconic Mt Fuji is visible in the centre background. The painting may depict a tsunami threatening Japan.

4 Now that you have done your research, you would have started to develop a provisional (not certain or final) answer to the inquiry question. **Discuss** your provisional answer with your classmates. See if you share similar historical interpretations – test each other's thinking by challenging points that you do not agree on. Who has the best evidence to support their thinking?

5 Finally, **use** your historical thinking and historical evidence from your research to write a short piece of historical fiction (200–400 words) that imagines what it might have been like for a Mongol soldier or a samurai as the Mongol fleet invaded Japan. Particularly **consider** what it would have been like on the boats that were destroyed in the great typhoon of 1281. *Publish* your work for your classmates to read (this could be done in a wiki or another cooperative online publishing tool).

Much of the population of Japan has traditionally settled in coastal areas. This is largely because of the ready availability of fish, and access to trade: goods were much easier to transport by sea than over the land. It also helped create a ready availability of soldiers from such a localised and large population in times of threat from other countries.

You would have learned from your research above that Japan experienced only two major attempts at invasion in earlier periods,

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by the Mongols in 1274 and 1281. The geography of Japan helped to defeat both invasions. However, it is not only typhoons that affect Japan. As a part of what is known as the Pacific 'ring of fire,' Japan has around 10 per cent of the world's active volcanoes. This means that Japan is prone to earthquakes and *tsunami*, or large wave surges, because of underwater seismic activity. These threats continue today. For instance, in 2011, a large earthquake off the coast of Japan caused a powerful tsunami to strike Honshu island and devastate the coastline, including causing damage to nuclear reactors and killing around 20 000 people.



▲ **Source 3.13** Image of the moment that a tsunami hit Japan in 2011. How does this image reflect the vulnerability of Japanese people due to their geography?

In this section, you have learned about the mythological beginnings of Japan, which offers ideas about why the Japanese live their life in close connection with nature. Additionally, you have conducted historical research to see how geography plays a significant role in Japan's way of life, especially in its defence against invasion over time.

REFLECTING ON YOUR LEARNING 3.1

Reflect on what you have learned in this section by doing the following:

- **Generate** a list of ideas and initial thoughts that come to mind when you think about this section's inquiry question: 'What role did geography play in the development of Japan's civilisation?'
- Sort your ideas according to how central or tangential they are. Place central ideas near the centre and more tangential ideas toward the outside of the page.
- Connect your ideas by drawing connecting lines between ideas that have something in common. **Explain** and write in a short sentence how the ideas are connected.
- Elaborate on any of the ideas/thoughts you have written so far by adding new ideas that expand, extend, or add to your initial ideas.

Continue generating, connecting, and elaborating new ideas until you feel you have a good representation of your understanding.

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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3

3.2 How was Japanese society ordered under the shoguns?

FOCUS QUESTIONS

- What was the structure of Japanese society and who had power?
- How did the social order impact on the lives of groups and individuals?
- How did the samurai warriors live?
- What were the roles and achievements of samurai women in a 'warrior society' like shogunate Japan?

What was the structure of Japanese society and who had power?

We begin exploring this question with a famous Japanese scroll called 'The Heiji Scroll'. The scroll dates from the thirteenth century. Let's see what it might reveal about the structure of society and who might have been important.



▲ **Source 3.14** Section of the Heiji Scroll

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ACTIVITY 3.5
RESPONDING TO THE SOURCE

1. The scene in Source 3.14 depicts the emperor being carried in the black carriage. **Explain** what the structure of the carriage tells you about the importance of the emperor.
2. **Explain** what the number of samurai warriors around the carriage tells you about the importance of the emperor. **Describe** what the scene tells you about the role of the samurai, in terms of their dress, weaponry and means of transport.
3. **Determine** why the carriage is covered completely. From the body language of samurai and the number of them accompanying the emperor, **consider** whether the scene appears calm or urgent. **Determine** to what extent you think the emperor's life might be in danger based on this scroll's depiction. **Describe** what you think is happening in the scene.
4. From Source 3.14 alone you can learn a lot of general information about the emperor and the samurai of the twelfth century. To learn more specifically about this event, **explore** the scroll in greater depth in its entirety using the online viewer from Princeton University (research Heiji Scroll Princeton University online).

As the Heiji Scroll in Source 3.14 suggests, the Japanese emperor was a significant figure in Japanese society. It seems from the scroll that perhaps he might even be the ruler, but we cannot be sure from this source alone. Let's see what two historians say about this in Sources 3.15a and 3.15b.

shogun military general

rubber stamp to approve or endorse something

3.15a Shelton Woods

The emperor reigned but did not rule – in fact it was the ***shogun*** and his deputies who governed Japan.

3.15b Jonathan Clements

The Emperor was little more than a '**rubber stamp**' of authority for the Shogun's policies.

▲ **Source 3.15a & b** Historians' views on the role of the emperor

ACTIVITY 3.6
RESPONDING TO THE SOURCE

1. **Explain** what both historians (in Source 3.15) say was the role of the emperor and the shogun.
2. Do both historians agree? **Explain**.
3. **Determine** who you think had the political and military power to rule in feudal Japan based only on what you know so far.

As the sources so far suggest, one of the key problems with understanding the Shogunate Period that began in 1192 is that the top level of society (the emperor) was not actually the most powerful person. Instead, this was the general or 'shogun'. The emperor did initially rule Japan in the Classical Period until at least the ninth century, with the **Imperial** Court being based in Heian-kyô (modern-day Kyōto). However, he then came to be dominated by the

imperial related to an empire or emperor

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generals, the shoguns, who actually ruled Japan while the emperor became a 'figurehead'. He still lived in luxury in his palace, and was considered the official ruler of Japan, but from the end of the Genpei Wars (1185) he was no longer actually in charge.

Japanese society across most of the period from 794–1867 was built around a *hierarchy* that was based on 'classes' or 'levels' of society. In this next activity you will explore this socio-political hierarchy further.

ACTIVITY 3.7

Working with hierarchies

Societies are organised around hierarchies. Social hierarchies usually relate to power – the most powerful at the top to the least powerful at the bottom. Social hierarchies are often represented in a triangle/pyramid, where the bigger populations make up the base levels and single powerful people often make up the top level.

Use the information in Source 3.16 to:

1 **Sequence** each level of feudal Japanese society in order from most powerful/high status at the top to the least powerful/low status at the bottom.
2 **Create** a social hierarchy (with summaries of each level) of your sequence of feudal Japanese society.

Peasants

The peasants were considered very low down in the feudal structure, although they formed the majority of the population (about 90 per cent). They were fishermen and farmers, as well as labourers (craftsmen or tradesmen/artisans), and they ensured the food supply of Japan. Peasants were considered to be in a vassal–lord relationship with the samurai and daimyo, where they owed duties (food) to the higher levels of society and received protection in return.

Daimyo

The ***daimyo*** were powerful feudal lords (often referred to as warlords) who were owed loyalty by those they controlled, including their own samurai warriors, who served particular powerful families. The daimyo were in control of their own region and able to tax these areas of land.

daimyo feudal Japanese lord, roughly equivalent to a medieval European duke or earl

Merchants

Merchants were considered to have the lowest status in Japanese society – lower even than peasants. This was largely because they were not seen as producing or creating anything new, but instead only made profit from other people's work by moving goods around. Nonetheless, merchants could be quite wealthy in medieval Japan. They may have had a lower social status than peasants, but they could also potentially live a much more luxurious and comfortable life.

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Samurai

The samurai were a warrior class in society. They were kept as private armies by the daimyo. They were considered to be at a very high level in society and could exert control over commoners. In order to ensure their loyalty, they were paid by the daimyo in either local currency, in rice (which they could trade) or in land.

Emperor

The emperor was at the top of the social structure. He was meant to be semi-divine, and technically was the ruler of the entire society. He appointed the shogun up until 1192 but thereafter the shogun actually ruled Japan. The shogun was unable to be dismissed by the emperor, who was only a figurehead and the shogun or the military determined the next shogun.

Shogun

The shogun was a military general who after 1192 was the head of government in Japan. The power of the shogun was often passed down within a family, meaning that in effect there was the dynasty of the emperor's family, and the dynasty of the shogun's family.

▲ **Source 3.16** Social groups within feudal Japan

3 **Analyse** your social hierarchy for attitudes and values. For example, what does it show or suggest about what was prized in Japanese feudal society and what was deemed of little value? Respond to these questions in a small paragraph written underneath your social hierarchy. **Compare** your work with your classmates, edit if necessary and submit to your teacher.

4 **Discuss** the following as a class:
   - **a** Why do historians find it useful to represent societies in this way?
   - **b** Would you like to live in a society similar to feudal Japan where your future was provided for or fixed, and little opportunity existed to change your social status? What might be the advantages and disadvantages?
   - **c** Do you think the roles of the military, merchants, tradespeople and farmers in modern Australia are valued differently from those in feudal Japan? **Explain** why.

How did the social order impact on the lives of groups and individuals?

THE WAY OF LIFE IN MEDIEVAL JAPAN: HOW DID THE SAMURAI WARRIORS LIVE?

One of the most common things that people think of when studying Japanese history is the samurai, the warrior class in Japanese society. This was a group that was highly considered in medieval Japan, and these warriors even took over the government of Japan from 1185 to set up a new system of warrior governments. As you learned in Activity 3.7, samurai were led in their respective domains by the daimyo, who were in turn lead by the shogun, a term that meant the leader of troops or the 'general who conquers the barbarians'.

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The samurai were meant to be bound by 'codes of honour' and live according to a set of rules known as ***bushido*** or 'the way of the warrior'; however, it is not certain that they always did. Many of the examples of such codes only come from the Tokugawa Period (1600–1867), a peaceful time when the samurai were becoming increasingly less relevant and important in society. Before this period of time, samurai would most often just obey the 'house rules' of their particular family. To understand this mind-set in the seventeenth century, here is how the samurai Yamamoto Tsunetomo described it.

bushido Japanese warrior code of conduct

> If one were to say in a word what the condition of being a samurai is, its basis lies in seriously devoting one's body and soul to his master. And if one is asked what to do beyond this, it would be to fit oneself inwardly with intelligence, humanity and courage.

▲ **Source 3.17** Extract from *Hagakure: The Book of the Samurai* by Yamamoto Tsunetomo, c.1716



THINKING DEEPER

How would you expect life to possibly change in Australia today if the military were to take over government and rule the country instead of civilian politicians?



ACTIVITY 3.8
RESPONDING TO THE SOURCE

1 **Identify** the qualities of a samurai as mentioned in Source 3.17.
2 The samurai were warriors. Do you think each of the qualities described in the *Hagakure* would be essential for a warrior? **Explain**.
3 **Describe** what you think this samurai might mean where he writes that a warrior should possess 'humanity'.
4 If you are wondering whether modern-day samurai still exist today and live by the code of bushido, research online using the following search words: '*Michiharu Mori Shihan*' + '*Aikido Yoshinkan*' + '*Brisbane Dojo*'. Read any relevant information, **decide** whether you think he has the same qualities that you identified in Question 1, and whether he might be viewed as a modern-day samurai. **Discuss** your thoughts with a classmate.



THINKING DEEPER
HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Change and continuity.

Your response should contain:

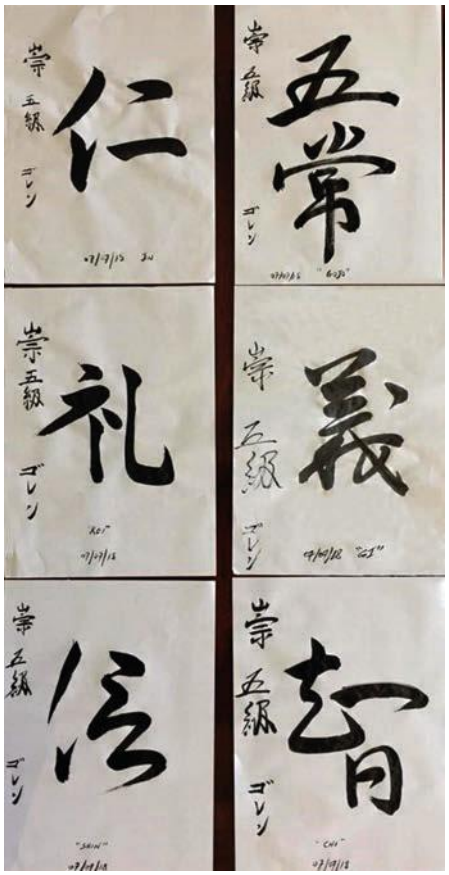
- A clear statement about what stayed the same and/or what changed
- Corroborating evidence or examples that show how things stayed the same (i.e. continuity)
- Differing evidence or examples that demonstrate how things changed
- A reason that accounts for this continuity.

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Jin (仁) = Benevolence / Humility

Rei (礼) = Respect

Shin (信) = Belief



Gojō = 5 natural habits/principles

Gi (義) = Righteousness

Chi (智) = Understanding

▲ **Source 3.18** Calligraphy of the five martial principles (Gojō) by Glen Henry, 2018

ACTIVITY 3.9
RESPONDING TO THE SOURCE

1 It is said that the *Gojō* were influenced by Chinese Confucian philosophy. **Consider** whether or not this Chinese influence makes sense based on what you have learned so far.

2 **Discuss** why you think these ideals or habits were an example every samurai had to follow. **Describe** what this might show about the samurai's character development and expectations placed on them by society.

3 It was said in feudal Japan that the *Gojō* outline 'the most natural traits of humans that must be maintained'. Do you agree? **Determine** whether you think they still apply today, and whether they are still significant for living a modern life.

4 The author of the calligraphy in Source 3.18 is Australian and is an expert martial artist in Kasumi Shinto Ryu Japanese swordsmanship and Shinto Muso Ryu Jojutsu. Does that surprise you? **Explain** what this suggests about the continued appeal of *bushido* or the *Gojō* as a set of principles on which to base a way of life. Does this support your response to Question 3?

THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Significance.

Your response should contain:

- Identification of what elements are significant in relation to the content of the question
- A clear statement about the degree of significance (i.e. very significant, somewhat significant)
- Evidence from the sources to support this judgement of significance.

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▲ **Source 3.19** Night Attack on the Sanjo Palace from the Illustrated Scrolls of the Events of the Heiji Era

Now we return to the Heiji Scroll (from the Kamakura Period) to investigate samurai armour and battle equipment further. The scene in Source 3.19 on the scroll is of an attack on a palace during a brief armed battle in the capital in 1159. As you study this source, consider that samurai armour was made from iron, copper, gold, leather and silk, and that some of the best examples from the twelfth and thirteenth centuries show that the samurai armour was carefully made by craftsmen, including dying leather red and covering some of the armour in silk.

ACTIVITY 3.10
RESPONDING TO THE SOURCE

1 One of the enduring myths about the samurai (especially in Western popular culture) is that they were all simply swordsmen. **Determine** the evidence that Source 3.19 provides to challenge this myth. **Identify** the primary weapons used in this battle.

2 **Describe** the armour depicted in the image. Does it match the material mentioned in the description above?

3 Why do you think samurai armour might have been designed this way? **Describe** the possible benefits.

4 **Explain** what this image tells us about Japanese warfare and how it was fought. **Consider** the differing experiences of the men on horses and the foot soldiers.

5 Often the daimyo would request gruesomely the 'proof of the death' of important enemy samurai to be brought back after the battle. **Identify** where there is evidence in Source 3.19 that suggests these samurai in the source were possibly bringing proof such as this.

THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Contestability.

Your response should contain:

- A clear identification of the interpretations of the past
- An assessment of the degree of corroboration or contestability between interpretations
- Evidence from the sources that illustrates the historical interpretations
- A judgement about which of the differing interpretations is best supported by evidence.

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As you probably realised from analysing the scene in Source 3.19, in battle samurai were mainly archers and horsemen. While there were sword fights that occurred between samurai warriors, the sword (or *katana*) was a secondary weapon to the bow; the sword was used for close combat. Everything about their armour was designed to ensure that they were protected, but also it was designed to ensure that they could promote their own importance and high status in society.

The samurai were a *social class* in Japanese feudal society, which meant that they were not necessarily defined by ability, but that they were born into this group and were meant to be defined as samurai by family background. Warriors were meant to train and be loyal to their masters, the noble houses or families that they served. This was supposed to ensure that their family remained 'honourable' and dedicated to only one lord. Their lord may have been the shogun (a general) or a daimyo (noble or lord). If a samurai did not have a master, he was known as a ***ronin***, or a 'wandering' warrior, and was treated as someone who had essentially been kicked out of society. This was because most ronin were rejected by their 'master' for committing a crime or acting improperly.

ronin samurai without a master, a wandering warrior

In a very famous Japanese story called *The Tale of the 47 Ronin*, set in 1703, a group of samurai become ronin because they lose their master (Lord Asano) when he is charged with a crime and executed. Instead of seeking a new master, they retain their loyalty. They attack the man who had caused Asano's death, and then take the head of this man to their master's grave to show that they have avenged his dishonour. According to many accounts, the ronin were then permitted by the government to commit ritual suicide (known as ***seppuku***) rather than be executed. The story has become a topic of Japanese popular culture and continues to influence many modern films around the world today. However, although it is well documented that this event actually happened, debate still exists among historians over the details.

▲ Source 3.20
The 47 Ronin

seppuku committing ritual suicide to keep a sense of honour – a samurai would painfully cut open their belly using their short sword while another samurai would quickly cut off their head ceremonially

Source 3.20, which you can access using the QR code, gives a more detailed explanation of the story. Source 3.21, in the Interactive Textbook, is a guided tour of the resting place of the 47 ronin in Sengaku-ji temple, Tokyo.

▲ Source 3.21
A Walk Through Sengaku-ji
泉岳寺

Stories such as *The Tale of the 47 Ronin*, and other collections of what were supposed to be the samurai code of bushido such as *Hagakure: The Book of the Samurai* (see Source 3.17), generally come from the

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eighteenth century. Based on the military principles of the 'Gojō' (see Source 3.18), writings from the late Medieval and Edo periods relating to bushido argue that the main values of the samurai were:

- Selfless commitment to their lord or master
- Continuing loyalty to their lord, even after his death
- The glorification of honour and preserving honour through your actions
- The belief that dying nobly was the ultimate goal of a samurai.

ACTIVITY 3.11

Attitudinal scale in a moral dilemma

1 In your class, **create** an attitudinal scale across the room from one end of the classroom to the other. At each end place the absolute opposing viewpoints:

These bushido values teach me nothing and are not appreciated or in any way relevant in modern Australian society today. And there are no words that can be substituted to make these values applicable or relevant to my life.		There is still much to learn from these bushido values. They are still relevant in modern Australian society for living a fulfilling life. And there are some words that can be substituted to make these values even more applicable to my life.

2 Each student will place themselves along the scale continuum. Various students will be asked to **justify** why they are standing where they are.

3 You will then have the opportunity to move after hearing the viewpoint of others in your class. Students will again be asked for **justifications**.



Are there any aspects of this figure that are different to the samurai we have studied so far? The samurai is clearly not wearing battle armour, but what can we learn about samurai attire in more peaceful times from this image?

◄ **Source 3.22** Illustration from the Meiji Period, late nineteenth century, inspired by *The Tale of the 47 Ronin*, showing 24-year-old samurai Kazuemon Masatane Fuwai (1679–1703)

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ACTIVITY 3.12

Developing historical skills and concepts: Identifying perspectives

To be successful in this activity you will have:

- Identified perspectives in sources that reflect the values and attitudes of the society that produced it, and accurately organised evidence of samurai values and behaviour found in sources into categories to support a historical judgement.

1 As you read Sources 3.23 to 3.25 below, you will practise *contesting* and *corroborating* perspectives. (Contesting is where sources on the same topic don't agree and differ in their evidence. Corroboration is where different sources agree or have common points/information. This is useful in judging – challenging or confirming – the *accuracy* of information.)

[The lord] Yorimasa [who knew that he would be captured by the enemy] summoned the samurai Watanabe Chujitsu Tonau and ordered: 'Strike off my head.'

Tonau could not bring himself to do this while his master was still alive. He wept bitterly. 'How can I do that, my lord?' he replied. 'I can do so only after you have committed suicide.'

'I understand,' said Yorimasa. He turned to the west, joined his palms, and chanted 'Hail Amidha Buddha' ten times in a loud voice. Then he composed this poem:

Like a fossil tree

Which has borne not one blossom Sad has been my life

Sadder still to end my days Leaving no fruit behind me.

Having spoken these lines, he thrust the point of his sword into his belly, bowed his face to the ground as the blade pierced him through, and died. Tonau took up his master's head and, weeping, fastened it to a stone. Then, evading the enemy, he made his way to the river and sank it in a deep place.

▲ **Source 3.23** Excerpt from *The Tale of the Heike*, 1330. *The Tale of the Heike* is the epic story compiled prior to 1330 of the struggles between the Taira (Heike) clan and Minamoto (Genji) clan for control of Japan at the end of the twelfth century in the Genpei War (1180–1185). This story is a classic example of Japanese literature assembled from scattered oral poems.



▲ **Source 3.24** Battle scenes from the Battle of the Heike, early 1600s. A famous series of panels from the seventeenth century that depict battle scenes from *The Tale of Heike*, showing that the samurai were deployed as cavalry (warriors on horseback) and the rapidity of the battles in this form of warfare.

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1 First of all, you should believe in the Buddha(s) and the gods.

5 Be righteous, show sympathy and respect. Be honourable.

7 You should do your hair early [as soon as you rise]. I need not tell you that this rule applies when you are to attend on your lord; but even when you must stay at home because you are not well or have urgent business to do, you should do your hair early, for you must not be seen in an ungroomed state by others.

13 If you have a little leisure, read books. But hide your reading matter in your breast-fold; in general, you should not let people see you read. But whether in bed or up and about, you must always practise writing; otherwise, you will forget how to read and write characters.

15 It is boorish and vile to have no poetic sensibility or skill, and you should study the art of poetry.

16 In your off-duty hours, practise riding. First you should become skilled in the essentials, and then practise the standard techniques for guiding the horse.

21 It is not necessary to write here about the 'Arts of Peace and War, including Archery and Horsemanship', for to pursue these is a matter of course. From of old, the rule has been, 'Practise the Arts of Peace on the left hand, and the Arts of War on the right'. Mastery of both is required.

▲ **Source 3.25** Extract of a selection of Samurai House Rules. Sometime after 1495, Hojo Soun, a daimyo, wrote articles as conduct guidelines for the people who served him. Many warrior leaders left instructions, but Soun's are especially interesting because he lived such a long life (1432–1519) and did many things. Soun composed his Twenty-One Articles sometime after 1495 as a code of conduct for all persons who owed him service. You will likely recognise elements of both Buddhism and Confucianism in the codes.

2 Using Sources 3.23, 3.24 and 3.25 (and any earlier sources studied in this chapter), complete the table below:

Source	Column 1 The source reflects a perspective of the samurai as heroic and courageous. Yes or no?	Column 2 Evidence from the source about samurai attitudes, values, behaviour and training that supports your judgement in Column 1	Column 3 If the source reflects a differing perspective of the samurai values to Column 1, briefly describe it below	Column 4 Evidence from the source about samurai attitudes, values, behaviour and training that supports your judgement in Column 3
Source 3.23				
Source 3.24				
Source 3.25				
Optional Source ___ (earlier studied)				
Optional Source ___ (earlier studied)				



THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Perspectives.

Your response should contain:

- A clear identification of the source's perspective
- Evidence from the source to demonstrate this perspective (note, this may include implied meaning)
- Discussion of how the source's origin or context may account for this perspective
- Discussion of how this perspective compares to other perspectives (in questions that use more than one source)

Consideration of how this source's perspective is useful in responding to the question.

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▲ **Source 3.26** The upper section of a samurai suit of armour

What do you notice about the mask and helmet? Do you think it was designed purely for safety, or could it be this way to impress fear on others? Do you think this armour would be as heavy, uncomfortable or difficult to move in as medieval steel plate armour?

Although the modern mythology of the samurai is of a dedicated and determined figure, who consistently acts in accordance with the wishes of his own leader, this has been disputed by historians. One historian, Harold Bolitho, in his book *The Myth of the Samurai* (1989), challenges this view of the samurai. Investigate his professional interpretation in Activity 3.13.

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ACTIVITY 3.13

Developing historical skills and concepts: writing a historical interpretation

To be successful in this activity you will have:

- Read and understood a historian's historical interpretation of what the samurai were like, and compared it to other ideas about the samurai, and subsequently, produced your own historical interpretation in the form of a paragraph that explains what it might have been like living in feudal Japan under the control of the samurai.

1 As you read Harold Bolitho's historical interpretation of the samurai in Source 3.27, **consider** the following questions:

- **a** What does Harold Bolitho say about the 'popular' view of samurai?
- **b** What does he argue the samurai were actually like, and what were they really interested in? To answer this, use the following stem: 'Historian Harold Bolitho argues that …'
- **c** How does this challenge the ideas of a samurai code or way of life? To answer this, use the following stem and insert a direct quote: Harold Bolitho challenges the ideas of a samurai code where he states '…'

> In the popular imagination Japan and the samurai are often synonymous. The samurai were – so the stereotype goes – the finest flower of Japanese civilisation, a class of professional fighting men devoted to the awesome ethical principles of their bushido code, totally loyal to their masters, indifferent to physical discomfort, ignorant of fear, and casually accepting of death … Apart from their masters … the samurai cared for nothing save their reputation; to preserve or salvage these all stood ready to take their own lives … [But] the samurai of the popular imagination is a myth. He never existed. … [From the ninth century to 1580] the samurai were at their most active… constantly fighting, getting ready to fight, or recuperating from having fought … [Most samurai] would have been semi-professional at best … They were 'bully boys' [and] there was no self-conscious military code – no bushido … Extensive lawsuits by samurai families over contracts and property disputes and ownership show what samurai were really interested in: land. Land meant crops, which in turn meant taxes, which meant wealth. For that matter, loyalty does not seem to have been a major consideration either … As can be seen in the genealogy of any warrior family, [samurai served] a whole succession of different masters, each one deserted in turn for someone more promising. They may not have been loyal, but they were certainly not stupid.

▲ **Source 3.27** Historian Harold Bolitho's interpretation of the samurai

2 Now write your own historical interpretation.

- **a** **Discuss** with your peers the following topic: Bolitho states in the source that the samurai 'were "bully boys" [and] there was no self-conscious military code – no bushido…'. Think about what it might mean if the toughest bullies you could imagine were in charge of your school – what would this mean for your school's organisation and your own school life?
- **b** **Consider** what it might have been like to live under the control of the samurai, and write a paragraph explaining what you think based on what you know from your study so far. (You may choose to agree with Bolitho or challenge him using other evidence from your inquiry.)

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The way of life in medieval Japan: what were the roles and achievements of samurai women in a 'warrior society' like shogunate Japan?

ACTIVITY 3.14

Developing historical skills and concepts: historical research

The general assumption in both popular culture and many histories is that only men were able to be warriors in Japan. Inquiry question: '*Were samurai women able to be warriors and fight in battle in feudal Japan too?*'

To be successful in this activity you will have:

- Developed questions to guide historical inquiry
- Analysed sources provided to gather evidence about the role and achievements of samurai women in feudal Japan
- Used this evidence to consider whether the above statement is correct and answered the inquiry question in a historical explanation.

1 Research questions to guide historical inquiry

In any research task in history, you should always **consider** these essential questions when you are looking at either a primary or secondary source, as these questions will help you to *analyse* the source itself and draw conclusions about its *usefulness* (evaluate).

- When? – When was it made? What does this tell us? Is it from the time that we are studying, or is it a later source?
- Where? – Where is it from? Where was it found (if we know)?
- What? – What is it? What does it say, or what does it show?
- Who? – Who wrote it or drew it or painted it? Who was the intended audience?
- Why? – Why was it made? Why did the person choose to do this?
- How? – How do you think it might have been seen at the time? How do you think it might have been received by the intended audience? How does this help us to understand this period of history?

2 The sources

Sources 3.28 to 3.32 will help you to research whether women were able to be warriors in Japan. When you **analyse** these sources, you should **apply** the questions above and **conduct** further research (including online) to help you understand these figures and their role in Japanese history, including whether you are able to trust this information or not.

Empress Jingu (c.200–269 CE) was believed to have dressed like a man in order to lead the Japanese army against Korea. In this speech, she is recorded as justifying to her generals why she should lead the army in war. This is recorded in the early Japanese history *Nihon Shoki*, written in the 700s, which also argued that she was the one who achieved victory in Korea:

> 'If I were to leave the whole conduct of the war in your hands, and you were unsuccessful, the responsibility would fall on your shoulders alone. But that I cannot bear. Although I am only a woman and unworthy of the post, yet it seems that I have the full approval of the gods, and the hearty support of all you officers and of the soldiers. It is for these reasons I venture to marshal the army, and share both the successes and failures of the undertaking.'

▲ **Source 3.28** Empress Jingu

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… authentic accounts of fighting women are relatively rare when compared with the immense amount of material on male warriors, [but] they exist in sufficient numbers to allow us to regard the exploits of female warriors as the greatest untold story in samurai history … The written evidence for samurai women being involved in actual fighting covers … different situations. The first was that of a defended castle where the commander was absent and the responsibility for defence had to be assumed by his wife. In nearly all such cases the castellans' wives' roles involved actual fighting as well as administrative duties.

▲ **Source 3.29** Extract from a history on samurai women

Consider Sources 3.30 and 3.31 together (the painting and text on Tomoe Gozen). Tomoe Gozen was a female samurai who not only fought in the Genpei War (1180–1185) but also commanded other samurai in battles. The image comes from a nineteenth-century painting. The text comes from a series of stories that are about the Genpei War called the *The Tale of the Heike*, c.1330. Carefully **consider** both dates when examining Tomoe Gozen.

Tomoe was especially beautiful … She was also a remarkably strong archer, and as a swordswoman she was a warrior worth a thousand, ready to confront a demon or god, [on a horse] or on foot … Whenever a battle was imminent, Yoshinaka [the leader] sent her out as his first captain, equipped with strong armour, an oversized sword, and a mighty bow; and she performed more deeds of valour than any of his other warriors. Thus she was now one of the seven who remained after all the others had fled or perished.

▲ **Source 3.30** Extract from *The Tale of the Heike*, 1330



▲ **Source 3.31** The painting *Lady Tomoe in Armour*, 1900

Historians continually assess and reassess history through the use of archaeology, including major projects that have been completed on medieval battlefields in Japan. At the site of the Battle of Kamakura (1333), archaeologists uncovered thousands of skeletons. They discovered that it appeared to have been a common practice to take the heads of defeated warriors as trophies and that many samurai on the defeated side apparently committed ritual suicide. They determined from the skeletons that at least one female samurai fought at Kamakura. At another battlefield, Senbon Matsubaru, the archaeologists discovered that one third of all samurai warriors on the field of battle were women. This was not a siege, but a full battle between opposing samurai armies.

▲ **Source 3.32** Reassessing samurai women

3 Communicating historical knowledge

Now answer the key inquiry question based on your interrogations of Sources 3.28 to 3.32 and any others you have located yourself. Write a historical explanation that responds to the

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inquiry question: 'Were samurai women able to be warriors and fight in battle in feudal Japan too?' Follow the steps below:

a Topic sentence: it must be a statement response to the inquiry question.

b Elaborate/reasoning: sentence(s) that support your topic sentence and add details that explain the reasons why.

c Support your reasoning: use evidence from your study of the sources earlier that support the elaboration/reasoning. You may like to use language like:

- Source _____ supports this where it states '…'.
- In support of this point, Source ___ shows ...
- Evidence from Source _____ and Source _____ both support the idea that (*your reason*). They agree that …

d Concluding sentence: link back to your topic sentence point and wrap up.

In this section you have explored the hierarchal nature of ancient and feudal Japanese society and pondered the idea of what it might be like if modern Australian society was controlled by a small group of military leaders. You have interrogated historical sources to investigate the debated topic of what samurai warriors were like and what they believed in. Additionally, you considered the dilemma over whether samurai values (bushido) still have a place in modern society, providing a way in which one may live a fulfilling life. Lastly, you conducted research into and made decisions about whether women in feudal Japan could be samurai warriors and fight in battle.

REFLECTING ON YOUR LEARNING 3.2

Reflect on what you have learned in this section by doing the following:

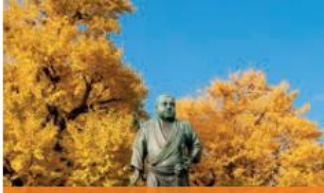
- **Generate** a list of ideas and initial thoughts that come to mind when you think about this section's inquiry question: 'How was Japanese society ordered under the shoguns?'
- Sort your ideas according to how central or tangential they are. Place central ideas near the centre and more tangential ideas toward the outside of the page.
- Connect your ideas by drawing connecting lines between ideas that have something in common. **Explain** and write in a short sentence how the ideas are connected.
- Elaborate on any of the ideas/thoughts you have written so far by adding new ideas that expand, extend, or add to your initial ideas.

Continue generating, connecting and elaborating new ideas until you feel you have a good representation of your understanding. Lastly, **explain** the best you can how your thinking here might contribute to answering your overall key inquiry question:

'How did Japan change so dramatically from a place of samurai warriors to one of the most modern and technologically advanced countries in the world today?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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3

3.3 What were the significant influences on early Japanese society?

FOCUS QUESTIONS

- How did intercultural exchange cause changes in Japanese language?
- What influenced writing in Japan?
- How did intercultural exchange influence Japanese religious traditions over time?
- What is Japan's indigenous religion and how did it influence society?
- What is Confucianism, and how has it influenced Japanese society?
- What has been the role of Buddhism in Japan?

How did intercultural exchange cause changes in Japanese language?

The geography of a country can also mean that it is affected by other nations or states that are nearby, as there can be intercultural exchange. This means that one country's culture is influenced by another country. A clear example of this is in language. Like the English language's Germanic influences, Japanese too has linguistic influences from another country: China.

CHANGE AND CONTINUITY: WHAT INFLUENCED WRITING IN JAPAN?

Kanji – These are characters that came from Chinese, which strongly influenced Japan in the Classical Period. Each kanji character conveys concepts or meaning.

kanji Japanese written alphabet that comes from Chinese characters

侍

samurai

▲ **Source 3.33** The word 'samurai' written in calligraphic kanji. Note how this kanji (like all kanji) are a collection of little character parts, which are called 'radicals', and when put together they convey a meaning. In this case 'to serve' or samurai.

Do you think a writing system of pictures, where meaning is enclosed in the character, is more or less rich than one that uses a phonetical script (an alphabet of meaningless letters)?



◄ **Source 3.34** This Japanese alphabet from 1690 shows the development of Japanese writing. On the left are the Chinese kanji characters, and the remaining characters are hiragana and katakana, which are only used in Japanese.

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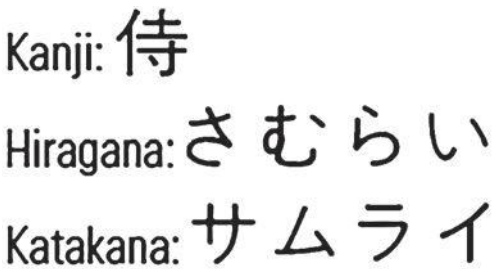
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In the absence of a writing system, the kanji or Chinese writing system was used to represent the existing Japanese spoken language. In this way, China's culture influenced Japan because the two countries are very close to one another – the geography of the region caused 'intercultural exchange'. There are about 2000 symbols in kanji that are used regularly.

hiragana Japanese written alphabet used to spell out kanji in syllables

katakana Japanese written alphabet for words that have been adopted from other languages

There are 46 core ***hiragana***, which are symbols that are much easier to write than kanji and are used to convey sounds. This script is used together with kanji to conjugate verbs. Hiragana is also used to write out words phonetically (as they sound). ***Katakana*** is the third group of symbols, which are mostly used to convey foreign words in Japanese, such as loan words from English. It is also used for emphasis or onomatopoeia.



▲ **Source 3.35** The word '*samurai*' in *kanji* (top), *hiragana* (middle) and *katakana* (bottom) characters. The hiragana and katakana characters are much simpler to write than the kanji version of the word.

What do you notice about the parts (radicals) of kanji and the katakana script? How would you describe the visual differences between hiragana and katakana?



ACTIVITY 3.15
RESPONDING TO THE SOURCE

1 Look at Source 3.35. Do you think Japan could have developed its own hiragana and katakana without first adopting Chinese kanji characters?

2 What other influences might come through adopting another country's written language?



THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Cause and effect.

Your response should contain:

- A clear identification of the causes and/or effects relating to the question
- A clear explanation of how the causes are connected to its effects (i.e. how one event or action led to an outcome or consequence)
- Evidence or examples to support this explanation of the relationship between cause and effect.

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How did intercultural exchange influence Japanese religious traditions over time?

You will investigate this question using a summarising activity. The activity will be completed as you travel through the section and probe the differing religious and philosophical traditions in shogunate Japanese society. Be sure to keep up with the key terms as they are important to your historical understanding.

ACTIVITY 3.16

Developing literacy skills: summarising

To be successful in this activity you will have completed a summary table of key points on three significant influences on early Japanese society: **Shinto**, **Confucianism** and **Buddhism**.

1 As you read through the following narrative section and interrogate the sources provided relating to these traditions, complete the summary table below in your books or in a Word document. Title it 'Activity 3.16: Summarising Japanese religious traditions – How has religion been influenced in Japan?' and use dot points to *summarise* the information you have learned.

Shinto Japanese religion in which people worship past members of their family and various gods that represent nature

Confucianism religion based on the ideas of the Chinese philosopher Confucius

Buddhism religion that has a variety of beliefs, practices and traditions based largely on the teachings of Siddhartha Gautama (the historical Buddha)

Tradition	When introduced (and by who)	Key ideas	Possible long-term influence on Japanese society (its people and their attitudes and values)
1 Shinto			
2 Confucianism			
3 Buddhism			

2 At the end of this section, share your summary table with classmates to **compare** your notes and ideas across the three columns. Make changes if you identify any major inaccuracies.

WHAT IS JAPAN'S INDIGENOUS RELIGION AND HOW DID IT INFLUENCE SOCIETY?

We begin by investigating what two Harvard University professors say about the Japanese religion of Shinto. As you read these statements, think about what this tells you about early religion in Japan.

> Shinto is an indigenous religion of Japan. Its deities are called ***kami***. The kami may be **deified** human beings – that is, ancient heroes. They may be the gods of ancient myth. They may be natural phenomena, such as a striking tree, a huge boulder, a waterfall. In some eras of history, the Emperor has been considered a kami … The institutions of Shinto are called shrines.

kami Shinto deities (spirits)

deify to worship or regard as a god

▲ **Source 3.36a** Professor Helen Hardacre's description of Shinto

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> Even in the biggest cities in Japan, there are shrines everywhere … And inside the shrine (are) trees, potted plants, some boulders that had been brought there years ago, things that were reminiscent of nature. I think that in some ways Shinto has a certain reverence for nature … people try (to) bring something natural and consider it worth revering, if not actually worshipping.

▲ **Source 3.36b** Professor Theodor Bestor's description of Shinto

ACTIVITY 3.17
RESPONDING TO THE SOURCE

1. According to the experts in Source 3.36, **describe** what constitutes (makes up) *kami* in the Shinto tradition.
2. **Propose** a list of ideas about Shinto mentioned by the two experts that are similar – that they agree on.
3. **Explain** what the kami tell us about Japanese society and how people understood the world, including their emperor.
4. Think back to the work you did on Japanese mythology and creation earlier in this chapter. **Determine** whether or not there is a relationship between the origin story and the beliefs outlined here in the Shinto religion. If so, **describe** what it is.

You have probably worked out from the study of Source 3.36 that Shinto is a religious belief that is purely Japanese and is a kind of ancient Japanese worship of nature, including the sun goddess, and various gods connected to nature. The Shinto form of religion connects the emperor's family to the 'sun goddess' of early Japanese history, and means that the emperor is meant to be semi-divine.



▲ **Source 3.37** Ise, Japan, May 2005. Shinto priests hang the sacred ropes between 'God Married Stones' or 'Couple Rock'. They serve as a gate to the Okitama Shrine.

Which key tenet(s) from the list in the text might this image reflect?

The key tenets of Shinto are:

- **Family:** the tradition of placing importance on familial heritage and relationships; hence, births and marriages are important Shinto events
- **Nature:** love and respect of nature as sacred – being in touch with nature meant contact with the gods; for example, the celebration of the cherry blossom festival is still important in Japan today
- **Physical cleanliness:** literally with bathing and metaphorically with the removal of shoes inside homes or shrines to keep the world's impurities out
- **Festivals:** to honour the spirits and bring people together.

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In Shinto, humans become kami after they die and are revered by their families as ancestral kami. This is why followers of Shinto are expected to do their best to respect the connections with their ancestors, self, descendants and nature, and achieve the ultimate goal of fulfilment of life on earth.

This kind of religion is often called an 'animist' form of religion and is common in many parts of the world when we look at ancient religions. It may mean that people are actually worshipping a part of nature – the Ancient Egyptians worshipped the sun and the Nile River – or that they worship a god or hero that embodies a part of nature or even human life – the ancient Norse gods included Thor as the god of thunder and Freya as the goddess of love. There were no Japanese sacred texts for Shinto, but it was instead followed through rituals and rites.



▲ **Source 3.38** Masatsugu Okutani is a 25th-generation Shinto officiant – priest – with his family line dating back to the twelfth century.



THINKING DEEPER

How do you think that 'animist' religions like Shinto might have developed, and why do you think animist religions were so common in different parts of the ancient world?

What might this tell you about human worship behaviour?

What does being an animist tradition suggest about the importance of the Shinto religion in Japan?

WHAT IS CONFUCIANISM AND HOW HAS IT INFLUENCED JAPANESE SOCIETY?

There is some debate if Confucianism is really a religion or a philosophy that teaches people a way to live. It comes from China, and adherents are meant to follow the moral commands of the philosopher Confucius (551–479 BCE) to ensure virtue. The sayings of Confucius were preserved and passed down to adherents of his discipline, and many of the ideas that he promoted fitted with core tenets (beliefs) of Japanese society, such as obedience and respect for parents, loyalty to one's master and duty in one's position. In fact, as you learned earlier in this chapter, the *Gojó* are based on Confucian principles.

One key belief that Confucius held was that the nation should be founded on the core unit of the family, and that stability within the family

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THINKING DEEPER

It is said that Australian society is a classless society, unlike the rigid Confucian-like social hierarchy of feudal Japan. Would you agree? And, if so, do you think this a good thing?

would help to build a stable nation. Another was the strict obedience of and duty to the social hierarchy structure – if you were born a farmer, it was your duty to do your best in this role and not try to improve or change your social status, and the same is said for other levels of society. Confucianism has existed in Japan since the sixth century but it became particularly prominent in the Tokugawa period (1600–1867).

WHAT HAS BEEN THE ROLE OF BUDDHISM IN JAPAN?



▲ **Source 3.39** Statues of Confucius and his disciples at the Confucius Temple in Nagasaki, Japan

How would you describe the way Confucius and his disciples have been displayed in these statues? Why might people use statues to portray people for the future in a certain way? How accurately do you think statues might reflect someone's true character? To what extent could statues be used to project an inaccurate image over time?



▲ **Source 3.40** A bronze statue of preaching Buddha from the eighth-century Nara Period in Japan (710–794 CE)

What does the age of the statue tell you about Buddhism in Japan?

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The role of Buddhism has been varied since its arrival to Japan via China and Korea in the fifth century. From its introduction, Buddhism was able to co-exist with Japan's native religion Shinto quite cohesively. In fact, over time the two religions came to complement each other in Japanese society by playing different roles. Buddhism in Japan has long been associated with the sacredness of nature and the belief that enlightenment might be found through physical discipline and adherence to the 'Four Noble Truths':

- All life involves suffering
- Suffering is caused by desire
- Desire can be overcome
- The way to overcome desire is to follow the **Noble Eightfold Path**.

Noble Eightfold Path summary of the path of Buddhist practices leading to enlightenment

Source 3.41 is a personal account written in 1212 by a Japanese Buddhist monk named Kamo no Chômei. In it he tries to explain why he turned to Buddhism. As you read this passage, think about what this tells you about life in feudal Japan and the role of Buddhism.

> All is as I have described it – the things in the world which make life difficult to endure, our own helplessness and the undependability of our dwellings. And if to these were added the griefs that come from place or particular circumstances, their sum would be unreckonable … For thirty years I had tormented myself by putting up with all the things of this unhappy world. During this time each stroke of misfortune had naturally made me realise the fragility of my life … I became a priest and turned my back on the world … Since I fled the world and became a priest, I have known neither hatred nor fear. I leave my span of days for Heaven to determine … My body is like a drifting cloud – I ask for nothing, I want nothing.

▲ **Source 3.41** Japanese man Kamo no Chômei explains why he became a Buddhist monk.

'Zen' Buddhism, a Japanese form of Buddhism adapted from Indian and Chinese influences, values intuition and mindfulness gained through long periods of meditation. Followers of Zen study the sacred texts of Mahayana Buddhism. Dr Masunaga Reiho of Komazawa University explains in his book *Soto Approach to Zen* that it was Dogen Zenji who first brought this form of Buddhism to Japan from China in the thirteenth century, and taught people to free themselves from 'the illusion of ego' (1958, pp. 203–14). This was often achieved by Zen Buddhists through the study of riddles known as '*koan*'. Koan would offer Zen Buddhists the opportunity to free their minds from reason and help move beyond normal patterns of thought in the hope of experiencing flashes of insight.

Zen was favoured by the warrior class at this time. It was believed that through the disciplined study of Zen (in addition to martial arts), a warrior could develop intuition, focus and freedom from ego that would serve him well in the heat of battle. Through Zen, warriors also



THINKING DEEPER

Do you think the method of Buddhist study using koans is similar to historical inquiry?

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found an enhanced beauty in and an acceptance of impermanence – like the short-lived beauty of a cherry blossom or butterfly. This in turn aided samurai in coming to terms with the possibility of dying anytime while serving society in such a dangerous role.

In this section, you have studied the Chinese influence on Japanese language over time. Also, you have explored the three religious traditions of ancient and feudal Japan. You have completed a summary table in Activity 3.16 for your notes on the key dates and people involved in the traditions, the key ideas or tenets, and the influences these traditions might have had on people in Japanese society.

ACTIVITY 3.18
RESPONDING TO THE SOURCE

1. Using Source 3.41, **describe** in your own words what Kamo no Chômei says makes his life 'difficult to endure'.
2. Use Source 3.41 to **describe** Kamo no Chômei's perspective on the role of Buddhism. **Explain** what seems to motivate him to adopt its teachings.
3. **Describe** what we can learn implicitly (from what is not directly said – reading between the lines) about feudal Japanese life for everyday people from Source 3.41. (**Consider** your response to Question 1 too.)
4. Kamo no Chômei begins this account talking of natural disasters in Japan that he had seen, including typhoons and earthquakes. **Determine** to what extent you think post-traumatic stress disorder (PTSD) might play a role in him turning to religion. And, considering this, **decide** whether or not you think the samurai training in Zen Buddhism in addition to their military arts might have been used as a way of preventing PTSD.

REFLECTING ON YOUR LEARNING 3.3

Reflect on what you have learned in this section by doing the following:

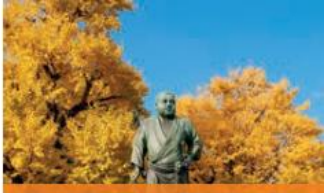
- **Generate** a list of ideas and initial thoughts that come to mind when you think about this section's inquiry question: 'What were the significant influences on early Japanese society?'
- Sort your ideas according to how central or tangential they are. Place central ideas near the centre and more tangential ideas toward the outside of the page.
- Connect your ideas by drawing connecting lines between ideas that have something in common. **Explain** and write in a short sentence how the ideas are connected.
- Elaborate on any of the ideas/thoughts you have written so far by adding new ideas that expand, extend, or add to your initial ideas.

Continue generating, connecting, and elaborating new ideas until you feel you have a good representation of your understanding. Lastly, **explain** the best you can how your thinking here might contribute to answering your overall key inquiry question:

'How did Japan change so dramatically from a place of samurai warriors to one of the most modern and technologically advanced countries in the world today?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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3

3.4 Power and authority in Japan: what significant developments changed Japan throughout the Classical and Feudal periods?

FOCUS QUESTIONS

- What were the major developments in Japan in the Classical Period? (794–1185 CE)
- What were the major developments in Japan in the Feudal Period? (1185–1600 CE)
- What changed as a result of the shift from rule by an emperor to rule by a shogun?
- What caused the shift of control back to the emperor and then on to another shogun in the Muromachi Period?

You will explore this inquiry question by organising your notes and your thinking using concept maps as explained in Activity 3.19. In this way the activity will guide your thinking and note-taking as you travel through the section and provide you with an opportunity to demonstrate your historical skill development while engaging with the narrative text and historical sources provided.

ACTIVITY 3.19

Concept mapping cause and effect

To be successful in this activity you will have identified clearly in graphic organisers:

- What you view as the chief causes for the changes across the Classical and Feudal periods
- The major effects of these changes.

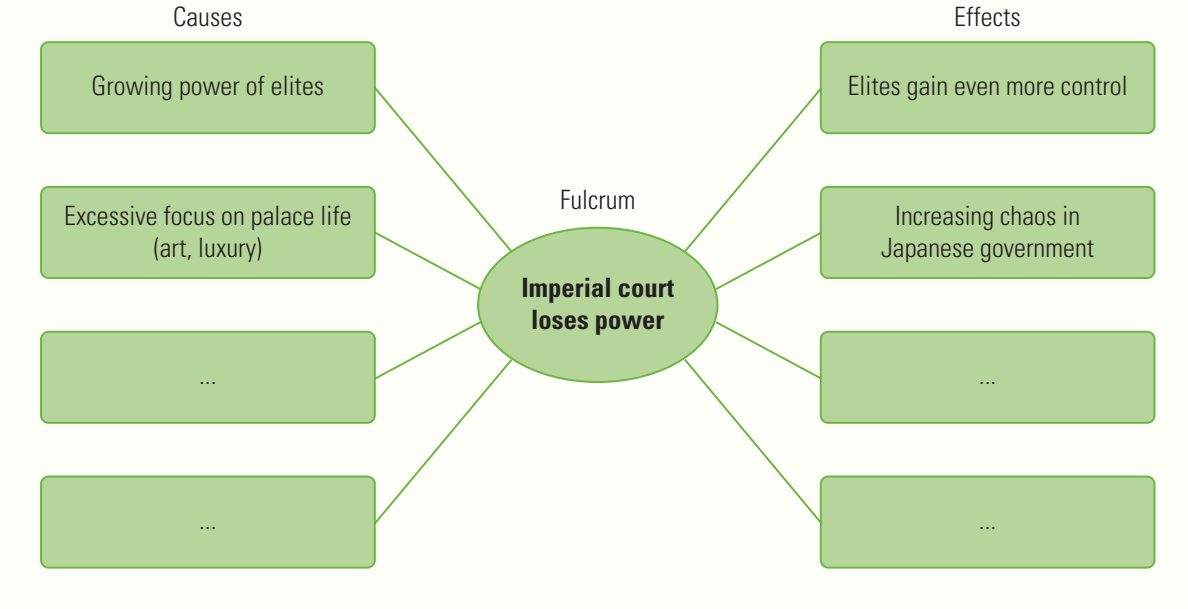
1 As you read through the narrative and interrogate the sources provided in this section, order your ideas/notes conceptually by completing graphic organisers (see example below) in your book or in a Word document.
2 Title the page/document 'Activity 3.19 Exploring cause and effect – What were the significant developments that changed Japan throughout the Classical and Feudal periods?'
3 Place the following major themes at the centre of your graphic organisers:
   - Imperial Court loses power
   - Rule by the shogun
   - Continuing warfare.

Examples to guide you – note that some suggested causes and effects have been provided to get you started. Repeat for the other themes listed above.

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What were the major developments in Japan in the Classical Period? (794–1185 CE)

THE HEIAN OR CLASSICAL PERIOD (794–1185 CE)

An example of the kind of life enjoyed by the Imperial Court in Heian-kyo (modern-day Kyōto) is recorded in what is widely considered the world's first novel, *The Tale of Genji*, written before 1021 CE by Murasaki Shikibu, a woman of the Imperial Court and the daughter of a court noble. The main character is Prince Genji, and the novel describes the life of the court in great detail, including the differing lives of men and women of the court.

Interrogate Sources 3.42 to 3.43 relating to the novel to explore further what life was like at the Imperial Court during the Classical Period.

The emperor paid a state visit … It was a most extraordinary event, the talk of the whole court. The preparations … were unprecedented in their complexity and in the attention to brilliant detail. Arriving late in the afternoon, the royal party went first to the equestrian grounds [to view the horses of the cavalry], and the inner guards were mustered for mounted review … There were [rich fabrics and woven materials] spread along the galleries and arched bridges and awnings over the open places when, in early afternoon, the party moved to the southeast quarter. The royal cormorants [a type of bird that dives for fish] had been turned out on the east lake, where there was a handsome take of small fish … The autumn leaves were splendid … Walls had been taken down and gates opened and not so much as an autumn mist was permitted to obstruct the royal view. The officers of the inner guards advanced from the east and knelt to the left and right of the stairs before the royal seats, one presenting the take from the pond and other a brace of birds taken by the royal falcons in the northern hills. … The court musicians took their place by late afternoon, by which time the wine was having its effect. The concert was quiet and unpretentious and there were court pages to dance for the royal guests.

▲ **Source 3.42** Extract from Murasaki Shikibu's *The Tale of Genji*

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ACTIVITY 3.20
RESPONDING TO THE SOURCE

1 **Explain** why the celebration described in Source 3.42 was so elaborate.
2 **Determine** the evidence in Source 3.42 that shows the Imperial Court was an impressive property and covered a huge area of land.
3 **Describe** the different aspects of this event, and **explain** what it tells us about the people who were a part of the Japanese Imperial Court. **Identify** at least four distinct groups and **describe** what they did in the court.
4 In your view, based on this extract, **identify** what was valued by the emperors and their Imperial Court. **Select** quotations from the novel to support your answer.
5 **Discuss** the following questions based on the last novel that you read. Where was it set? What time was it set in? When was it written? Could someone in the future use your novel to understand life at that time? **Discuss** how useful a novel written from the time, such as *The Tale of Genji*, might be as a historical source to understand the Heian Period. **Determine** what might be the problems for historians using a novel such as this.



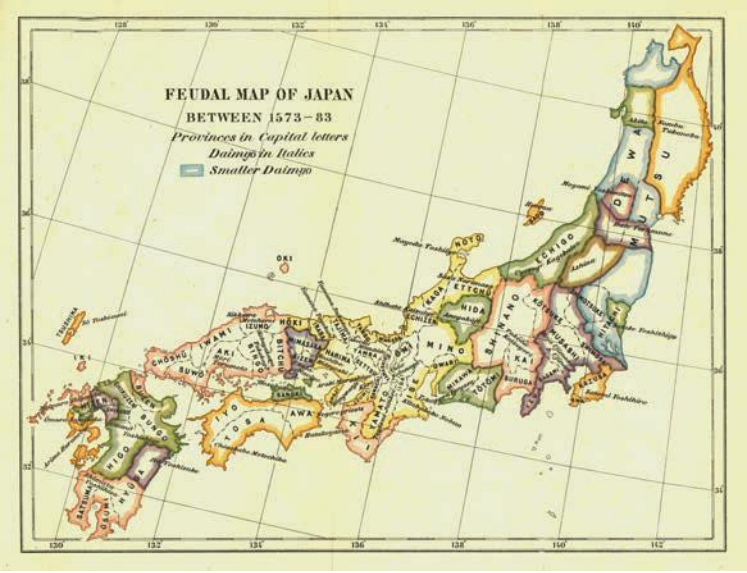
▲ **Source 3.43** A painting of the Imperial Court taken from *The Tale of Genji*, 1791

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ACTIVITY 3.21
RESPONDING TO THE SOURCE

1 **Describe** the scene in Source 3.43. For example, would you say the women in this scene are well dressed? Would you say they are actively engaged in tasks or lounging? Would you say the women could be there to entertain the emperor? Are the gardens and the landscape well looked after? Is the structure clean, tidy and well looked after? Would you say the people in the scene are behaving in a 'civilised' way?
2 Match elements of the painting in Source 3.43 with phrases from the novel in Source 3.42 that reflect them.
3 From your answers to Questions 1 and 2 and your analysis of Source 3.42, **determine** what we can assume life was like at the Imperial Court during this period.
4 The painting in Source 3.43 was created more than 700 years after the novel was written. **Determine** whether you think this makes the painting a less or more accurate reflection of life at the court. **Determine** to what degree your matching answers in Question 2 increase the reliability (trustworthiness and accuracy) of this source. **Explain** why.

As you have found out from your study of Sources 3.42 and 3.43, Japan in the Heian or Classical period was ruled by both emperors and empresses at the Imperial Court. This administrative system was based on models from China. The court devoted considerable effort to literature, art, theatre and culture. The culture of this period was extraordinary and had classical themes that continue today. This was a time when Japan moved from being a country that was considered 'uncivilised' by early visitors to a highly civilised and distinctive culture. While it was influenced by other countries, it created its own distinctive Japanese forms of art, poetry and architecture valued highly by people at the court. However, the difficulties that arose in this period of Japanese history were that the court became so interested in art and the refinement of poetry and literature that, arguably, the affairs of state (political control, military stability and the economy) were neglected.



▲ **Source 3.44** Japan (excluding Hokkaido and small islands) in feudal times, specifically 1573–1583

What do you notice about the number of provinces in such a small island nation? If each province was governed by a different daimyo with their own samurai army, how difficult do you think it would have been for the emperor to rule over the nation from their court in Heian-kyo without their support? Explain.

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The aristocrats were so caught up in the fine nature of their life that the Buddhist temples became powerful, and so too did individual military governors who controlled the provinces. While they were meant to respect the authority of the emperor, their power grew to the point where they formed a threat to the central government, and there was widespread dissatisfaction among the aristocrats, as well as general unrest in the last years of the Classical Period. This gave way to a time of warfare, out of which came the period when the shoguns ruled. Excessive taxation of various goods, particularly agricultural goods, only added to the problems faced by the court. The emperors and aristocrats who controlled the state lived a life of luxury, but they were about to be replaced.

What were the major developments in Japan in the Feudal Period? (1185–1600 CE)

Following a period of time in which the emperors ruled, the increasing power of the individual generals and their ability to control the state could not be ignored. However, the increasing conflict between two major families – the Taira (aka Heike) **clan** and the Minamoto (aka Genji) clan – in their attempt to control the emperor and the court led to a **civil war**. This was known as the Genpei War (1180–1185). The Minamoto clan was ultimately successful, and after this violent civil war it was clear that control by the samurai was the only real method by which Japan could be stabilised and ruled. This meant that Japan had a warrior government (***bakufu***) with warrior leadership almost continuously from 1192 through to 1867.

clan group who originally came from the same family and have the same name

civil war war within a country between its people

bakufu (or shoganate) military government ruled by the shogun

THE KAMAKURA BAKUFU (1185–1333 CE): WHAT CHANGED AS A RESULT OF THE SHIFT FROM RULE BY AN EMPEROR TO RULE BY A SHOGUN?

The first shogunate was known as the Kamakura government and it was ruled over by the Minamoto clan. The leader of this clan, General Minamoto no Yoritomo, was declared shogun. He led this change and shifted the government to Kamakura, which is south of modern-day Tokyo. Here is how Keiji Nagahara, Professor of History at Hitotsubashi University in Tokyo and author of *Minamoto no Yoritomo*, describes the change.

> Minamoto Yoritomo [was the] founder of the bakufu, or shogunate, a system whereby feudal lords ruled Japan for 700 years. Defying the emperor, Yoritomo established shugo (constables) and jitō (district stewards) throughout the Japanese provinces, thus undermining the central government's local administrative power, and in 1192 he acquired the title of supreme commander (shogun) over the shugo and jitō …
>
> Yoritomo gave his shugo, each placed in a province, the function of administering and policing the Minamoto vassals [daimyo] locally. The shugo also administered the judicial proceedings in cases of rebellion and murder, and they thus acquired something of a military hold over each province. To supervise individual estates,

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the more specific office of jitō was created, which levied taxes and undertook the management of the estates. And, not surprisingly, both the shugo and the jitō became feudal lords. Through these institutions, Yoritomo was thus able to undermine the central government's local administrative power, and subsequently he even made efforts to rule remote districts, such as Kyushu, Japan's southernmost island …

After 1192 Yoritomo's policies were designed to relieve the strain between the military lords and the court aristocrats, and the powerful temples and shrines. Thanks to the institutions of the shugo and jitō, relations between the court of Kyōto and Yoritomo's government at Kamakura were fairly stable.

▲ **Source 3.45** Historian Keiji Nagahara's description of the shogunate system



ACTIVITY 3.22
RESPONDING TO THE SOURCE

1 According to Source 3.45, **identify** what system of government changed Japan from the emperor's rule. **Identify** how long this system of rule lasted.
2 **Describe** what *shugo* and *jitō* were. **Explain** why they were established.
3 Use Source 3.45 to **evaluate** to what extent you think Yoritomo's establishment of shugo and jitō would have given him control of Japan. **Use** quotes from the source to support your response.

Now look at a primary source document (see Source 3.46) from the Kamakura Bakufu from the year 1199. It discusses the appointment of a man named Tomomasa as shugo.

Tomomasa has been appointed to the shugo post of Harima Province. The men of this province are to obey Tomomasa, perform the imperial guard service, and in general show their loyalty. Tomomasa's authority is limited to rebels and murderers; he is not to interfere in provincial administration … And he is not, under any pretext, to cause difficulties for the nobles of this province.

▲ **Source 3.46** Extract from Kamakura Bakufu (military government)



ACTIVITY 3.23
RESPONDING TO THE SOURCE

1 **Create** a list of the duties (what he can and cannot do) that Tomomasa has been given according to the instructions in Source 3.46 from the Kamakura government.
2 **Explain** how Source 3.46 supports the evidence given by Professor Keiji Nagahara in Source 3.45.
3 While the shugo could act on their own authority, they were carefully instructed by the shogun not to upset the local daimyo in following their duties, while also being clearly advised that they were to help administer and control all troops in the region. **Decide** whether this source supports or challenges this statement. **Explain** using a quote from the source to support your point.

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▲ **Source 3.47a** Wakamiya Oji (1.8-km street lined with cherry blossom trees) in Kamakura, leading to Tsurugaoka Hachimangu Shrine



▲ **Source 3.47b** Tsurugaoka Hachimangu Shinto shrine on 1 January 2018 in Kamakura, Japan. People queue to pray for the new year. The shrine is dedicated to Hachiman, the patron god of the Minamoto family (Genji) and of the samurai in general.

'Hanami' is the ancient Japanese traditional custom of enjoying the beauty and impermanence of flower blossoms. How might this represent a blend of Shinto and Buddhist philosophy?

How does the busyness of people participating in this ancient new year tradition here reflect historical continuity? What does it tell you about modern Japanese beliefs and attitudes towards Shinto and the samurai?

THE MUROMACHI PERIOD (1333–1573 CE): WHAT CAUSED THE SHIFT OF CONTROL BACK FROM THE SHOGUN TO THE EMPEROR?



THINKING DEEPER

Why might it have been difficult for the samurai class to govern peacefully?

Do you think military governments even today might experience the same difficulties in government?

As in the Classical period, there were key issues that led to another overthrow of the government. Principal among these were that the emperors, at times, attempted to re-take control from the shoguns through military conflict, mostly by promising power and rewards to the daimyo who would support them. The inherent issue with a samurai government was that the samurai class consistently tried to fulfil their basic function as warriors: to fight.

A period of intrigue and continuing conflict ended when Emperor Go-Daigo attempted to take back control of the state from the shogun in 1333. One of the generals, Ashikaga Takauji, who had previously served the Kamakura shogunate, joined with the emperor and assisted him in fighting against the troops of the shogun. While Takauji's hope

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appears to have been that he would be rewarded, Go-Daigo was more interested in establishing a court that returned Japan to the Classical Period, where he ruled directly and controlled the entire state.

As a result, he returned Japan to the tradition of using aristocrats to rule the country, appointing his own family members in place of the warrior government. This led to a period of further conflict that resulted in further change in the establishment of the Ashikaga shogunate in 1336. Having overthrown the Kamakura shogunate, the Ashikaga moved the capital back to Kyōto (the Muromachi district) and took control once again away from the emperor and his aristocrats. The key struggle in this time was to strengthen the government enough to control the different regions of Japan and make sure that the state did not divide again. Yet peace was short-lived!

How might the style and beauty of the temple encourage contemplative meditation and at the same time demonstrate the wealth and power of the family? Do you think there is evidence in this source that strengthens the *accuracy* and *reliability* of the painting in Source 3.43?

▼ **Source 3.48** The Ashikaga clan dedicated this Buddhist temple to Ashikaga Takauji, in honour of being the first member of their family to become shogun.



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In this section you have interrogated sources relating to historical change in the Classical and Feudal periods of Japan to identify cause and effect relationships using graphic organisers. In studying these relationships, you have learned how Japan moved from a country ruled by an emperor, to a shogun, to an emperor and back again to a shogun in the form of the Ashikaga. Furthermore, you have explored the difficulties relating to governments run by the military. Next you will investigate how continued power struggles after the Ashikaga Shogunate led to the unification of Japan under one predominant leader.



REFLECTING ON YOUR LEARNING 3.4



Reflect on what you have learned in this section by doing the following:

- **Generate** a list of ideas and initial thoughts that come to mind when you think about this section's inquiry question: What significant developments changed Japan throughout the Classical and Feudal periods?
- **Sort** your ideas according to how central or tangential they are. Place central ideas near the centre and more tangential ideas toward the outside of the page.
- **Connect** your ideas by drawing connecting lines between ideas that have something in common. **Explain** and write in a short sentence how the ideas are connected.
- **Elaborate** on any of the ideas/thoughts you have written so far by adding new ideas that expand, extend, or add to your initial ideas.

Continue generating, connecting, and elaborating new ideas until you feel you have a good representation of your understanding. Lastly, **explain** the best you can how your thinking here might contribute to answering your overall key inquiry question:

'How did Japan change so dramatically from a place of samurai warriors to one of the most modern and technologically advanced countries in the world today?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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3.5 Why did Japan become unified under one leader by 1600?

FOCUS QUESTIONS

- What caused war to break out again after the Muromachi Period and how long did it last?
- What happened after the warring period?
- How was peace and unification achieved in Japan during the Azuchi–Momoyama Period (1568–1600) after 100 years of war?
- How did Tokugawa Ieyasu change Japanese society?

What caused war to break out again after the Muromachi Period and how long did it last?

Historian Shelton Woods, in an online essay for *Japan Society* (2021), writes that 'as each decade passed [in the Muromachi Period under the Ashikaga shoguns], imperial and shogunate power and authority waned'. By 1464 two brothers of the Ashikaga clan became involved in a dispute for power. Both brothers had an unrelenting desire to be shogun. Different clans around Japan declared allegiance to one or other brother and Japan was on the brink of civil war. What followed was 10 years of heated and bloody fighting known as the Onin War (1467–1477), which severely weakened the authority of the Ashikaga shogunate.

In its weakened state, the Ashikaga shogunate was powerless to stop the daimyo forming further alliances and engaging in open warfare to gain power and influence. Just three years after the Onin War, Asakura Toshikage, the daimyo of Echizen (a province on the Japan Sea coastline), wrote the following list of principles for ruling a domain. It offers a view into the mindset of the daimyo at this time of instability.

- You should only appoint people to leadership roles based on their abilities.
- Spies or 'intelligence agents' should be used for all provinces under your control, 'even if the world may be at peace', so that you fully understand your entire region.
- Spend your money wisely on military weapons, so that you do not buy 'a sword or dagger worth 10 000 pieces' as 'it can be overcome by 100 spears each worth 100 pieces'.
- The best way to 'defend yourself in time of war' is to avoid buying expensive swords, but to buy '100 spears, and to arm 100 men with them'.
- Provide public entertainment (such as theatre), but make sure to hire local performers as well.
- Do not trust in luck in battles, but instead prepare thoroughly, be 'flexible in all situations' and ensure you have a good strategy.
- Send out trusted agents regularly on 'inspection tours of the province' to 'listen to the views of the common people and farmers', and to find out if there is any corruption or 'misgovernment'.
- Do not allow anyone else to build a castle in your territory.
- Be sure that in law and government you control your region 'judiciously and compassionately' so you do not need to worry about 'lawless bands of warriors from other domains'; if you are unjust, then other provinces 'may intervene in your affairs'.

▲ **Source 3.49** Summary of the 17 'House Rules' of Asakura Toshikage, 1480

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ACTIVITY 3.24
RESPONDING TO THE SOURCE

1 Categorise each of the rules from Source 3.49 into one of the following (category of best fit):

Military – relating to war, the preparation of war or security	Political – relating to government or legal matters	Social – relating to looking after the wellbeing of the people

2 **Explain** what your list tells you about the situation and priorities of the daimyo at this time.
3 **Describe** the relationships between the 'common people' and those in authority. Would you say that the daimyo trusts the 'common people' in his domain? **Use** examples from the list to support your response.
4 **Describe** what this particular daimyo (and perhaps others in 1480) views as the main methods of ensuring stability in society.
5 Discuss with your peers whether a daimyo is still relevant for the same purpose in the world today.

THE SENGOKU PERIOD (WARRING STATES)

As Source 3.49 suggests, this was a time of heightened tension, fear and suspicion, with a focus on military strength. As a result of the continued conflict and fear among daimyo and weak leadership by the Ashikaga shoguns, the economy was seriously weakened, famine occurred, and the country was thrown into turmoil for the first time in centuries. Needless to say, military success determined who lost and gained power in this period. Even though there was still an emperor and a shogun, warlords fought and schemed in this chaotic time. This period of Warring States, or *Sengoku*, would last for the next 100 years until a strong leader once again began the process towards peace and order in Japan.

What happened after the Warring States Period?

THE AZUCHI–MOMOYAMA PERIOD (1568–1600)

Your first steps into exploring what happened after the Warring States Period will be through independent historical inquiry. In the activity that follows, you will be asked to engage in the historical inquiry process to learn who the significant people were that contributed to the end to the warring period and how they went about achieving peace throughout Japan. Following your research in the activity below, you will rejoin this chapter's narrative and historical sources to investigate how the shogun Tokugawa Ieyasu went on to change Japan and sustain a period of peace for over two centuries.

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ACTIVITY 3.25
MAKING THINKING VISIBLE

'Question Starts' to develop a range of questions to inform historical inquiry

To be successful in this activity you will have:

- Developed research questions that will help you investigate and answer a key inquiry question
- Communicated your historical knowledge in the form of a historical explanation summary using reliable and useful information.

1 Source 3.50 is a summary statement relating to the key inquiry question: 'How was peace and unification achieved in Japan during the Azuchi-Momoyama Period (1568–1600) after the Sengoku (Warring States) Period?' Read the statement and particularly note the bolded words.

> Eventually, **three Great Unifiers** emerged at the end of the Warring States period beginning what came to be known as the **Azuchi-Momoyama Period** (1568–1600). These men established a single unified military government. The first of these unifiers, **Oda Nobunaga**, put a new Ashikaga shogun in office in 1568, but in 1573, dissatisfied, expelled him from Kyōto, bringing an end to the Ashikaga shogunate, and appointing no replacement. Fighting continued and Nobunaga was assassinated, but the war of unification was continued by his general **Toyotomi Hideyoshi**, the second unifier, and completed by the third, **Tokugawa Iyeasu**.

▲ **Source 3.50** Summary of unification of Japan after Sengoku Period

2 Next, reread the statement again and **consider** or brainstorm what questions pop into your mind throughout and after reading the statement. I.e. what do you want or need to know in order to better understand this development and answer the KIQ?

Note down research questions that will help you investigate and answer the key inquiry question: 'How was peace and unification achieved in Japan during the Azuchi-Momoyama Period (1568–1600) after the Sengoku (Warring States) Period?'

A good place to start with research questions is with the W&H stems:

- What…?
- Where…?
- When…?
- Who…?
- Why…?
- How…?

3 List your questions. Then, share and discuss your questions with a partner. Are they a mixture of 'open' and 'closed' questions? Do they relate to and help you answer the key inquiry question (in Question 2)?

4 **Decide** together which questions are best suited to guide your inquiry in response to the key inquiry question (see Question 2).

5 Check in with your teacher to seek feedback on your questions.

6 After responding to your teacher's feedback on your questions, work with your partner to conduct historical research online. You might want to start with the following key word searches:

- The three unifiers
- Oda Nobanaga
- Toyotomi Hideyoshi
- Tokugawa Ieyasu
- Azuchi-Momoyama Period.

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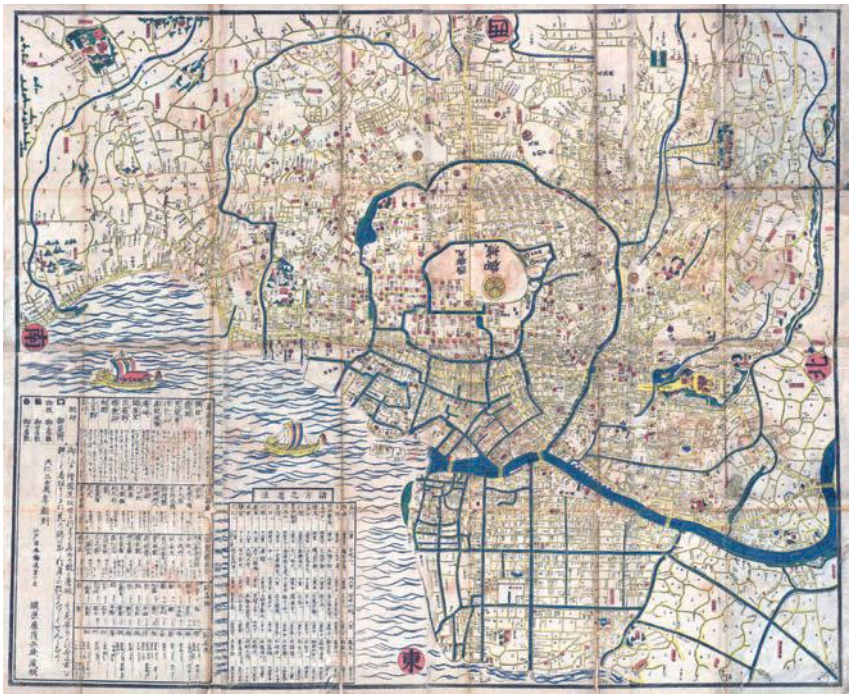
7 After you feel you have enough reliable and useful information to respond to your questions, complete a POWERWRITE:

- Take five minutes (no more or less) to independently write a historical explanation summary of what you have read, seen and thought about throughout your research. Your summary must answer briefly the key inquiry question.
- Note: you are writing *for* learning here. So be free and do not worry too much about grammar, punctuation and spelling. Just write! You are the audience for your writing here!

How did Tokugawa Ieyasu change Japanese society?

THE TOKUGAWA PERIOD (1600–1867 CE)

In your research you would have found out that in 1600, during the later stages of the period of civil war in Japan, Tokugawa Ieyasu won a decisive military victory at the Battle of Sekigahara. In 1603, Emperor Go-Yozei, ruler only in name, made Ieyasu the shogun. Japan was now united under Ieyasu's control. In a remarkable period of control, after extraordinary chaos and conflict, Tokugawa Ieyasu established the Tokugawa shogunate, and finally brought order and unification to Japan that would last for more than 200 years.



▲ **Source 3.51** A Japanese map of Edo (present-day Tokyo) in 1849. Note: west is at the top of the map in contrast to maps of today.

What do you notice about the design of the city? What geographical feature gives Edo a significant advantage in trade and commerce? Is it so difficult to believe that Edo pictured here became, as of 2016, the world's busiest and most populated city on Earth (Insider.com, 2021)?

Based in Edo (modern-day Tokyo), which was appointed the new military capital, the Tokugawa Bakufu reorganised all of society to ensure a strong administration and a strict division of society into four main classes. He worked hard to restore stability, peace and prosperity to Japan and briefly encouraged foreign trade with European powers. Japan advanced to the point where there were around one million people living in Edo by 1700.

Investigate the following primary source (see Source 3.52) to learn about Tokugawa Ieyasu's belief that society could function best through the adoption of strict roles.

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Once, Lord [Ieyasu] conversed with Honda, Governor Sado, on the subject of the emperor, the shogun, and the farmer:

> '… the true master of the way of the warrior is one who maintains his martial discipline even in time of peace. … the farmer's toil is proverbial … He selects the seed from last fall's crop, and undergoes various hardships and anxieties through the heat of the summer until the seed grows finally to a rice plant … The rice then becomes the sustenance for the multitudes … the artisan's occupation is to make and prepare wares and utensils for the use of others … the merchant facilitates the exchange of goods so that the people can cover themselves and keep their bodies warm.'

▲ **Source 3.52** Tokugawa Ieyasu's ideas on military government and social order



ACTIVITY 3.26
RESPONDING TO THE SOURCE

1 **Describe** how the shogun defines the 'four roles' of society (samurai, farmer, artisan, merchant) in Source 3.52.

2 You will notice that Tokugawa Ieyasu places the farmer's importance to society above that of the artisan and the merchant. **Explain** why he might do this. Do you think it reflects Confucius's ideas? If so, how? **Determine** whether this represents historical change or continuity in shogunate Japan.

3 **Explain** why you think Tokugawa Ieyasu believed that this created a stable society.

4 Does the fact that this document was written by an unidentified retainer of Tokugawa Ieyasu in the early seventeenth century make this source more or less reliable/trustworthy?



THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Change and continuity.

Your response should contain:

- A clear statement about what stayed the same and/or what changed
- Corroborating evidence or examples that show how things stayed the same (i.e. continuity)
- Differing evidence or examples that demonstrate how things changed
- A reason that accounts for this continuity.

You would have noticed in your study of Source 3.52 how Tokugawa Ieyasu distinctly made reference to the need for samurai to maintain 'his martial discipline even in time of peace'. But why is he supposed to do this? Well, the answer might well be in the following document. One of the most important Tokugawa legal documents, the Laws of Military Households (*Buke Shohatto*), was issued in 1615, only one year before Tokugawa Ieyasu's death, and provides us with an understanding of the basic regulations on the behaviour of lords and warriors according to Ieyasu. Let's see what it reveals.

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1 The study of literature and the practice of the military arts, including archery and horsemanship, must be cultivated diligently. 'On the left hand literature, on the right hand use of arms,' was the rule of the ancients. Both must be training together. Train yourself and be prepared for possible disturbances even in times of peace.

2 Avoid group drinking and wild parties …

6 You may repair castles, but must report it. New construction of castles is strictly forbidden. …

8 Marriage must not happen in private [without the permission of the Tokugawa government]. …

10 All people must wear clothing in accordance to their social status. Lords and samurai retainers must wear kimono with family crests on their sleeves. …

12 The samurai of all domains must practise frugality [not show wealth and not spend money openly]. When the rich proudly display their wealth, the poor are ashamed of not being on par with them. There is nothing which will corrupt public morality more than this, and therefore it must be severely restricted.

13 The daimyo of the domains must select men of administrative ability as their officials. The way of governing a country is to get the right men based on merit [not simply employ family or friends]. If your domain has good men if flourishes forever. If it has no good men, it is doomed to die.

▲ **Source 3.53** The Edicts of the Tokugawa Shoganate: excerpts from *Laws of Military Households* (*Buke Shohatto*), 1615



ACTIVITY 3.27
RESPONDING TO THE SOURCE

1. Based on your study of Japanese religious and philosophical traditions earlier in this chapter, **identify** what philosophical framework you think the laws in Source 3.53 are based on.
2. What does it seem the Tokugawa shogunate was seeking to accomplish through these rules and regulations? **Explain**.
3. **Explain** how easily you think the shogunate would have been able to enforce these laws.
4. **Describe** how you might have reacted to these laws as a samurai at the time.
5. **Determine** whether these rules reflect a change from feudal Japanese customs or a return to them.
6. To what extent are these rules similar to or different from what the Australian Government and Australian society might expect of its military leaders and soldiers? (In other words, which military attitudes and values have changed and which have stayed the same?)



THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Empathy.

Your response should contain:

- Language that shows that you understand the values, beliefs, experiences and emotions of people from the past
- Consideration of how these values, beliefs, experiences and emotions align with or differ from your own
- An explanation of how the origin and context of the source may account for similarities or differences with your own experience.

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▲ **Source 3.54** Toshogu Shrine was built in Nikko in 1617 as the mausoleum of Tokugawa Ieyasu.



THINKING DEEPER

How does this image in Source 3.54, taken almost 400 years later in 2009, reflect the significance of Tokugawa Ieyasu?

In this section you have developed research questions to guide your inquiry into how the Tokugawa government ultimately ended civil war in Japan by 1600 and provided a stable government over several centuries. However, its position steadily declined as financial problems of the government led to higher taxes and riots among the farmers. In addition, this was worsened by years of famine that, in turn, caused riots and further financial problems for the government and the regional daimyo. Furthermore, the Confucian-based social hierarchy began to break down as the merchant class grew increasingly powerful; some samurai even became financially indebted to them. But it was foreign pressure from beyond the shores of Japan that would ultimately bring an end to the centuries of Tokugawa rule.

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REFLECTING ON YOUR LEARNING 3.5



Reflect on what you have learned in this section by doing the following:

- **Generate** a list of ideas and initial thoughts that come to mind when you think about this section's inquiry question: 'Why did Japan become unified under one leader by 1600?'
- Sort your ideas according to how central or tangential they are. Place central ideas near the centre and more tangential ideas toward the outside of the page.
- Connect your ideas by drawing connecting lines between ideas that have something in common. **Explain** and write in a short sentence how the ideas are connected.
- Elaborate on any of the ideas/thoughts you have written so far by adding new ideas that expand, extend, or add to your initial ideas.

Continue generating, connecting and elaborating new ideas until you feel you have a good representation of your understanding. Lastly, **explain** the best you can how your thinking here might contribute to answering your overall key inquiry question:

'How did Japan change so dramatically from a place of samurai warriors to one of the most modern and technologically advanced countries in the world today?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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3

3.6 Interpretations about Japanese society and events: how did contact with the outside world irreversibly change Japan?

FOCUS QUESTIONS

- Why was Japan 'closed' to the outside world?
- What was Sakoku, what motivated it and what were its effects?
- How did Sakoku end?
- What changed after Japan ended Sakoku and opened up to the world?

Why was Japan 'closed' to the outside world and opposed to foreign influences?

While the Tokugawa government was a stable one, it faced various challenges. In order to maintain stability, it was decided that it was not only necessary to ensure peace within the country through dominating the noble families and the samurai class, but to also stop outside interference that might disrupt the hard-won peace in Japan.

What was Sakoku, what motivated it and what were its effects?

edict official order or proclamation issued by a person in authority

Take a look now at an extract from the Sakoku **Edict** of 1635 to see what it reveals about the Tokugawa's attitudes towards foreigners.

1 Japanese ships are strictly forbidden to leave for foreign countries.
2 No Japanese is permitted to go abroad. If there is anyone who attempts to do so secretly, he must be executed. The ship so involved must be impounded and its owner arrested, and the matter must be reported to the higher authority.
3 If any Japanese returns from overseas after residing there, he must be put to death. …
7 If there are any Southern Barbarians (Westerners) who propagate the teachings of Padres [priests, who taught Christianity], or otherwise commit crimes, they may be incarcerated in the prison.

▲ **Source 3.55** Extract from the Closed Country Edicts of 1635

ACTIVITY 3.28
RESPONDING TO THE SOURCE

1 Based solely on the title and reference in Source 3.55, **describe** what you think the term 'Sakoku' might mean.
2 Compose a list of evidence from the source that reflects this meaning.
3 According to these edicts, **describe** what would happen to Japanese people if they were to leave their own country.

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4 **Describe** how these laws might be received in Australia today. **Explain** why.
5 **Describe** the use of the term 'barbarian'. Is it a positive or negative term? **Explain** what this might tell us about the way Japanese people felt about foreigners.
6 The fear of foreigners and foreign influence is called 'xenophobia'. **Determine** whether there is sufficient evidence in this source to define this edict as xenophobic (to have a xenophobic perspective). **Explain**.
7 **Determine** whether a country could survive economically in the world today with a policy like this. **Explain** what this tells tell you about the global economy then and now.

As the Sakoku Edicts (see Source 3.55) suggest, the Tokugawa government believed that the greatest disruption would come from foreigners, particularly Europeans. This had already occurred. The first landing by namban or 'barbarians from the South' were Portuguese sailors who arrived in Japan in 1543, and, soon after, Christian missionaries began to create outposts there to **evangelise** the Japanese. By the early seventeenth century, Christianity was outlawed and the Portuguese were forced out of Japan as a 'polluting influence'.

evangelise convert or seek to convert (someone) to Christianity

isolationism policy of remaining apart from the affairs or interests of other countries

Despite the negatively perceived influence of Christianity, the Japanese welcomed European guns and soon introduced them into Japanese warfare. However, as a result of growing concerns about the impact of outsiders on Japanese culture and Japanese society, the Tokugawa shogunate closed the country by the middle of the seventeenth century. There were a limited number of ports where trade with other countries was allowed, but otherwise Japan was meant to be a closed and **isolationist** system (Sakoku), and to build up its culture and economy without outside interference. And as Item 7 of the Sakoku Edicts (see Source 3.55) clearly states, Christianity was banned.



▲ **Source 3.56** A Japanese writing box decorated with images of foreigners, c.1600. The two men on the left were likely Portuguese traders, identifiable by their balloon-shaped pants. The man on the right is a Jesuit priest.

Would you say the Japanese have depicted these men positively or negatively? For many Japanese people at the time, objects decorated with images of foreigners offered the rare opportunity to see Westerners. Based on your answer to the previous question, how do you think they might react to objects like this?

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ACTIVITY 3.29

Attitudinal scale in a moral dilemma

1 In your class, **create** an attitudinal scale across the room from one end of the classroom to the other. At each end will be the absolute opposing viewpoints:

The idea of fear of foreigners and foreign influence, or 'xenophobia', is a thing of the past. The world has changed and is now inclusive of all cultures and foreign ways.		The idea of fear of foreigners and foreign influence, or 'xenophobia', exists still in the world today and is even worse than ever. Australia is no exception.

2 Each student will place themselves along the scale continuum. Various students will be asked to **justify** why they are standing where they are.

3 You will then have the opportunity to move after hearing the viewpoint of others in your class. You will again be asked to **justify** your viewpoint.

How did Sakoku end?

The policy of Sakoku only lasted until the United States of America forced Japan to reopen to international trade. In 1853, Commodore Matthew Perry arrived in Japan with four American warships, two of which were steamships. In this next activity you will interrogate two historical sources relating to this event to practise the skill of 'perspective' in your historical inquiry.

ACTIVITY 3.30

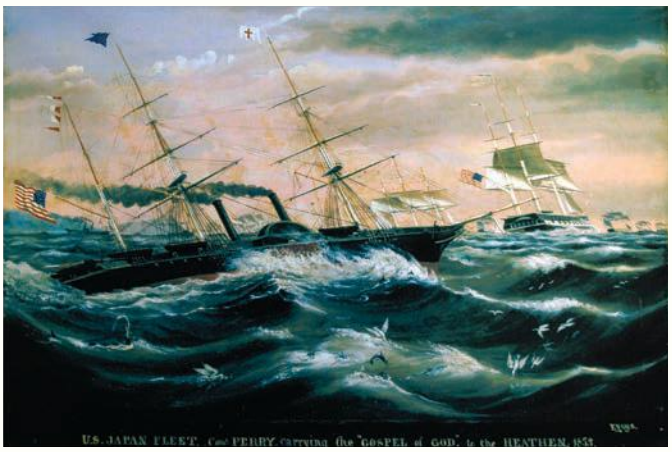
Developing historical skills: historical perspectives and interpretations

To be successful in this activity you will have analysed two historical sources to identify perspectives and the attitudes within them.

Look at the two visual interpretations of Commodore Matthew Perry's fleet that arrived in Japan in 1853. Follow the steps below to **analyse**, **interpret** and **identify** the embedded hidden within the sources.

1 **Describe** how Source 3.57 depicts Perry's mission.

- List descriptive words that reflect the way in which it is represented. For example, 'powerful'.
- Refer to elements of the source that connect to each word you have listed. For example, 'powerful ships cutting through the sea'.



▲ **Source 3.57** *Perry carrying the Gospel of God to the Heathen*, 1853

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2 **Describe** how Source 3.58 depicts Perry's mission.
   - List descriptive words that reflect the way in which it is represented.
   - Refer to elements of the source that connect to each word you have listed.

3 **Identify** the key differences between these images.

4 **Identify** the attitudes the titles of the sources reveal. Finish the following sentence stems:
   - The title of Source 3.57 shows the US's attitude towards the Japanese is …
   - The title of Source 3.58 shows the Japanese attitude towards the US is …

5 Write two perspective statements on the arrival of the Black Ships in Tokyo Bay in 1853:
   - One from the point of view of the US that refers to evidence from Source 3.57
   - One from the point of view of the Japanese that refers to evidence from Source 3.58.



▲ **Source 3.58** Japanese wood-block print *Perry's Black Ships*

When the fleet of ships arrived in Tokyo Bay, Commodore Perry carried with him a letter written by the US president, Millard Fillmore, addressed to the Japanese emperor. You might be interested to know that the letter was not read by the emperor, but by the shogun. The letter carried a strong message. Take a look at extracts from the following letter to see what it reveals about Japanese–US relations at the time.



▲ **Source 3.59** Japanese depiction of Commodore Perry featured on a scroll

Would you describe this depiction of Perry as positive or flattering for someone who holds the senior position of Commodore in the US Navy? Does this support the Japanese attitude towards Perry and the Black Ships you identified in Activity 3.32?

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[The United States of America have] large cities, from which, with the aid of steam vessels, we can reach Japan in eighteen or twenty days … our commerce with all this region of the globe is rapidly increasing, and the Japan seas will soon be covered with our vessels.

Therefore, as the United States and Japan are becoming every day nearer and nearer to each other, the President desires to live in peace and friendship with your imperial majesty, but no friendship can long exist, unless Japan ceases to act towards Americans as if they were her enemies.

However wise this policy may originally have been [to close the country], it is unwise and impracticable now that the interaction between the two countries is so much more easy and rapid than it formerly was. [We] hold out all these arguments in the hope that the Japanese government will see the necessity of averting unfriendly collision between the two nations, by responding favourably … Many of the large ships-of-war destined to visit Japan have not yet arrived in these seas, though they are hourly expected; [Perry], as evidence of his friendly intentions, has brought but four of the smaller [warships], designing, should it become necessary, to return to Edo in the ensuing spring with a much larger force.

▲ **Source 3.60** Letter from US President Millard Fillmore, 14 July 1853

ACTIVITY 3.31
RESPONDING TO THE SOURCE

1 **Identify** the tactic you think President Fillmore (in Source 3.60) was using by having Commodore Perry deliver this letter with warships.
2 **Determine** whether President Fillmore's actions can be defined as peaceful **diplomacy** or a forceful attempt to force Japan to open its borders. Refer to phrases from the letter to support your view.
3 **Describe** how would expect the shogun to have felt about this letter.
4 From what you know so far about Japan at this time in history and based on the US's description of its power in the letter, **determine** whether the shogun was in any position technologically and militaristically to challenge the US ships. **Explain**.
5 **Explain** why many historians might define this event as a significant turning point in Japanese history specifically and world history more broadly. (Note: if you are having trouble with this question, read on and you should find hints in the upcoming narrative text. Then return to this question, considering your newfound information from what you have read and your thoughts about Japan today as a result.)

diplomacy practice of negotiating between representatives of different countries

What changed after Japan ended Sakoku and opened up to the world?

You will be interested to know that Perry's successful American trade mission was quickly followed by other world powers, Russia, Britain and France, which all forced Japan to sign 'unequal' treaties that allowed them trade and access to Japanese resources by 1858.

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The Japanese government had reluctantly opened its borders, which eventually meant that Japan not only opened its state to trade, but to a period of **modernisation** and **industrialisation** ending forever the feudal period of Japan under the shoguns. Since the Portuguese traders first arrived in 1543, it had been clear that Japan would be subject to a new kind of intercultural exchange that would fundamentally alter its society.

modernisation process of adapting something to modern needs or habits

industrialisation development of industries in a country or region on a wide scale

As you probably have realised from your study in this section, the military technology that Commodore Perry demonstrated to the Japanese in 1853 showed that the US and the European powers were much more advanced than isolationist Japan at that time of Sakoku. You explored the idea of xenophobia and developed your understanding of how perspectives can influence historical interpretations. And finally, you explored the concept of power in international politics: how militarily and technologically stronger countries often force weaker ones to do what they don't want to do.

REFLECTING ON YOUR LEARNING 3.6

Reflect on what you have learned in this section by doing the following:

- **Generate** a list of ideas and initial thoughts that come to mind when you think about this section's inquiry question: 'How did contact with the outside world irreversibly change Japan?'
- Sort your ideas according to how central or tangential they are. Place central ideas near the centre and more tangential ideas toward the outside of the page.
- Connect your ideas by drawing connecting lines between ideas that have something in common. **Explain** and write in a short sentence how the ideas are connected.
- Elaborate on any of the ideas/thoughts you have written so far by adding new ideas that expand, extend, or add to your initial ideas.

Continue generating, connecting and elaborating new ideas until you feel you have a good representation of your understanding. Lastly, **explain** the best you can how your thinking here might contribute to answering your overall key inquiry question:

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Conclusion: end-of-chapter reflection

Why does it matter today?

Japan is a land that is rich in tradition and cultural resources, remarkably advanced in technology, and currently one of Australia's significant allies and trading partners in Asia. Given this, it is important to understand more about Japan, including its history and its culture, as one of our nearest and closest neighbours. Modern-day Japan is extremely influential economically and culturally, producing goods that play a role in Australian life today, ranging from cars and electronics, to chemicals, to martial arts and popular culture like *anime* and *manga*.



▲ **Source 3.61** Japanese *manga* and *anime* are very popular in Australia. Pictured are fans at a promotional stand in Tokyo advertising a live-action version of manga *One Piece* in 2023.

As you have learned, this has not always been the case, and for a very long time Japan was isolationist and xenophobic. That is, the Japanese shogunate government was worried about opening up the country to outside influences, particularly from Europe. This meant that from 1633 until 1853, Japan was officially a closed country (Sakoku) and only allowed trade through a limited number of seaports. However, after this period, Japan rapidly advanced and westernised politically, militaristically and technologically. It expanded and built an empire through military conquest in World War II (1939–1945). After Japan's defeat in World War II, the US government occupied Japan. Since then, Japan has adopted a Western democratic political system similar to Australia, and it has become a global economic power in commerce and trade. Yet Japan's history continues to influence its future, including traditional perspectives on work and life, with samurai values instilled deeply in modern business practices – the sword and battlefield, it seems, has simply been swapped for the computer and boardroom. Therefore, in order to understand our contemporary neighbour, like many ancient civilisations, we have to look into and understand Japan's past.

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Reflection

STEP ONE: REFLECT ON YOUR SUB-QUESTIONS

At the end of each section of this chapter, you were asked to reflect on how the information in the section related to the overall inquiry question:

'How did Japan change so dramatically from a place of samurai warriors to one of the most modern and technologically advanced countries in the world today?'

For each of the sub-questions below, write a brief response (approximately two to three sentences) to the sub-question. Do you feel that you have a good understanding of each section of this chapter?

- What role did geography play in the development of Japan's civilisation?
- How was Japanese society ordered under the shoguns?
- What were the significant influences on early Japanese society?
- What significant developments changed Japan throughout the Classical and Feudal periods?
- Why did Japan become unified under one leader by 1600?
- How did contact with the outside world irreversibly change Japan?

(If you prefer a visual approach, you could do this as a mind map instead.)

STEP TWO: REFLECT ON THE KEY INQUIRY QUESTION

Now, based on what you have learned in this chapter, write a short paragraph in response to the question: 'How did Japan change so dramatically from a place of samurai warriors to one of the most modern and technologically advanced countries in the world today?'

STEP THREE: FUTURE QUESTIONS

Based on your learning in this chapter, what questions do you have about Japanese history?

Reflect on the questions you or your classmates raised at the beginning of the chapter at the end of the 'Setting the scene' activities. Have you answered most of these questions? Which questions have not been answered?

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End-of-chapter assessment

1 Developing historical skills: Using historical sources to analyse and compare historical perspectives and interpretations and determine historical accuracy in film

To be successful in this assessment task you will have:

- Conducted historical research (located, selected, analysed and used information from a range of historical sources as evidence) to develop a historical argument in response to the key inquiry question: 'To what extent is the film *The Last Samurai* an accurate representation of samurai life and the Satsuma Rebellion?'
- Communicated your historical argument as an evidence-based magazine article or podcast that assesses the accuracy of the 2003 film *The Last Samurai*.

Context



▲ **Source 3.62** An 1877 colour woodblock print by Japanese artist Tsukioka Yoshitoshi (1839–1892) titled *Surrender of the Satsuma Rebels at Kagoshima*. The print depicts the newly established Meiji government army's victory over rebelling samurai who were fighting to regain their right to carry swords. Like many Japanese at the time, the artist Yoshitoshi was interested in new things from the rest of the world, but over time he became increasingly concerned with the loss of many aspects of traditional Japanese culture, among them traditional woodblock printing.

How might this illustration reflect another significant turning point in Japanese history?

In 1868, just 15 years after Perry's black ships opened Japan's borders, there was a transfer of power from the shogunate back to the emperor (a restoration) known as the Meiji Restoration. In theory, the emperor ruled Japan but in practice this was not the case. In the new modern Japan, with a new Western democratic government, the emperor was just a figurehead. Emperor Meiji and over 760 daimyo signed a document called the Charter Oath, a five-point statement introducing Japan's new democratic government. But not all samurai were happy about this change.

Many samurai saw this change as a threat to their existence. Some samurai reacted with force. There were four major rebellions by samurai between 1873 and 1877. The final and most serious

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rebellions put down by the newly formed government army was the Satsuma Rebellion of 1877 led by Saigō Takamori. We now return to where we began this chapter – with the events of the Satsuma Rebellion and the death of this significant samurai. (Perhaps jump back to the first-page narrative in the chapter and refresh your memory of this story.)

Task

When people watch Hollywood blockbuster movies that depict historical events, they often get carried away and assume the movies are accurate!

1 As a student historian commissioned by the Japanese Government you are to inform Australian students studying Japanese language and culture (like those perhaps at your school) about whether the Hollywood blockbuster *The Last Samurai* (2003) is an accurate historical representation of the Satsuma Rebellion (the historical event that led to the end of this period under the shoguns on which the film is based) and feudal Japan's samurai way of life more broadly. Use the table below to guide you in the first part of this task.

Note: Check with your teacher or guardian/s before watching this film.

Investigating accuracy of the film *The Last Samurai*: Fact or Fiction?	
Director:	Edward Zwick
Year of production:	2003
Title of movie:	*The Last Samurai*
Type of recording:	DVD
Company, place of production:	Warner Bros.

Inquiry question: **To what extent is the film *The Last Samurai* an accurate representation of samurai life and the Satsuma Rebellion?**		
COLUMN 1 – Descriptions from the film (While viewing)	**COLUMN 2 – Preparing to fact check (After viewing)**	**COLUMN 3 – Researching and fact checking/evaluating (After viewing)**
Describe key information from the film about the below categories	• Questions I have • Things I want to know/need to find out about whether information in Column 1 is accurate • How I might find out/ sources to consult	Fact checking (evaluating): • Evidence I have found in my research to respond to my thinking in Column 2 • supports/contests accuracy of film
Significance of individuals American Captain Algren: Emperor Meiji: Katsumoto (Daimyo): Taka (samurai lord's sister): Ujio (Daimyo's top retainer samurai):		
Significance of groups Samurai men: Samurai women: Samurai children: Imperial Army:		
Beliefs and values Bushido: Seppuku: Warfare:		

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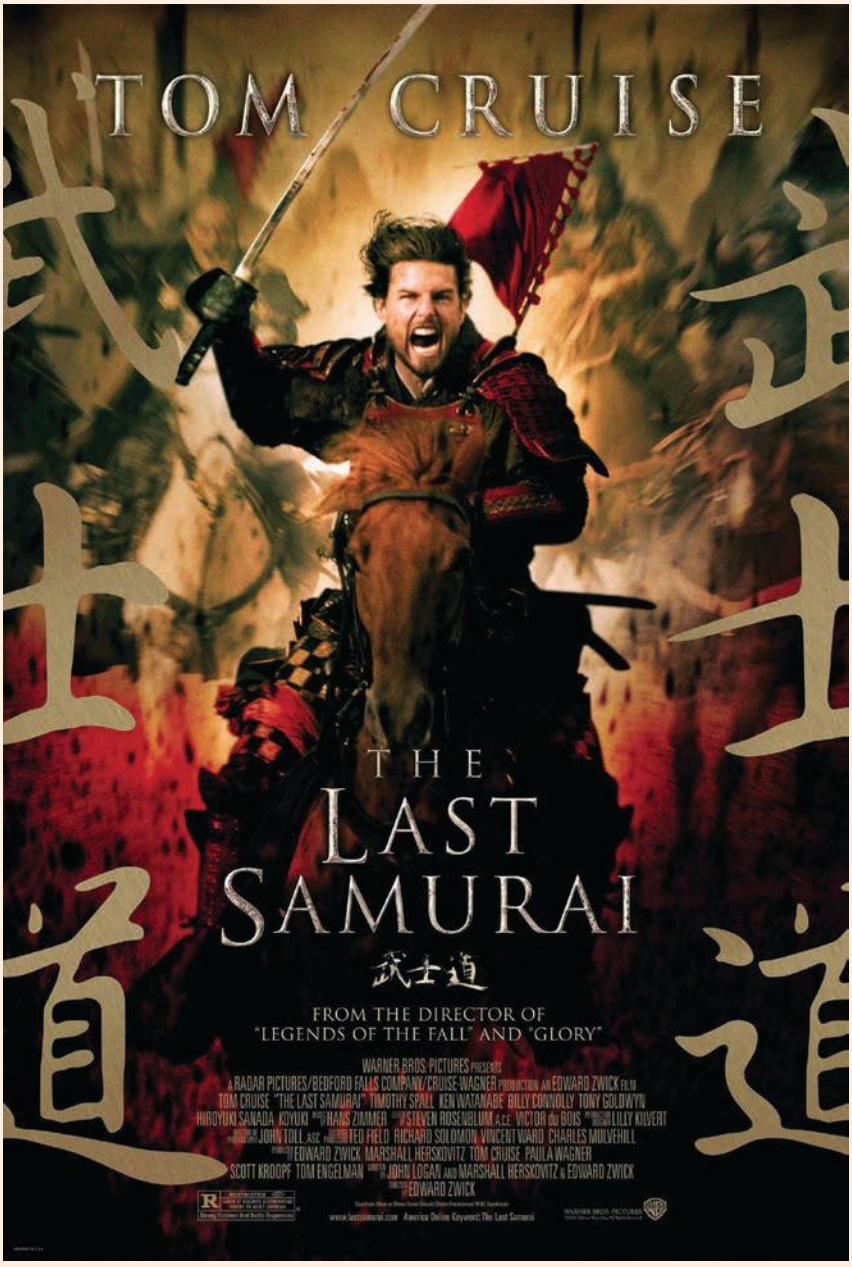
2 Now that you have completed your analysis and evaluative research about the accuracy of the film, publish your thinking as a film review in the form of one of the following: a magazine film review (minimum 400 words – not including evidence from sources), a radio film review segment (podcast) or a TV film review segment (video).

Digital resources

Visit the Interactive Textbook or Online Teaching Suite to access:

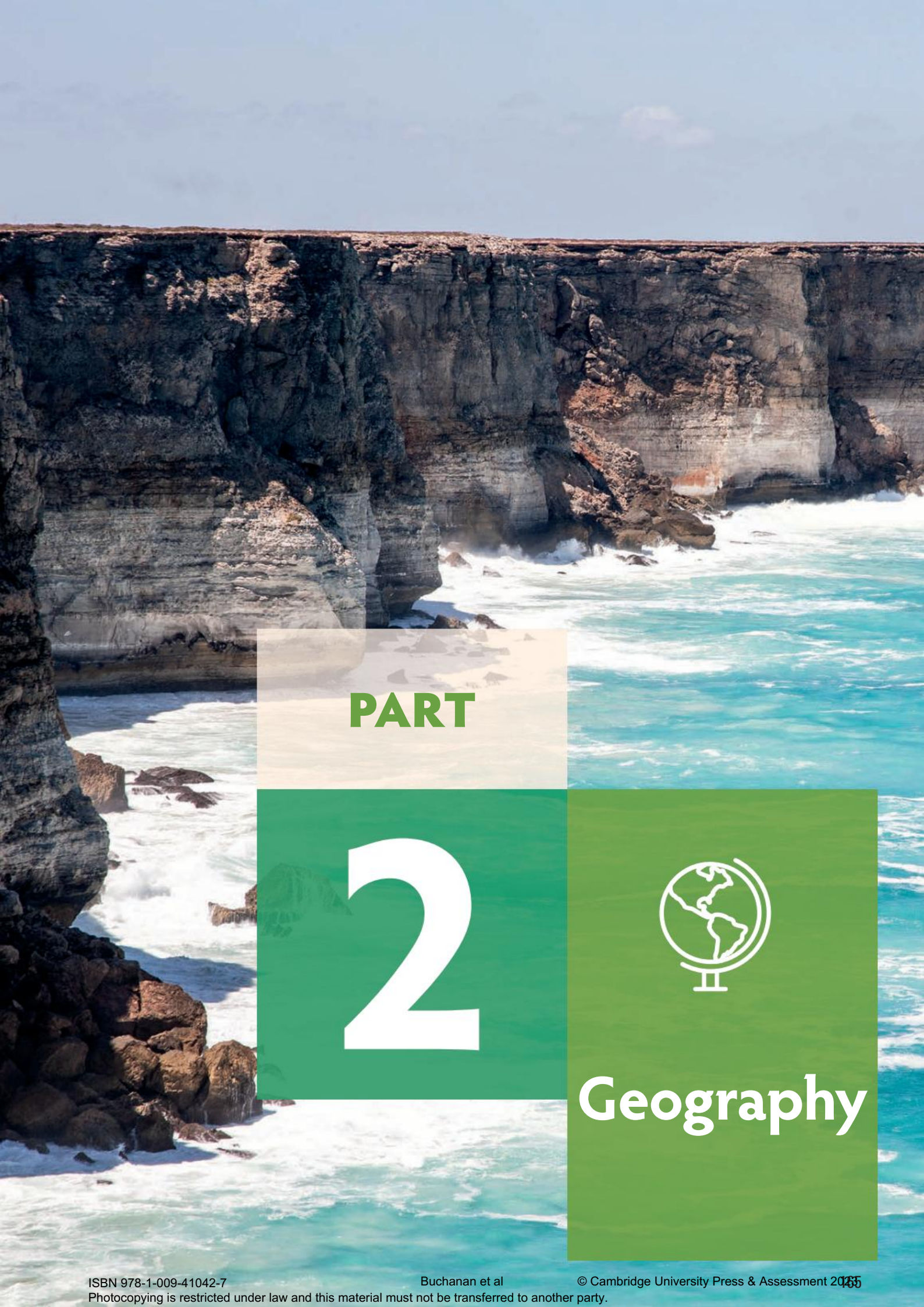
- General Capability Project
- Interactive chapter Quiz
- Interactive Scorcher Quiz
- Videos, image galleries and other extra materials.

SCORCHER



▲ **Source 3.63** Movie poster for *The Last Samurai* (2003) starring Tom Cruise

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PART 2

Geography

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What is Geography?

Geography combines the study of the physical features of the Earth and the relationships people have with both natural and human environments. Geographers might study the different landforms that make up a landscape and try to understand the processes that formed them. As humans continue to inhabit more and more of the Earth's surface, geographers are interested in the ways that people impact landscapes and the ways these environments can be managed. Asking questions about the world is an essential part of any geographical study. Population growth and the continuous development and expansion of urban areas pose a number of challenges for geographers, who seek to manage them in ways that are economically, socially and environmentally sustainable.

Introducing geographical concepts and skills: *geographical thinking* and *using data and information*

Throughout the geography section of this book, you will learn to interpret and analyse a range of data including maps, graphs, statistics and **satellite imagery**.

Visit the Interactive Textbook to revise skills videos from the Year 7 book.

Geographers collect, analyse and present data in order to answer questions and draw conclusions. This data often has a spatial component in the form of a map, a **geotagged photo** or a digital interactive map known as a **geographic information system**. Geographical data is used to compare different environments, determine why environments change, assess the impacts of these changes and evaluate how changes are managed.

satellite imagery images taken by satellites orbiting the Earth

geotagged photo a photo that contains information about where it was taken, such as latitude, longitude and elevation

geographic information system a digital tool used to collect and analyse spatial data using layers on an interactive map

primary data information collected in the field by the person undertaking research

geographic characteristics physical and human features of a landscape or environment such as landforms, terrain, vegetation, climate, architecture and infrastructure

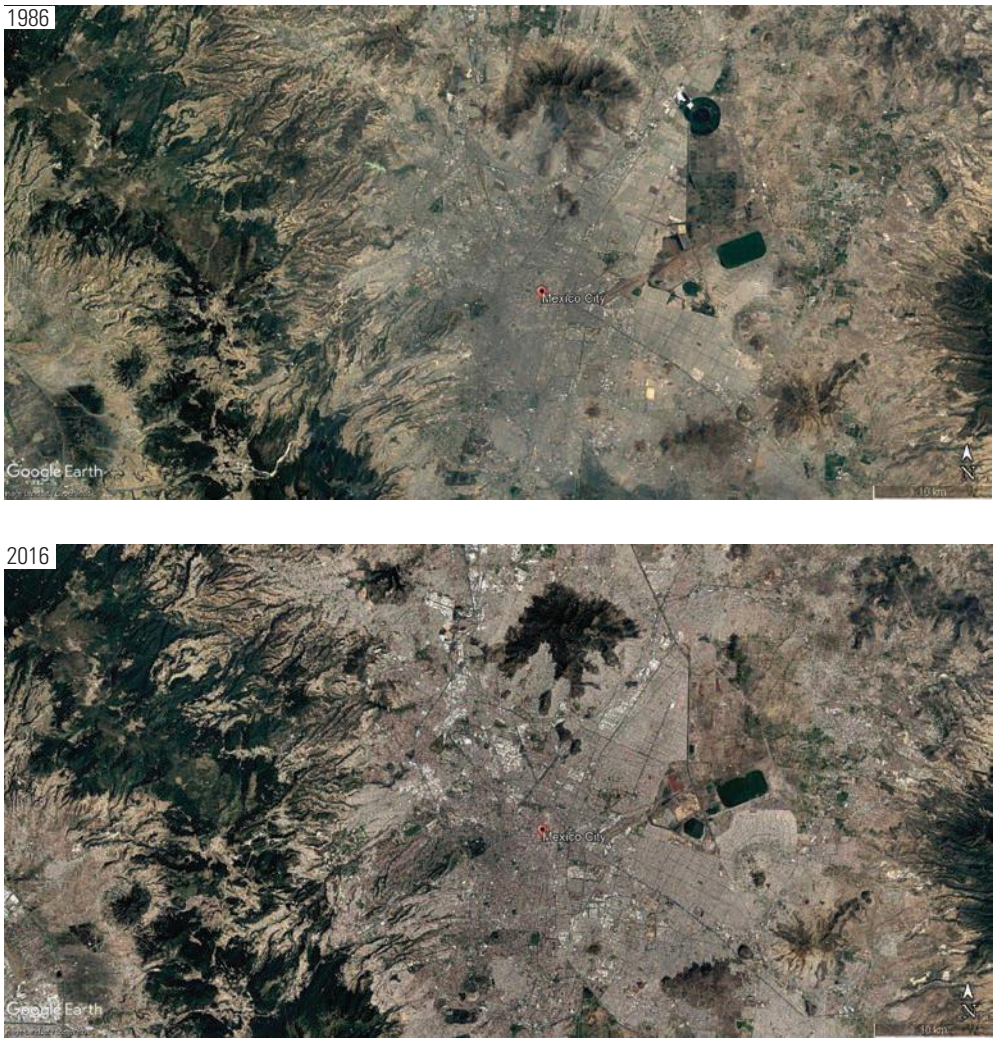
secondary data information collected from research such as studies, statistics and satellite imagery

Geographers collect their own **primary data** on a local scale by undertaking fieldwork. Techniques used to gather this data include drawing field sketches, taking photographs, surveying local residents and mapping **geographic characteristics**.

Secondary data is also used, which includes field data collected by others, historical accounts, data gathered remotely by satellites and data collected on a larger scale, such as in a national census.

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▲ **Figure 4A** Satellite images showing the expansion of Mexico City (Mexico) from 1986 (top) to 2016 (bottom)

Geographic concepts are used to help direct a geographer's thinking. The seven concepts used in the following chapters are place, space, environment, interconnection, sustainability, scale and change. The images of Mexico City in Figure 4A are an example of how satellite imagery can be used to investigate urban expansion, such as the growth of a city. A geographer might investigate how the characteristics of this place have changed and use a scale to quantify the growth. They might also look at the interconnection between the local climate and surrounding mountainous landscape and the space in which development has occurred. An essential consideration with this type of urban growth is the potential effect on the local environment and whether the development is economically, socially and environmentally sustainable. These concepts will be expanded upon throughout the following chapters as you study a range of landforms and landscapes, the processes that form them, urbanisation and the impact it has on cities around the world, and the reasons for migration and its effects.

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UNIT

1

Landforms and landscapes

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Overview

At an elevation of 8849 metres, Mt Everest is the highest mountain on Earth and one of its most iconic landforms. It is one of the many peaks that make up the Himalayas, a mountain range that began forming 50 million years ago due to the collision of the Indian tectonic plate and the Eurasian tectonic plate. Each year, an average of 1000 people attempt to climb Mt Everest with approximately half reaching the summit. Sadly, more than 300 people have died on the mountain, including eight people in 2021–2022. Hazards in the region include avalanches, crevasses, the collapse of ice blocks as large as houses and an inhospitable climate. Those who survive the death zone (dangerous altitudes above 8000 metres) may gain an unobstructed view of one of the Earth's most breathtaking landscapes.



▲ **Figure 4B** A view of Mt Everest

This unit explores a range of different landscapes across the world and how humans interact with these landscapes. You will examine the landforms that define these landscapes and how these environments change. This includes natural changes due to **geomorphological** processes and changes due to humans such as urban development, recreation and the harvesting of natural resources. People and cultures around the world also draw spiritual, aesthetic and cultural meaning from landscapes. As you learn about these landscapes, you will also learn how people and cultures around the world draw meaning

geomorphological physical and chemical interactions between Earth's surface and environmental processes which produce or shape landforms

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from them and the importance that First Nations peoples place on landscapes. By investigating the interconnection between natural processes and human activities, you will gain an understanding of the ways in which people manage the risks and benefits of living in and sustainably managing diverse global landscapes.

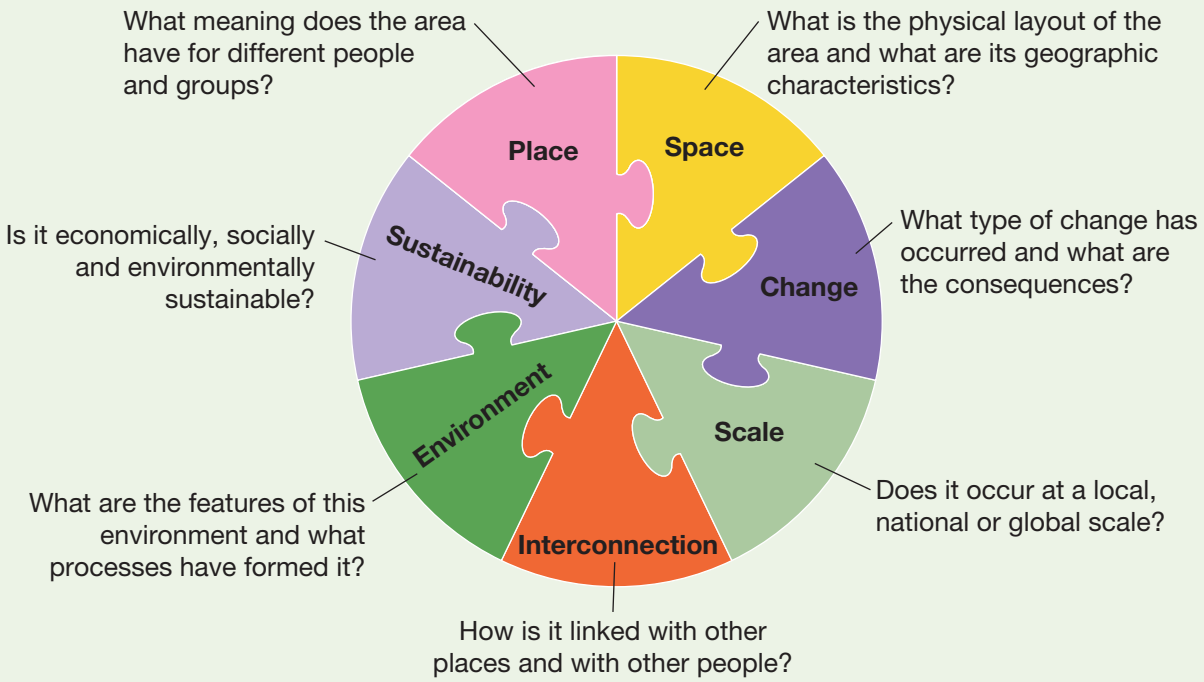
Introducing geographical concepts and skills: *environment* and *change*

Throughout this unit there will be a focus on understanding concepts of the environment and change. In Geography, the concept of environment includes the differing characteristics of environments, the processes that form environments and the processes that change them, ways in which environments support life, and the interrelationships between people and environments.

A key part to studying landforms and landscapes is observing how they change over time. This can be studied over various temporal and spatial scales. A geographer might study different layers of soil or bedrock to reveal clues about the formation of a landform or changes to the climate over thousands or even millions of years. Geographers are also interested in the role of human activities in changing and affecting environments. This might be on a relatively small scale, such as coastal erosion due to urban development, or on a large scale such as the melting of Greenland's ice sheet. Environmental management aims to reduce the negative impacts that people have on environments, restore environments that have been degraded in the past and manage the risks that geomorphological processes might have on human environments.

Although this unit has a specific focus on environment and change, these concepts are part of a group of seven interrelated key ideas that help us to think geographically. It is important for you to remember that we approaching the topic of landscapes and landforms through the lens of the discipline of geography. Students should remember, especially when learning about the Australian landscapes presented in this chapter, that First Nations peoples have ways to know these places. As you study the places mentioned in this chapter, look for ways where you can identify how First Nations peoples understand these places in addition to the more 'traditional' ways that geographers have talked about landscapes and landforms.

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▲ **Figure 4C** Adapted from ACARA, 'Understand this learning area: Geography 7–10', Australian Curriculum: Geography V9.0



▲ **Figure 4D** An example of coastal erosion on the Gold Coast after wild weather in 2009.

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CHAPTER 4: Landscapes and landforms

Setting the scene: looking into the heart of the world

After hours of trekking through thick jungle and up the steep slopes of the volcano, visitors to Mt Nyiragongo in the Democratic Republic of Congo are treated to a rare sight. The night is lit by the glow of lava, molten rock that has risen from the depths of the Earth and pooled in the bottom of the volcano's wide crater. One of only eight 'lava lakes' discovered so far in the world, Mt Nyiragongo's is the oldest and currently the largest. Not only a spectacular sight, the lake provides a unique opportunity to observe what goes on beneath the Earth's crust.

A steep-sided, cone-shaped mountain, known as a stratovolcano, Mt Nyiragongo is created by the divergence of the Somali tectonic plate from the African tectonic plate, a huge section of the Earth's crust that is slowly pulling itself apart. The massive valley created by this movement is known as the Eastern African Rift, and weaknesses in the Earth's surface along the rift result in its many volcanoes, such as Mt Nyiragongo. The volcano and its lava lake are not only a magnificent natural wonder but are also a highly active and dangerous force. In 1977 an eruption split the side of the mountain, spilling somewhere between 5 and 20 million cubic metres of lava from the lake across the surrounding countryside.

Travelling at speeds up to 60 kilometres per hour, the lava killed around 70 people. A similar event in 2002 destroyed around 15 per cent of the nearby city of Goma, leaving hundreds of thousands of people homeless.

The story of Mt Nyiragongo describes a landscape featuring volcanic landforms, which were created by the movement of tectonic plates and the force of volcanic eruptions. In it, we see the themes of this chapter reflected: how geographers describe landscapes and landforms and explain the processes that create them, how geomorphological processes are used by and impact humans, and the significance of these landscapes and landforms for different peoples.

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▲ **Figure 4E** The 'heart of the world': Mt Nyiragongo's lava lake

ACTIVITY 4.1
MAKING THINKING VISIBLE

Think, pair, share

Reflect on the story of Mt Nyiragongo.

1 Think about the story of Mt Nyiragongo and **explain** your thinking with pictures or words in your notebook or on your digital device.
   - **a** **Explain** how you would feel about seeing lava that has come from deep within the Earth.
   - **b** **Describe** in what ways the story conveys the force and danger of volcanic eruptions.
   - **c** **Explain** what the story can tell you about the processes that create volcanic landscapes.
   - **d** **Explain** what you think entices travellers to make the difficult trek through jungle and up the mountainside to visit Mt Nyiragongo's crater.

2 Pair with a peer and share your thoughts.

3 **Explain** why you think people continue to live near such a dangerous volcano. (*Hint*: if you can't answer this question now, come back to it after working through the rest of this chapter).

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Chapter overview

Introduction

When conducting a geographic inquiry, it is helpful to have an overarching, or driving, question that shapes the direction of your study. While you will be learning about the geomorphological processes that shape and form key landscapes and landforms across our planet, this scientific knowledge forms the background to your inquiry in this unit. The focus of this unit is to help you to understand how the interactions of people and environmental processes impact on the characteristics of places. You will be undertaking a study that investigates how places (landscapes and landforms) are perceived and valued differently by people. It is critical that you understand that while knowledge of geomorphological processes are important, it is the ways that we as humans respond to the geographical phenomenon or challenge that is just as significant. Humans manage these phenomena and challenges through environmental, economic or social factors.

This chapter studies the world's landscapes and the different landforms found in them. It examines how geographers classify the terms 'landscape' and 'landform' and discusses the processes that create different landforms. You will analyse the impact of human activities on landscapes and discuss the importance of landscapes for different peoples.

Learning goals

After completing this chapter, you should be able to answer these questions:

'How do the interactions of people and geomorphological processes shape and inform how humans perceive and manage the characteristics of places?'

We will explore this question through five interrelated sub-inquiry questions:

1. What are the geomorphological processes and forces acting on the Earth's surface that produce different landscapes and significant landforms?
2. Where are Australia's distinctive landscapes and significant landforms found?
3. Why do people, including First Nations peoples, attribute various meanings and values to diverse landscapes and landforms?
4. In what ways do human activities manage and interact with the processes and forces that shape distinctive landscapes?
5. How might the causes and impacts of a geomorphological hazard affect how people manage and respond to such events?

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Learning goals

After completing this chapter you should be able to answer these questions:

- How do landscapes differ based on their geographic characteristics?
- What are some of the geomorphological processes that create landforms?
- How do similar types of landforms differ around the world and what factors determine these differences?
- What impact do people have on landforms, landscapes and surrounding regions?
- In what ways do Aboriginal and Torres Strait Islander peoples value landscapes and landforms and how do they contribute to their protection and management?
- How do people respond to and manage hazardous or beneficial geomorphological processes?
- How do diverse cultures attach and interpret spiritual, aesthetic and social values to landscapes and landforms?



▲ **Figure 4.1** A monument at the site of Okjokull, Iceland's first glacier lost to climate change in the west of Iceland, unveiled in August, 2019.

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4

4.1 What are the geomorphological processes and forces acting on the Earth's surface that produce different landscapes and significant landforms?

FOCUS QUESTIONS

- What are landscapes and landforms?
- What are some geomorphic processes that form the Earth's landscapes and landforms?

landscape the visible features of an area including both the natural (mountains, forests, rivers etc.) and human (roads, houses, bridges etc.) elements

landform a naturally formed feature on the Earth's surface, having a characteristic shape or form

valley an area of low land between hills or mountains

For many people, their most vivid memories are from holidays, of the places they have been and seen. When we remember our holidays, we remember not only the experiences we had, but also the features of the locations where they took place, the buildings, countryside, ocean, mountains or trees – the **landscape**. A landscape is the collection of visible human and natural features found in a particular area of the Earth's surface. Human features include the built environment, such as a town or city, as well as where humans have altered the environment for their use, such as farmland or a park. Natural features are those not created by humans, such as a mountain, beach or cave. A **landform** is a natural feature of the Earth's surface with a definable shape or form, such as a **valley**, cliff or dune. Most landscapes comprise a range of landforms and other natural and human features.



▲ **Figure 4.2** How many different landforms and human features can you identify in this Swiss mountain valley?

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ACTIVITY 4.2
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Creating a field sketch

As geographers, we create field sketches of landscapes and landforms to record what we observe. A field sketch does not need to be drawn to scale, nor does it require outstanding artistic talent. It is a simple and visual way to identify major features using geographic terminology to annotate and locate features such as mountains, trees, rivers and roads. Geographers use field sketches to create a broad overview of an area they are studying.

A field sketch is usually drawn from observation on a field trip, but we can practise what is involved using the photo in Figure 4.2:

1. Study the photograph in Figure 4.2 and make a list of the features you can already identify.
2. Using a soft pencil (it makes it easier to erase mistakes) and a blank sheet of paper, draw a frame the same shape as Figure 4.2.
3. Divide the scene you wish to sketch into three parts: the foreground, middle distance and background.



4. Sketch in the main features or lines of the scene in the foreground. Repeat for the middle distance and background. Refer to the list you made when you first examined the image.
5. Using the list you created in step 1, mark in other prominent features or lines, such as roads, railway lines or rivers.
6. Add detail if appropriate. Details may include buildings, trees and fences.
7. **Use** shading and/or colour to highlight the key features of your field sketch. Avoid making your sketch too cluttered.
8. Label and annotate the main features of the sketch (mountains, trees, rivers etc.).
9. Give your field sketch a title and note the date of the observation.

Extension task

1. Choose a place near your school or home and try to draw a field sketch from your own observation.
2. On your sketch, annotate at least three different landforms and three human features visible in the photograph.

Different types of landscapes

Geographers use the features that dominate in a particular location to distinguish between and categorise landscapes. For example, an area with many trees is described as a forest landscape and an area with many buildings is an urban landscape. Most of the major types of landscapes identified by geographers are found throughout the state of Queensland. Figure 4.3 describes different types of landscapes and provides examples of where they are located. One landscape not found in Queensland is polar landscapes, the regions surrounding the north and south poles that are characterised by ice, snow, permafrost (a frozen layer beneath the Earth's surface) and glaciers, which are slowly moving rivers of ice.

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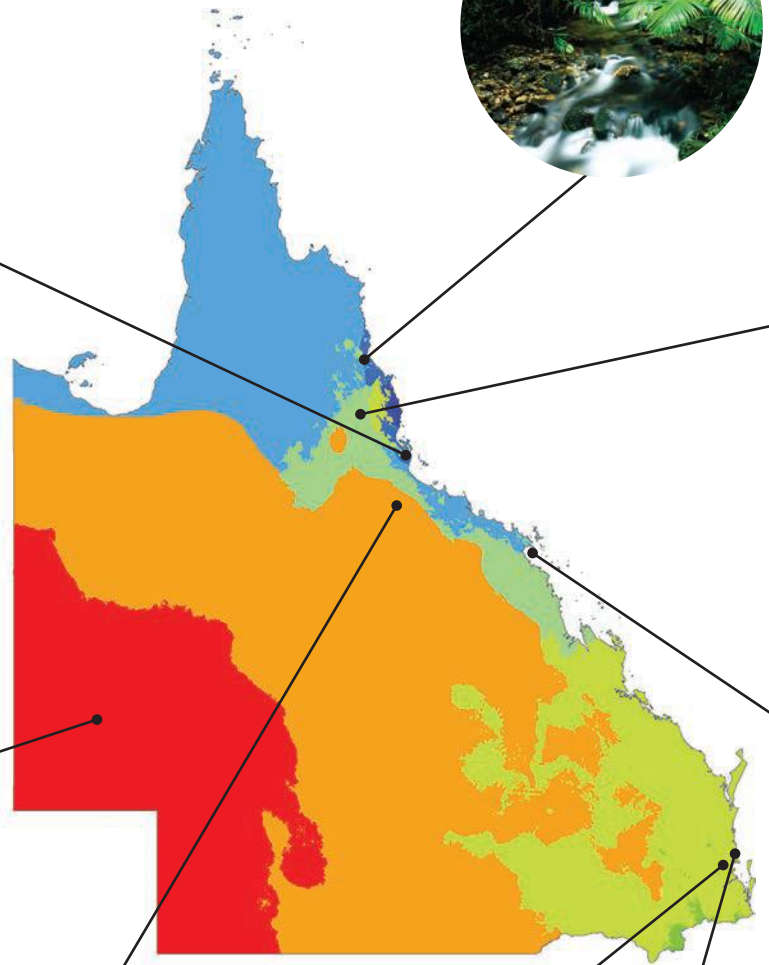
You should also remember that throughout this chapter, you are learning about different types of landscapes through the lens of 'traditional geography'. First Nations Peoples in Australia also use culturally informed ways to describe these landscapes. As you learn about the landscapes mentioned in Figure 4.3, you might like to consider the ways that First Nations peoples describe these places. Many of the rivers (see Riverine or Urban landscapes in Fig 4.3) across Queensland are known by names that were given by colonial explorers and commemorate significant individuals from colonial history. For example, the Brisbane River is named after Sir Thomas Brisbane, the British Governor of New South Wales from 1821-1825. You might like to find out the name that traditional owners gave this river (and other rivers across Queensland where a similar situation has occurred). How does knowing the names or traditional stories associated with the river change the way in which you 'think geographically' about these landscapes?

Another example that might help you understand how to think more expansively about landscapes in Australia are the Glasshouse Mountains (see Volcanic landscapes in Fig 4.3). These peaks were given this collective name by the British explorer Lieutenant James Cook in 1770. However, to the Jinibara and Kabi Kabi people, the local Traditional Owners, these mountains are highly significant. You might like research what are the traditional names or any Dreaming stories associated with these mountains. How does knowing this knowledge help you understand this landscape more fully? How might knowing this information change the ways in which you are learning to 'think geographically'

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Climate types

- Oceanic
- Humid subtropical
- Monsoon-influenced humid subtropical
- Cold semi-arid
- Hot semi-arid
- Hot desert
- Savanna
- Monsoon
- Rainforest





Forest landscapes – dominated by trees; for example, the tropical rainforests of the Daintree Rainforest, Nth QLD



Mountain landscapes – where the Earth's surface rises dramatically, creating steep, peaked landforms; for example, the highest mountain in QLD, Mt Bartle Frere at 1611 meters, located just south of Cairns in the Great Dividing Range



Karst landscapes – where underground water dissolves limestone to create distinct landforms, such as cliffs and caves; for example, the Chillagoe-Mungana caves, Nth QLD



Arid landscapes – where there is very little available water, limiting the growth of plants and diversity of animals; for example, the Sturt Stony Desert



Coastal landscapes – where the land meets the sea and the surrounding area; for example, Airlie Beach, Central QLD



Riverine landscapes – include rivers, the landforms created by the movement of rivers and the surrounding ecosystems; for example, the Burdekin River, Central QLD



Urban landscapes – where human buildings and activities dominate; for example, the city of Brisbane



Volcanic landscapes – feature landforms created by volcanic activity; for example, the Glass House Mountains, Sunshine Coast hinterland, SE QLD

▲ **Figure 4.3** Queensland has many different types of landscapes that relate directly to the climate in which they occur.

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ACTIVITY 4.3

Check your understanding

1 **Explain** what geographers mean by the term 'landscape'.
2 **Identify** three different types of landscapes and give an example of where each is located in Queensland.
3 **Explain** what is meant by the term 'iconic'. List reasons why a landform or landscape may be considered iconic.
4 Using the guide to different types of landscapes in Figure 4.3, **identify** which type of landscape the following locations are located in:
   a Beerwah (Sunshine Coast Hinterland region)
   b Airlie Beach
   c Daintree Rainforest
   d The suburbs of the Gold Coast
5 Choose one of the landscapes identified in Figure 4.3. With a partner, develop a series of reasons to convince them why that would be the best place to live in Queensland.
6 Choose a specific location that can be found in a different landscape (see Figure 4.3) to the one you have chosen in Question 5. Research how First Nations Peoples describe this landscape. Are there specific First Nations names or stories associated with the landscape?

What are some geomorphic processes that form the Earth's landscapes and landforms?

Around the world, diverse landscapes and landforms are shaped by unique interactions of both geology and climate. These interactions are known as geomorphological processes. As you learn about different landscapes and landforms you will also need to learn how these geomorphological processes interact to produce different landscapes and landforms.

processes the physical or human forces that cause change to a landscape

spatial scale the size or magnitude of a geographic process, feature or event

time scale the period of time over which a geographic process or change has taken place

plate tectonics the theory that the Earth's land masses are in constant motion

The world's landscapes are constantly changing, shaped by natural and human forces, such as erosion or land clearing, known as **processes**. Geographers study the size or magnitude of these changes (**spatial scale**; for example, local, regional or global), and the speed or rate of the changes (**time scale**; for example, rapid or geological – over hundreds of thousands or millions of years). Geomorphic processes are those that specifically change the features of the Earth's surface. This section outlines the main geomorphic processes shaping landscapes and the types of landforms they create.

Plate tectonics

In 1977, the Tharp-Heezen map of the seafloor was published. For the first time, humans could see what the Earth looked like if it had no water. The research behind this map led to science adopting the theories of **plate tectonics** and continental drift that had been proposed at the beginning of the 20th century.

▲ **Video 4.1**
Continental drift

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Continental drift was first proposed in 1915 by Alfred Wegener, who wondered why Africa and South America appeared to fit together like jigsaw puzzle pieces. In 1963, two British geologists showed that the surface of the Earth was broken up into a series of continental plates.

Interesting fact

In 2017, scientists declared that the continent of Zealandia fulfilled the requirements to be considered a drowned continent rather than a continental fragment. This brought the number of recognised continents around the world to eight.



▲ **Figure 4.4** Map showing the continental limits of the submerged continent Zealandia



▲ **Figure 4.5** Ball's Pyramid, part of the Lord Howe Island Marine Park in Australia, is the summit of one of the submerged mountains of Zealandia. It is the remnant of an eroded shield volcano and caldera.

The Earth is comprised of different layers. The outer layer, the crust, is made up of sections known as tectonic plates. The plates rest on a layer of magma (molten rock), known as the mantle. The process of plate tectonics describes how tectonic plates move as a result of convection currents in the Earth's mantle. Figure 4.6 illustrates the process of convection currents. The direction of this movement and the types of plates involved create different landforms.

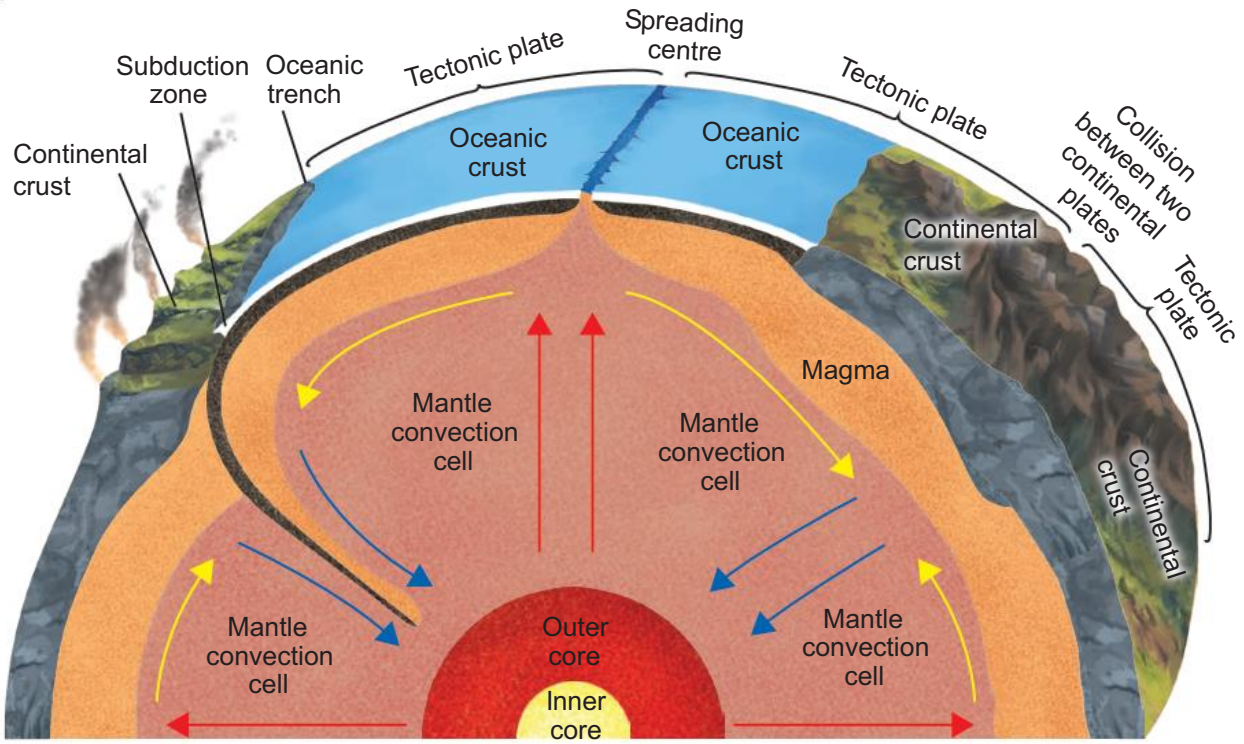
There are two types of tectonic plates: **continental plates** – the Earth's landmasses, 25–90 kilometres thick and made mostly from granite (around 10 per cent less dense than basalt, lighter); and **oceanic plates** – the ocean floor, 5–10 kilometres thick and mostly basalt (heavier and around 10 per cent more dense than granite). The place where the edges of two plates meet is called a plate boundary. Three types of movement occur at the plate boundaries: convergent, where two plates crash into each other; divergent, where two plates pull apart; and transformative, where two plates slide past each other. Figure 4.9 describes examples of each type of movement and examples of landforms resulting from the process.

continental plates the Earth's landmasses, 25–90 kilometres thick and made mostly from granite

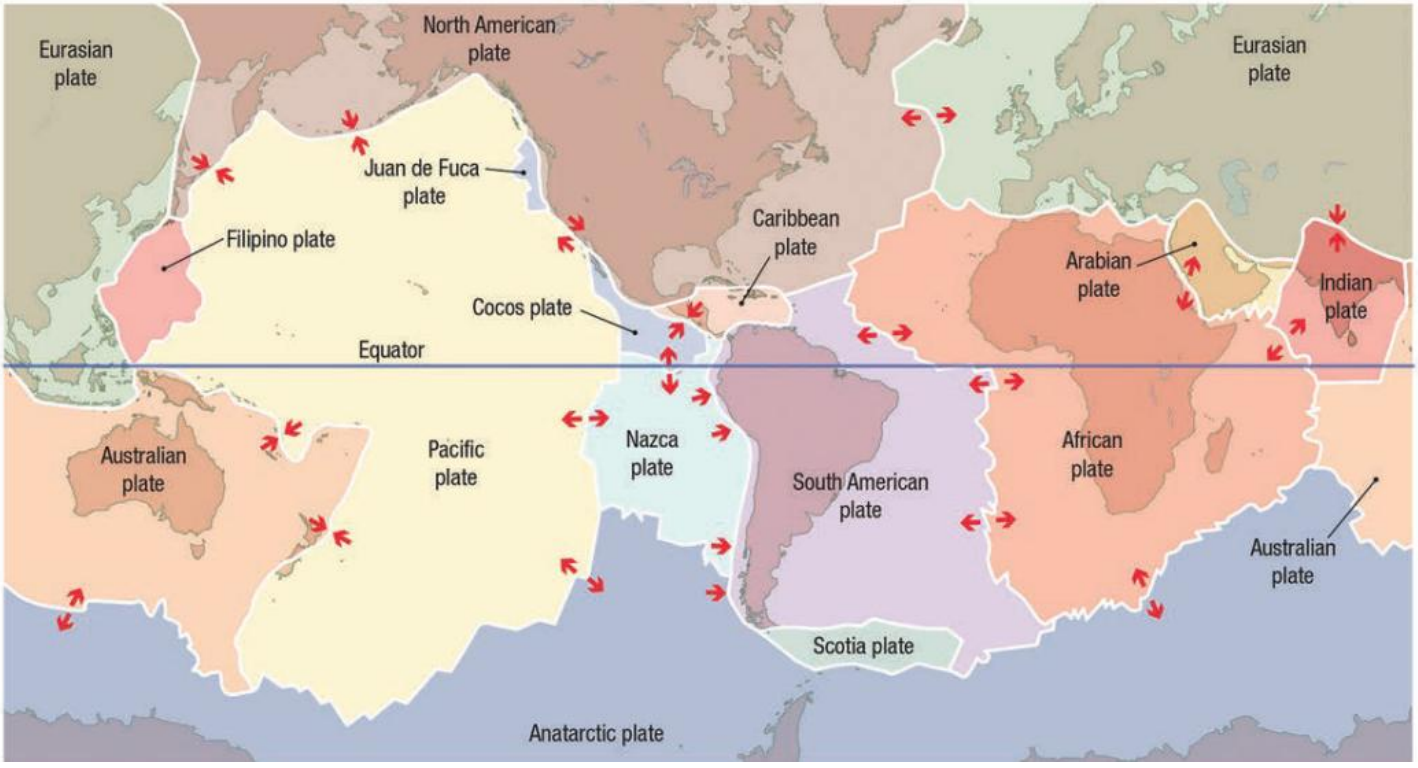
oceanic plates the ocean floor, 5–10 kilometres thick and made mostly from basalt

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continental drift the theory that continents move relative to each other over time



▲ **Figure 4.6** As the magma heats up, it rises towards the Earth's crust. This upward movement by heat is called convection, which forces the magma along the crust, pushing the tectonic plates in different directions. The magma also finds cracks in the Earth's crust and pushes through to the surface as a volcano. It then eventually starts to cool and moves towards the Earth's core, where it heats up again. This creates a current that contributes to the process of **continental drift**.



▲ **Figure 4.7** The tectonic plates and the direction of plate movement. Can you identify the plates the continents are based on?

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What are the different types of tectonic plate boundaries?

CONVERGENT: COLLISION BOUNDARY

When two continental plates collide together, the effect is the same as a head-on car crash. The surface of the crust crumples, creating folds and faults (cracks). As the folds push upward, they can create large mountain ranges such as the Himalayas. Earthquakes are also common at these boundaries.

CONVERGENT: DESTRUCTIVE BOUNDARY

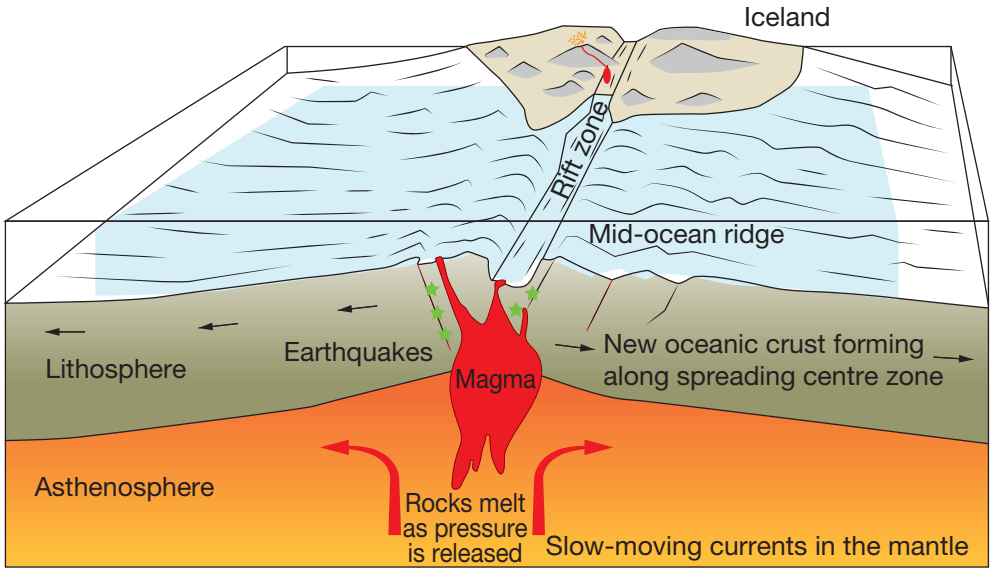
When a continental plate collides with an oceanic plate, the heavier oceanic plate is forced under the lighter continental plate, into the magma of the mantle. This process is called **subduction**. The location where it occurs is called a subduction zone and creates an **oceanic trench**, where the oceanic plate is pushed under the continental plate. **Fold mountains** are formed at the point where the continental plate crumples as it crashes into the oceanic plate. Subduction also creates volcanoes and causes earthquakes.

DIVERGENT: CONSTRUCTIVE BOUNDARY

When two plates pull apart, pressure from magma pushes the edges of the plates upward and magma rises to the surface to create new crust. This process results in volcanic activity and creates **mid-ocean ridges** if two oceanic plates are diverging, or **rift valleys** if continental plates are diverging.

TRANSFORMATIVE: CONSERVATIVE BOUNDARY

When two plates slide past each other, huge amounts of friction are created. Over time, pressure builds until the plates move, creating **faults** in the crust. These look like long thin valleys on land or canyons under the ocean. The sudden release of pressure also causes intense earthquakes.



▲ **Figure 4.8** The formation of the mid-ocean ridge close to Iceland

subduction where two tectonic plates are colliding and an oceanic plate is forced under another plate into the magma of the mantle

oceanic trench a long, deep underwater chasm created where an oceanic plate subducts under a continental plate, forming the deepest parts of the oceans

fold mountains mountains created by the crumpling of the Earth's surface where two tectonic plates are colliding

mid-ocean ridges underwater mountain chains created by the pressure from rising magma where two oceanic plates are diverging

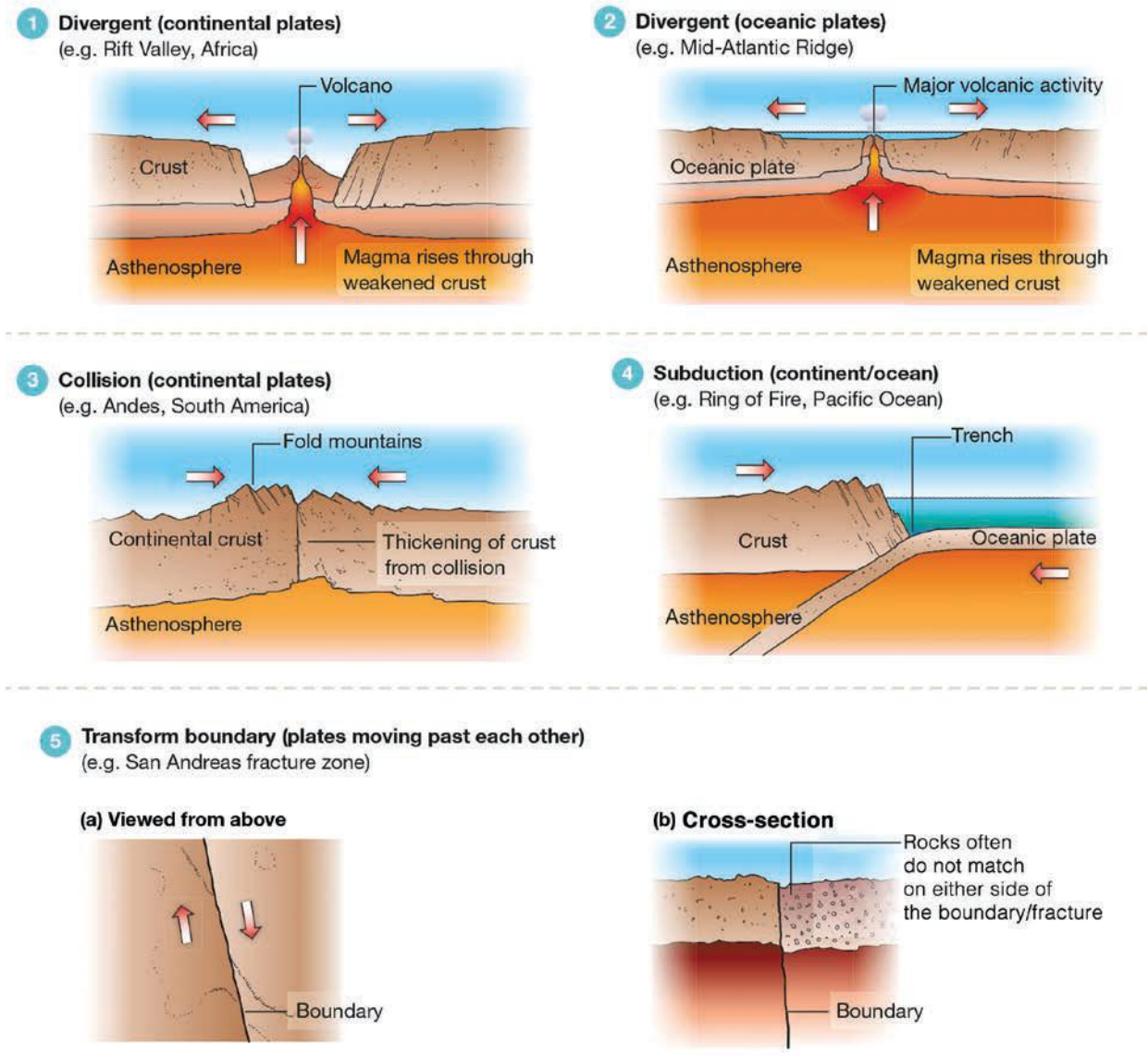
rift valleys long valleys created where two continental plates are diverging

fault a crack or fracture in rock

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▲ **Figure 4.9** Different types of plate boundaries



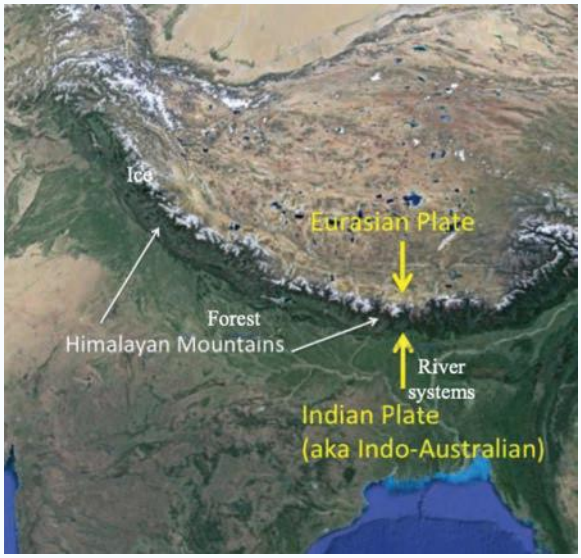
► **Figure 4.10** The Silfra Fissure in Iceland. This fissure is the point where the North American and the Eurasian plates drift apart at a rate of about 2 cm per year. Refer to the map of tectonic plates in Figure 4.7 and the different type of plate boundaries in Figure 4.9. What type of plate boundary do you think the fissure is?

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CASE STUDY 4.1

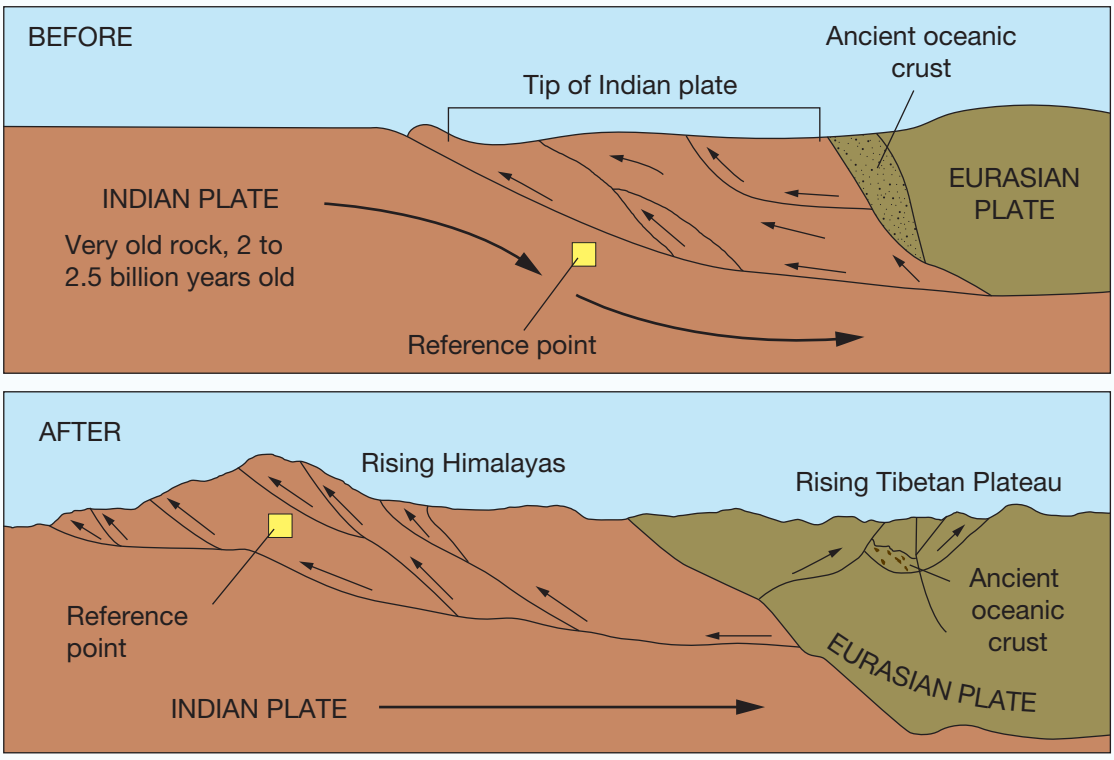
The Himalayas: a collision boundary

At the beginning of this chapter, you learned about Mt Everest, found in the world's greatest mountain range, the Himalayas. Located in Asia, this mountain range stretches 2400 kilometres east to west across India, China, Nepal, Bhutan, Pakistan and Afghanistan, and features the 10 highest mountains in the world. As well as imposing mountains, the Himalayan landscape comprises other significant landforms, including more than 15 000 glaciers, plateaus, river gorges and valleys. The range contains more ice than anywhere other than the Arctic and Antarctic, and is the source of major Asian rivers: the Mekong, Yellow, Yarlung, Yangtze, Ganges, Indus and Nujiang.



▲ **Figure 4.11** Plate boundaries that have formed the Himalayas

The sheer size of the Himalayan mountains is the result of the convergence of the Eurasian and Indian continental plates. For 50 million years, the two gigantic slabs of the Earth's crust have crashed together, folding, faulting and pushing up the Earth's surface, creating the massive mountains of the Himalayas. This process is ongoing, with the mountains rising by around 1 centimetre per year, although this increase is offset by the processes of erosion and weathering.



▲ **Figure 4.12** The formation of the Himalayas

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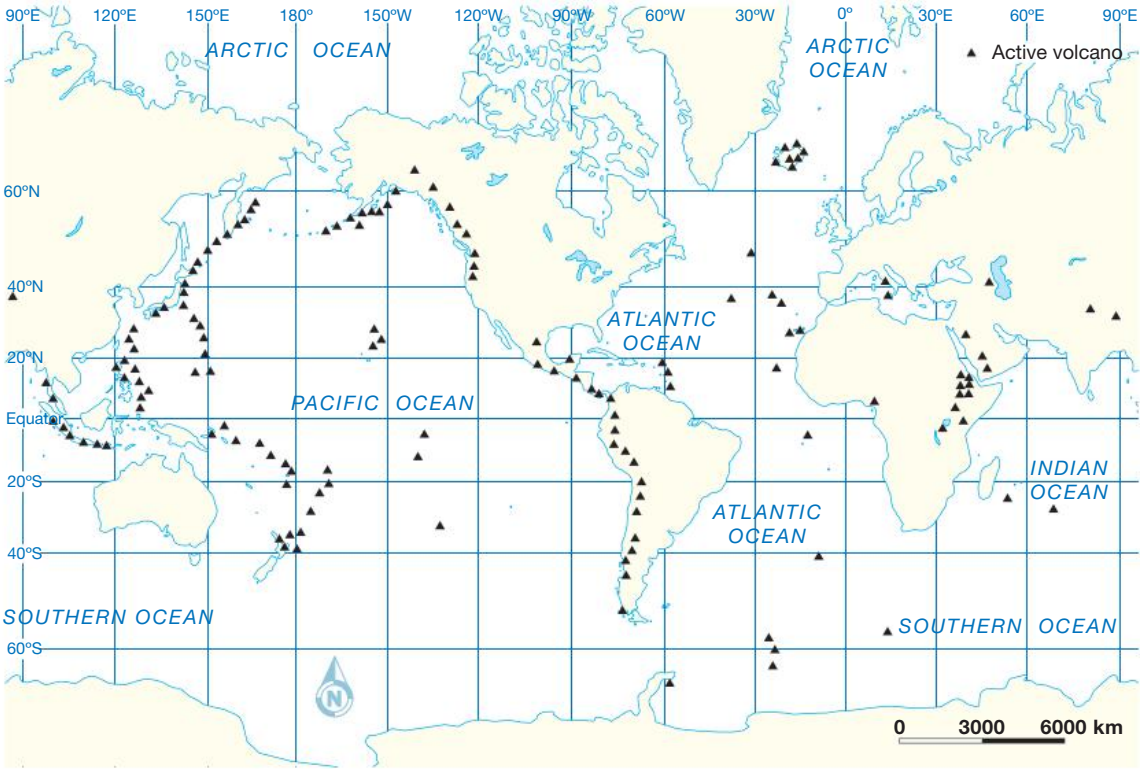


▲ **Figure 4.13** Mt Everest is the highest peak in the Himalayan mountain range. What landforms (other than mountains) can you identify in the photo?

What are the geomorphic processes that produce volcanic landforms?

Earlier in this chapter, we learned about the volcano Mt Nyiragongo in the Democratic Republic of Congo. The incredible force that is a volcano results from two main processes: the movement of tectonic plates and volcanic eruptions. As the plates move, propelled by currents in the magma, they collide, pull apart and slide past each other. The weaknesses in the Earth's crust resulting from this movement is where most volcanic activity occurs, particularly in subduction zones and where plates are diverging or pulling apart.

This section describes how the movement of tectonic plates creates volcanoes and explains the factors that affect the nature of volcanic eruptions and the type of landforms that result.



▲ **Figure 4.14** Map showing recent volcanic eruptions

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ACTIVITY 4.4

Identifying patterns

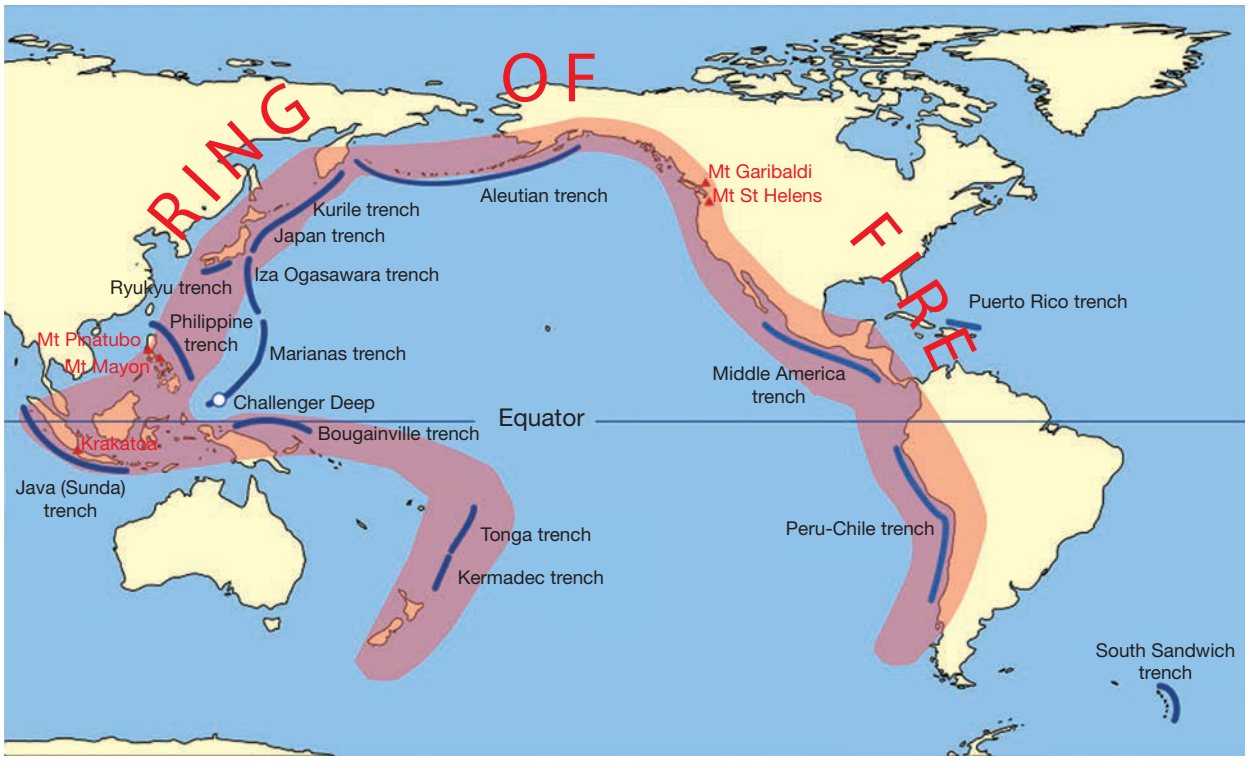
Examine Figures 4.7 and 4.14.

Identify the trends, patterns and relationships between tectonic plates and volcanic activity. **Consider** where volcanic eruptions occur in relation to the plates. Are there any patterns or do there appear to be some regions where the pattern doesn't apply? Do all volcanic eruptions fit the pattern? Note any general exceptions and **identify** specific regions where the pattern does not appear to hold.

In the first part of this chapter, you learned about plate tectonics and the various types of plate boundaries that exist. You may wish to review these differences before continuing. The differences that exist between different types of volcanoes are caused by the differences between the different plate boundaries.

Volcanoes along subduction boundaries

Along a subduction boundary, as the oceanic plate is forced under the other plate into the mantle, the extreme heat melts the rock of the plate turning it into magma. The magma rises upwards, forcing its way through weaknesses in the Earth's crust.



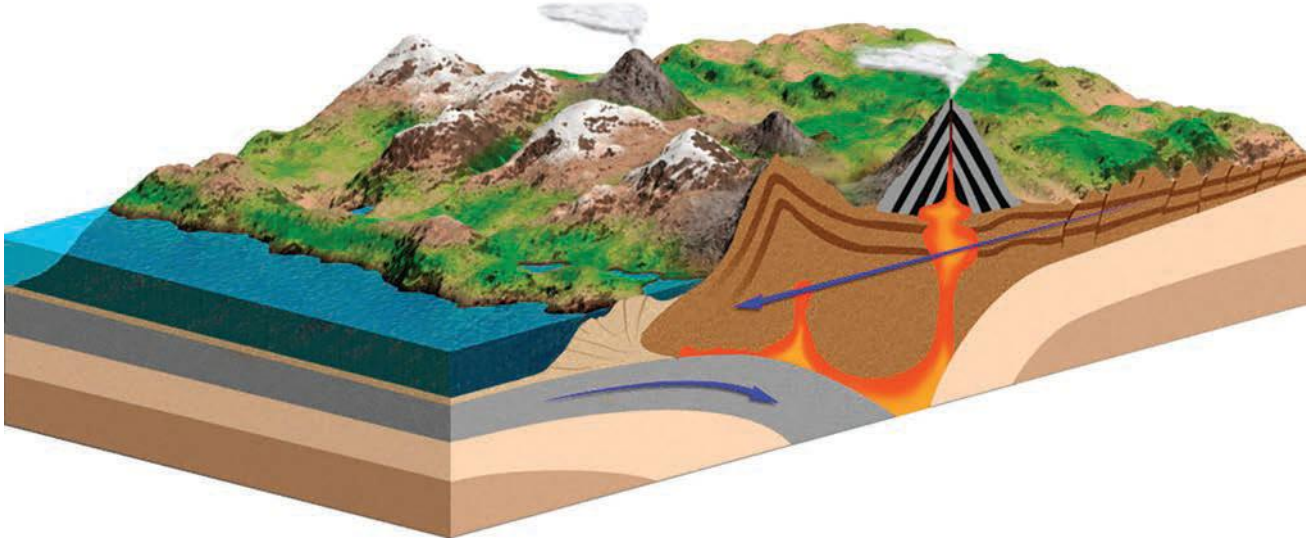
▲ **Figure 4.15** Volcanic arcs and oceanic trenches partly encircling the Pacific Basin forming the Pacific Ring of Fire (shaded in pink), which is a zone of frequent earthquakes and volcanic eruptions. The blue lines mark the locations of the trenches. Volcanic island arcs are parallel to, and always landward of, the trenches. For example, the island arc associated with the Aleutian trench is represented by the long chain of volcanoes that make up the Aleutian Islands.

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If it reaches the surface, it forms a volcano, usually a highly explosive stratovolcano. This process creates lines of volcanoes around 100 kilometres from the plate boundary, known as a volcanic arc if on a continental plate, or an island arc if on an oceanic plate. The Pacific Ring of Fire, a ring of volcanoes on the edge of the Pacific Plate, is created by the process of subduction. It comprises more than 75 per cent of the world's volcanoes, including volcanic arcs in the Andes mountain range in South America and island arcs such as Japan and the Philippines.

INTERPRETING A BLOCK DIAGRAM

In geography, block diagrams are used to show a geographic process. Figure 4.16 shows a subduction zone. The different layers of the Earth appear as different colours and the arrows represent the movement of the tectonic plates. This movement creates different landforms such as mountains and volcanoes.



▲ **Figure 4.16** A subduction zone. The oceanic plate is forced under the continental plate and into the mantle. It melts then rises through weaknesses in the Earth's surface to create a line of volcanoes inland from the coastline.

ACTIVITY 4.5
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

The process of subduction

Create a two-dimensional sketch of a subduction zone. It will look like the longer side of the block diagram in Figure 4.16. **Use** arrows to show movement of plates and magma. **Identify** the zone where melting occurs and where volcanoes form. Label the sketch to **describe** the process of subduction.

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Volcanoes along divergent boundaries

Along a divergent boundary, pressure from magma pushes the edges of the plates upward and magma rises to the surface to create new crust: a mid-ocean ridge if two oceanic plates are diverging, or rift valleys if continental plates are diverging. Weaknesses in the Earth's surface along the ridge or valley, often **fissures**, allow magma to erupt to the surface, usually forming less explosive shield volcanoes. Mt Nyiragongo, and the other volcanoes of the East African Rift, are formed by this process. Iceland, which sits on a section of the Mid-Atlantic Ridge that has risen above the ocean, is literally being pulled apart as the North American plate separates from the Eurasian plate, making it one of the world's most active volcanic landscapes.

fissure long, thin crack



▲ **Figure 4.17** The Thingvellir Valley, Iceland, was created by the divergence of the Eurasian and North American tectonic plates.

CASE STUDY 4.2

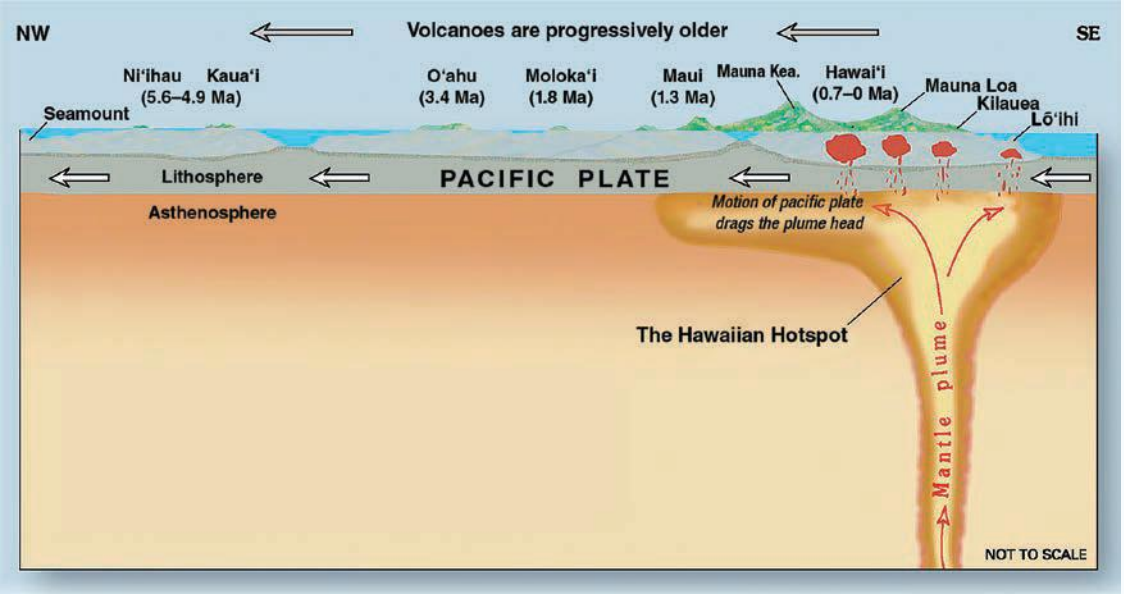
Hotspots: the exception to the rule

In volcanism, like most things, there are often exceptions to the rules. Although the vast majority of volcanoes are located near the boundaries of tectonic plates, this is not always the case. The East African Rift is not technically on the boundary of two plates, it is still a developing divergent plate boundary, where the African plate is slowly dividing, creating two new plates. A small number of other volcanoes, such as the Hawaiian Islands shown in Figure 4.18, are located in the middle of plates. These are formed by **hotspots**, weaknesses in the Earth's crust that have allowed volcanoes to form. In the case of Hawaii, the weakness was initially on the ocean floor and built up to form a chain of volcanic islands, including Mauna Kea, the world's tallest volcano. Measured from its base beneath the sea, it reaches more than 10 000 metres, also making it the world's tallest mountain. It is worth noting that this is Mauna Kea's height from its base beneath the ocean. Mt Everest in the Himalayas is the mountain with the highest altitude above sea level.

hotspot area of volcanic activity away from the boundaries of tectonic plates

»

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▲ **Figure 4.18** The islands of Hawaii have formed through hotspot volcanoes. How old they are is measured in Ma (mega-annum, equal to one million years).



▲ **Figure 4.19** Mauna Kea, a shield volcano on Hawaii's Big Island, is the world's tallest mountain when measured from base to peak. The height of the volcano is evident from the snow that regularly covers its summit despite its tropical location.

Volcanic eruptions

The movement of tectonic plates explains the location of most volcanoes. However, it is the nature of the volcanic eruption that shapes the landforms featured in volcanic landscapes. Violent, explosive eruptions result in the landforms created by destructive processes.

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Less explosive eruptions result in the landforms created by constructive processes. The main factor that determines the explosiveness of an eruption is the **viscosity** of magma. Less viscous magma is runnier, passing through a vent more easily, resulting in regular, less explosive eruptions. Highly viscous magma is thicker, building up pressure as it is forced through a vent, resulting in less regular but more explosive eruptions. The most violent eruptions happen where there is highly viscous magma and large amounts of gas in the magma chamber, a combination responsible for the massive Krakatoan eruption in 1883.

viscosity the resistance to flow, of a fluid



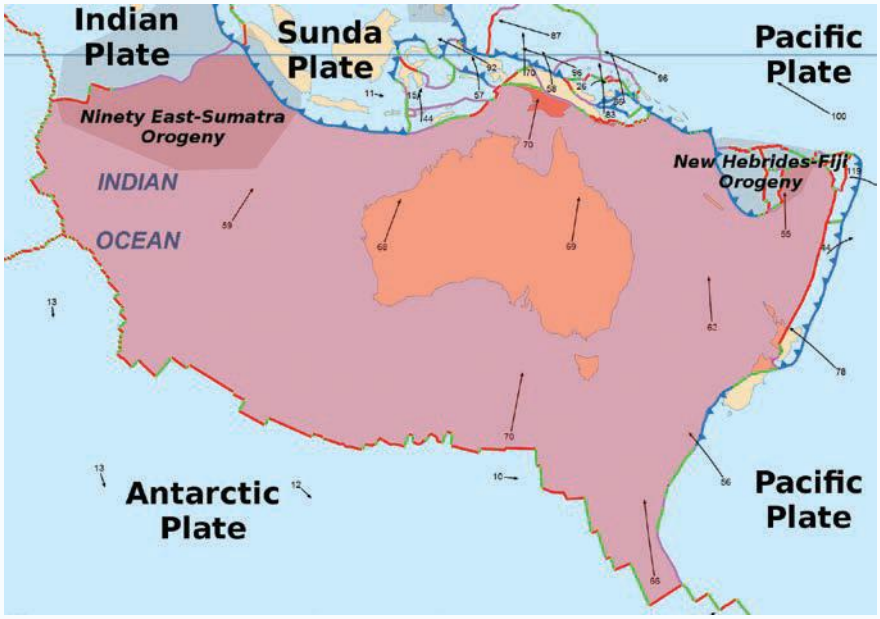
▲ **Figure 4.20** Anak Krakatoa, the 'Child of Krakatoa', in Indonesia's Sunda Strait. The Krakatoa eruption of 1883 is one of the largest and most deadly in history, killing around 36 000 people. Anak Krakatoa has been growing since it emerged roughly 40 years after the original eruption and is now a similar size to Krakatoa. Despite regular eruptions, the volcano is yet to match the explosive power of its 'parent'. This photograph is from an eruption on 19 July 2018.

CASE STUDY 4.3

Volcanoes in Australia

Volcanoes in Australia? How? We are in the middle of a tectonic plate! As you have read in this chapter, volcanoes are mostly found along tectonic boundaries around the world, with the exception of hot spots (see Case study 4.2) such as the volcano chain that is Hawaii and the United States chain through Yellowstone National Park. However, it has been recently discovered that Australia had the same ancient hotspot volcanic activity between 35 and 60 million years ago. The evidence of these volcanic remnants and lava flows can be found in every state and territory but predominantly along the east coast. It is thought that as the Australian continent was moving northward during Pangea, it moved over a hot spot in the Earth's mantle. This is where magma built up pushing through cracks in the Earth's crust to create these volcanoes that we now see fragments of today. This continental movement over the hotspot has created the world's longest chain of volcanoes, starting from central Queensland, through New South Wales to central Victoria.

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▲ **Figure 4.21** The Australian plate

The location of this chain of volcanic remnants can be seen across eastern Australia. In Queensland, well-known landmarks such as the Glass House Mountains in the Sunshine Coast Hinterland or Wollumbin-Mt Warning and its surrounding caldera, in northern New South Wales and the Warrumbungle Mountains in central New South Wales, continuing down to Mt Macedon and Tower Hill in central Victoria are all remnants of ancient volcanic activity. Most of this volcanic activity occurred millions of years ago and the volcanoes are long extinct. However, some are dormant, having erupted in the last 10 000 years. The most recent eruption was Mt Napier, Victoria around 7250 years ago. As you can see in Figure 4.23, there are many places where evidence of this hotspot activity can be found along the east coast of Australia, west of the Great Dividing Range.

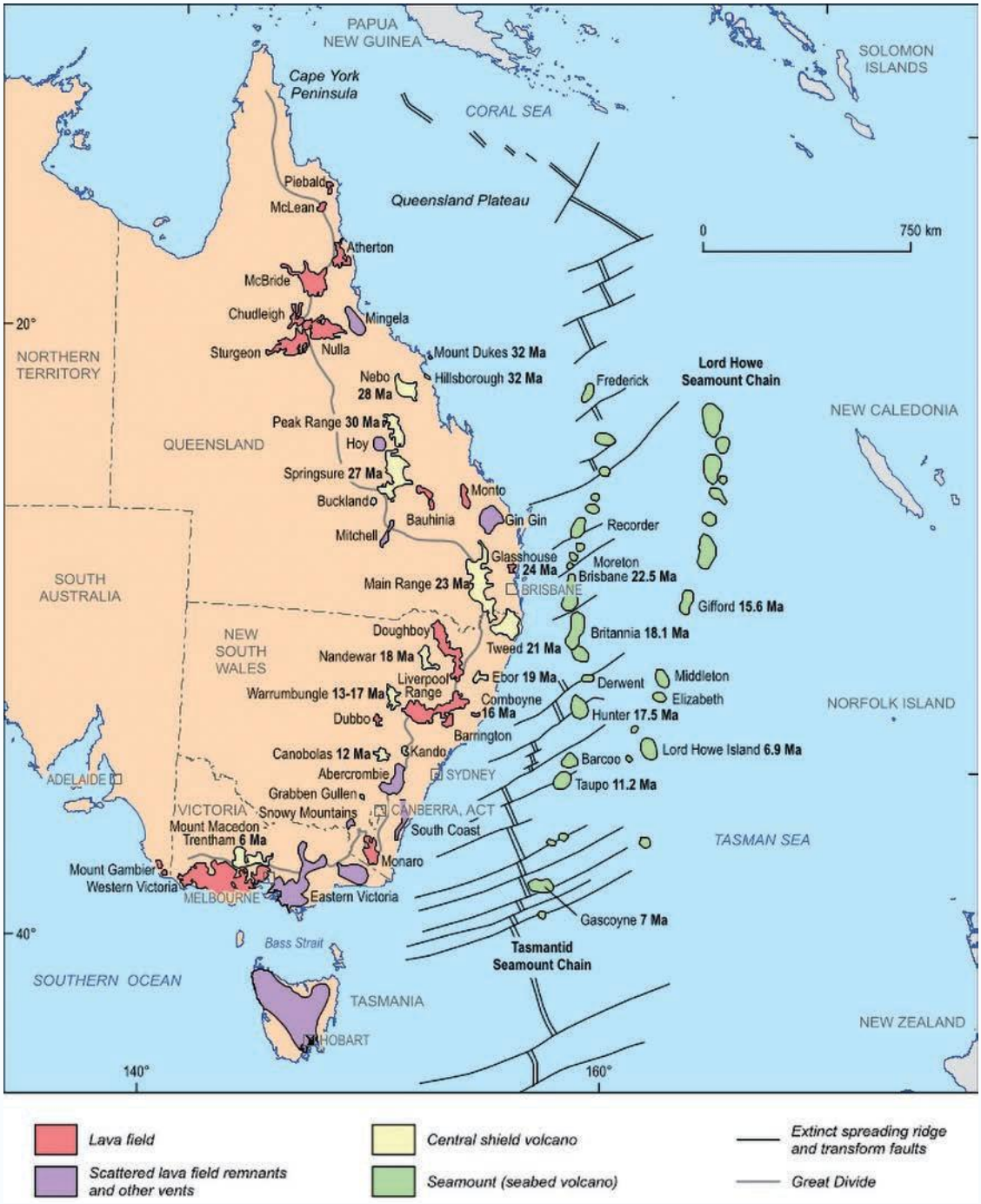


▲ **Figure 4.22** The Glass House Mountains in the Sunshine Coast hinterland. These are intrusive volcanic plugs formed around 26 million years ago.

THINKING DEEPER

Queensland also has several dormant volcanoes. As a class, discuss whether there is evidence of past volcanic activity around your home or your school. Do you think a volcanic eruption in Queensland is likely to happen during your lifetime?

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▲ **Figure 4.23** Volcanoes and lava fields in Australia

Interesting fact

The only active volcanoes on Australian land are those found on the Antarctic islands of Heard and McDonald, both of which lie approximately 4000 kilometres southwest from Perth.

The other nearest active volcanoes are in Papua New Guinea, New Zealand, Indonesia and the Philippines.



▲ **Figure 4.24** Heard Island volcano Big Ben

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ACTIVITY 4.6

Check your understanding

1 **Identify** the two main forces that create volcanic landforms.
2 Use Figure 4.7 to **identify** the following:
   a Two continental and oceanic plates
   b A convergent plate boundary
   c A divergent plate boundary
   d A transformative plate boundary.
3 **a** **Identify** the differences between oceanic and continental tectonic plates.
   b **Identify** the differences between divergent and convergent plate movement.
4 **Explain** the process that creates the deepest parts of the ocean.
5 **Identify** the ring of volcanoes that forms 75 per cent of the world's volcanoes. **Identify** the plate on the edge of which this ring is located.
6 **Explain** the process of a hotspot and how it forms volcanoes.
7 Refer to Figures 4.7 and 4.14 (the maps of plate tectonics and recent volcanic activity).
   a **Identify** two plates that are diverging and two plates that are converging.
   b **Describe** the relationship between the distribution of the world's volcanoes and plate boundaries.
   c **Explain** how subduction creates volcanoes.
8 Refer to Case study 4.1. **Create** a diagram illustrating the process that created the Himalayan mountains. Annotate your sketch to show the types of tectonic plates and direction of plate movement, magma, folding and faulting.
9 Locate on a map of Australia where Australia's historic volcanoes are found. Do you think the dormant volcanoes in Victoria are likely to erupt in your lifetime? Why or why not?

Weathering, erosion, and deposition

It was just after 9 a.m. on Sunday 3 July 2005 and a family from Sydney witnessed a rare event – one of the 'Twelve Apostles', a limestone rock formation off the coast of Victoria, collapsed into the Southern Ocean before their eyes. It just so happened that one of the members of the family had taken a photograph of the Twelve Apostles right before it collapsed. In 1990, 'London Bridge', another feature of the same coastline, also collapsed due to weathering and erosion. Two tourists were stranded and needed to be rescued by helicopter.



▲ **Figure 4.25** Two photographs of the 'Twelve Apostles' taken about one minute apart on 3 July 2005

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This section of coastline, part of the tourist attraction known as the 'Great Ocean Road', in Victoria, Australia, is made of soft limestone. The Apostles were formed by erosion as the harsh weather conditions of the Southern Ocean eroded the limestone, forming caves in the cliffs. These caves, over time, became arches which also fell down leaving the rock stacks behind. In 1922, the group of rock stacks was named 'Twelve Apostles' for tourism purposes, despite there only ever having been nine rock stacks. The Eastern Maar and Wadawurring Peoples are the traditional custodians of the lands and waters of the Great Ocean Road region. There are many cultural sites, middens and stone artefacts that can be found throughout the area. In 2023, the Eastern Maar peoples gained formal recognition of their land rights over the area.

Weathering and erosion are processes that shape the Earth's surface and create many of the most unusual and spectacular landforms. They both involve the breaking down of rocks and minerals into smaller fragments but differ in that weathered material remains in place and eroded material is transported to a new location.

There are two types of **weathering**: mechanical and chemical. Mechanical weathering is where a physical process breaks the rock into smaller fragments. This often involves changes in temperature; for example, where water seeps into a crack and is frozen, expanding and gradually increasing the size of the crack until the rock breaks. Abrasion is another form of mechanical weathering. This is where a force such as wind or the movement of a glacier causes rocks to rub together, removing fragments from their surface and polishing the rock. Smooth pebbles found in a stream or on a beach are caused by this process. Chemical weathering is where the molecular structure of the rock is changed. This process often involves interaction with water; for example, water causing a rock containing iron to oxidise (rust) or limestone to dissolve. Rocks weakened by chemical weathering are often broken down further by mechanical weathering.

weathering the process where a material is broken down into smaller fragments, either physically or chemically

agents the forces causing erosion, such as gravity, wind or water

sediment the fragmented material created by weathering and erosion, such as sand or dust

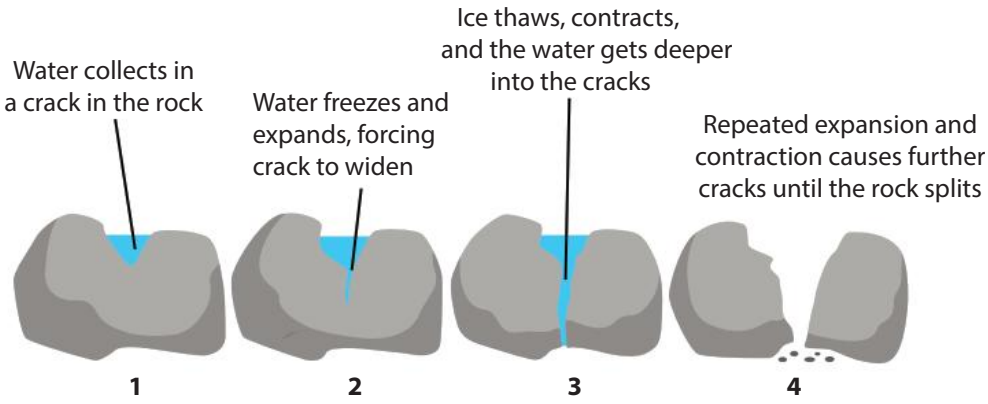
Erosion is the process where the material of the Earth's surface is worn away and moved to a new location. Different natural processes can wear materials away, including the movement of water, glaciers and wind. The movement of the fragmented material is called transportation. The forces causing the movement, such as gravity or wind, are the **agents** of erosion. The most common agent of erosion is water – rain, rivers, floods, lakes or the ocean. Fragmented material transported by water is referred to as **sediment**. Water erosion is responsible for many spectacular landforms, such as the cliffs and other rocky features found on the world's coastlines; canyons carved out by rivers, such as the Grand Canyon in the United States or Fish River Canyon in Namibia; and mountain valleys and fjords, shaped by the ice of glaciers, such as the Norwegian fjords.

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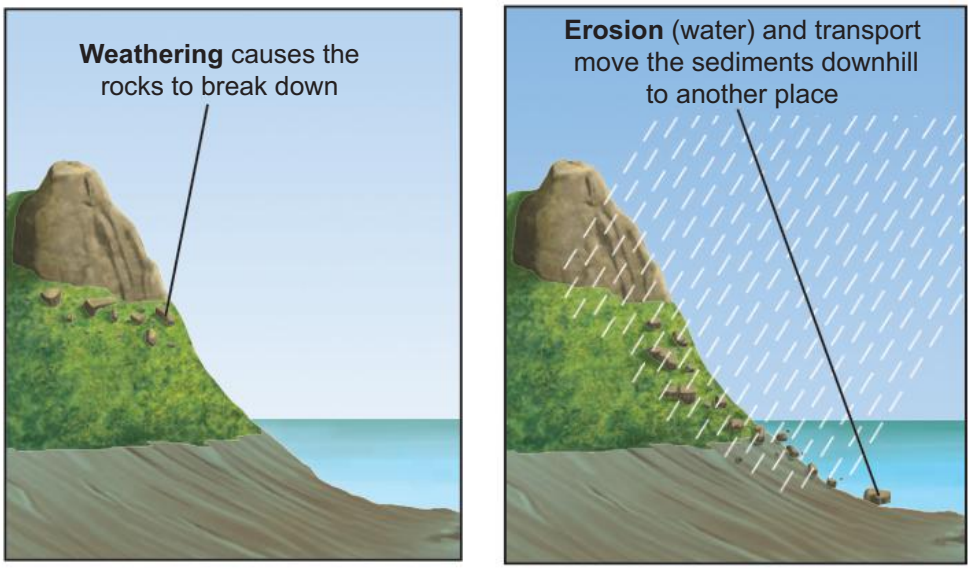
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Material transported by wind includes sand and dust. It blasts against rock and acts like sandpaper, wearing away and smoothing the rock's surface. The landform of Wave Rock in Western Australia was created by this process.



▲ **Figure 4.26** The process of mechanical weathering



▲ **Figure 4.27** The difference between weathering (left) and erosion (right)



▲ **Figure 4.28** Wave Rock, Western Australia, is a wave-shaped landform created by erosion of the granite rock.



▲ **Figure 4.29** Fairy Chimneys, eroded landforms in the Cappadocia region of Turkey. What evidence can you see of how humans use this landscape?

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Deposition occurs when an agent of erosion drops the material it is carrying; for example, dust or sand deposited by a windstorm as it calms, or sediments deposited by a river as it travels through a flatter landscape. Over time the deposited material can build up in layers creating new landforms. The lunettes of Lake Mungo were created by deposition, as are sandy coastal landforms such as beaches and dunes. **Deltas**, such as Vietnam's Mekong Delta, are usually found where rivers enter the sea. They form at the mouths of rivers when sediment is deposited at a faster rate than it can be removed by ocean currents, creating new, fan-shaped landforms.

deposition the last stage of the erosion process, when the material being moved settles on a surface

delta a fan-shaped deposit of river sediments found at the mouth of a river

Interesting fact

Unlike most deltas, Botswana's Okavango Delta is created by a river flowing inland, where the Okavango River flows into the Kalahari Desert. This forms not only a unique landform, but also a spectacular ecosystem, home to an array of wildlife including African icons such as elephants, lions, hippopotamuses and giraffes.



► **Figure 4.30** The Okavango Delta is an inland delta with unique features.



▲ **Figure 4.31** The Okavango Delta, Botswana

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4

coastal hinterland the land extending inland from the coast

coastal waters the sea extending out from the coast

erosional coastal landscape rocky coastlines with landforms shaped by erosion

depositional coastal landscape sandy coastlines with landforms created from sediment being deposited

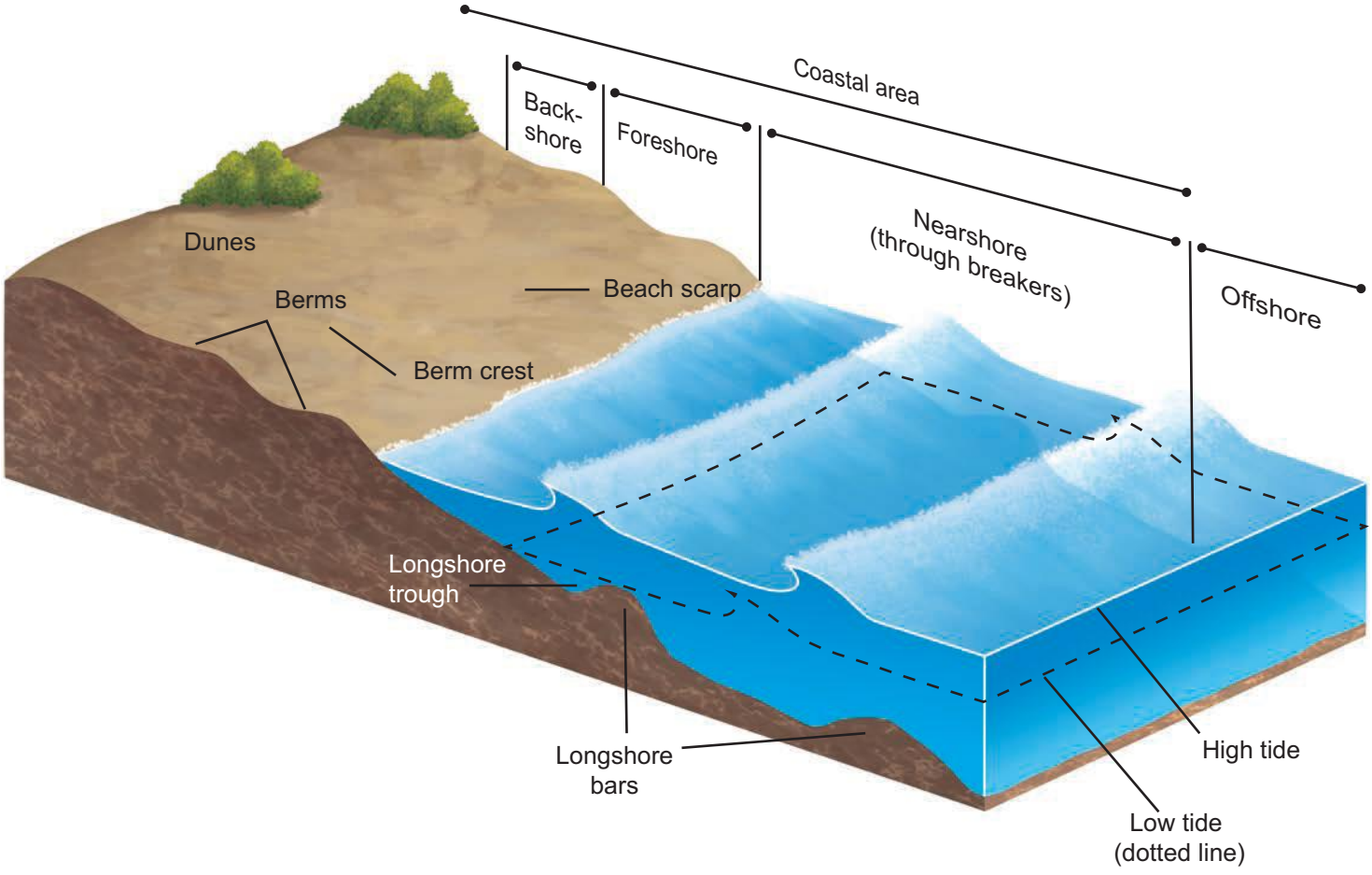
tombolo a landform where a narrow piece of land connects an island to

Coastal erosion

THE COAST

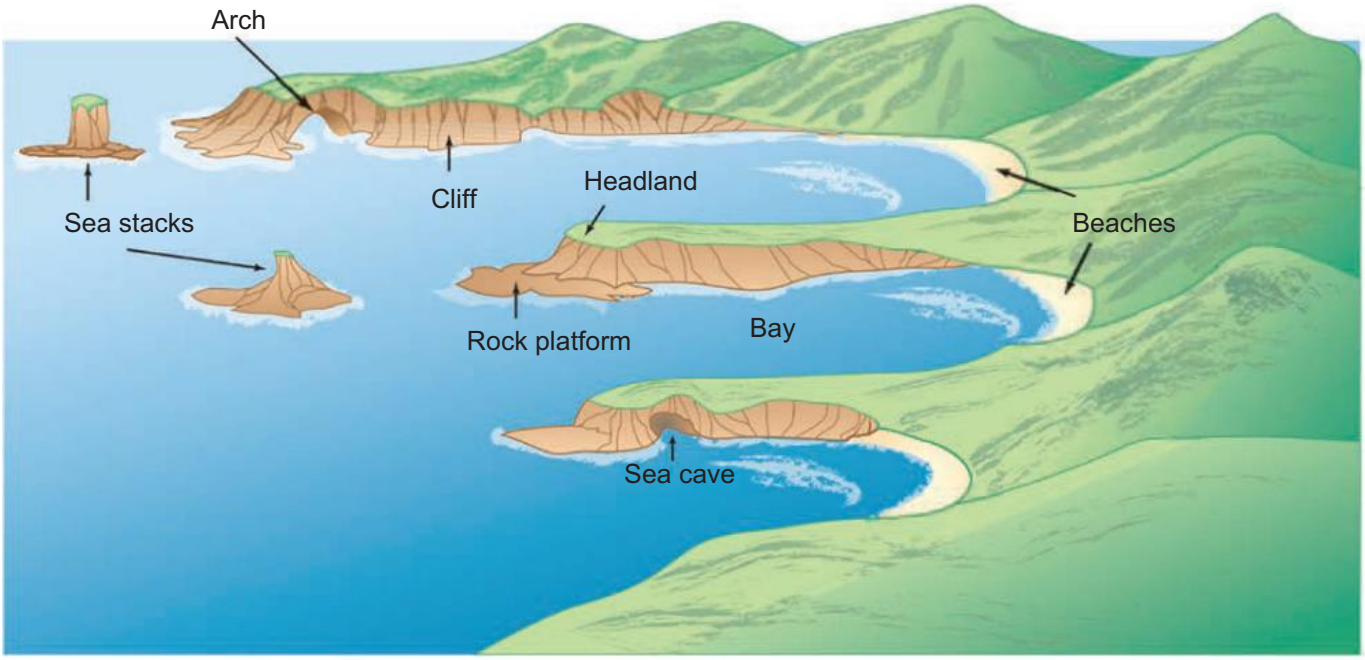
A coast is the area where the land meets the sea. Coastal landscapes include the coastline itself, the land extending inland from the coast – the **coastal hinterland** – and the sea extending out from the coast – **coastal waters**.

Geographers place coasts into two broad categories based on the processes that created them: erosional or depositional. **Erosional coastal landscapes** are the rocky coastlines featuring landforms shaped by erosion. These include cliffs, rock platforms, caves, arches and stacks. **Depositional coastal landscapes** are the sandy coastlines featuring landforms created by the depositing of sediment. These include beaches, dunes, spits, sandbars and **tombolos**.

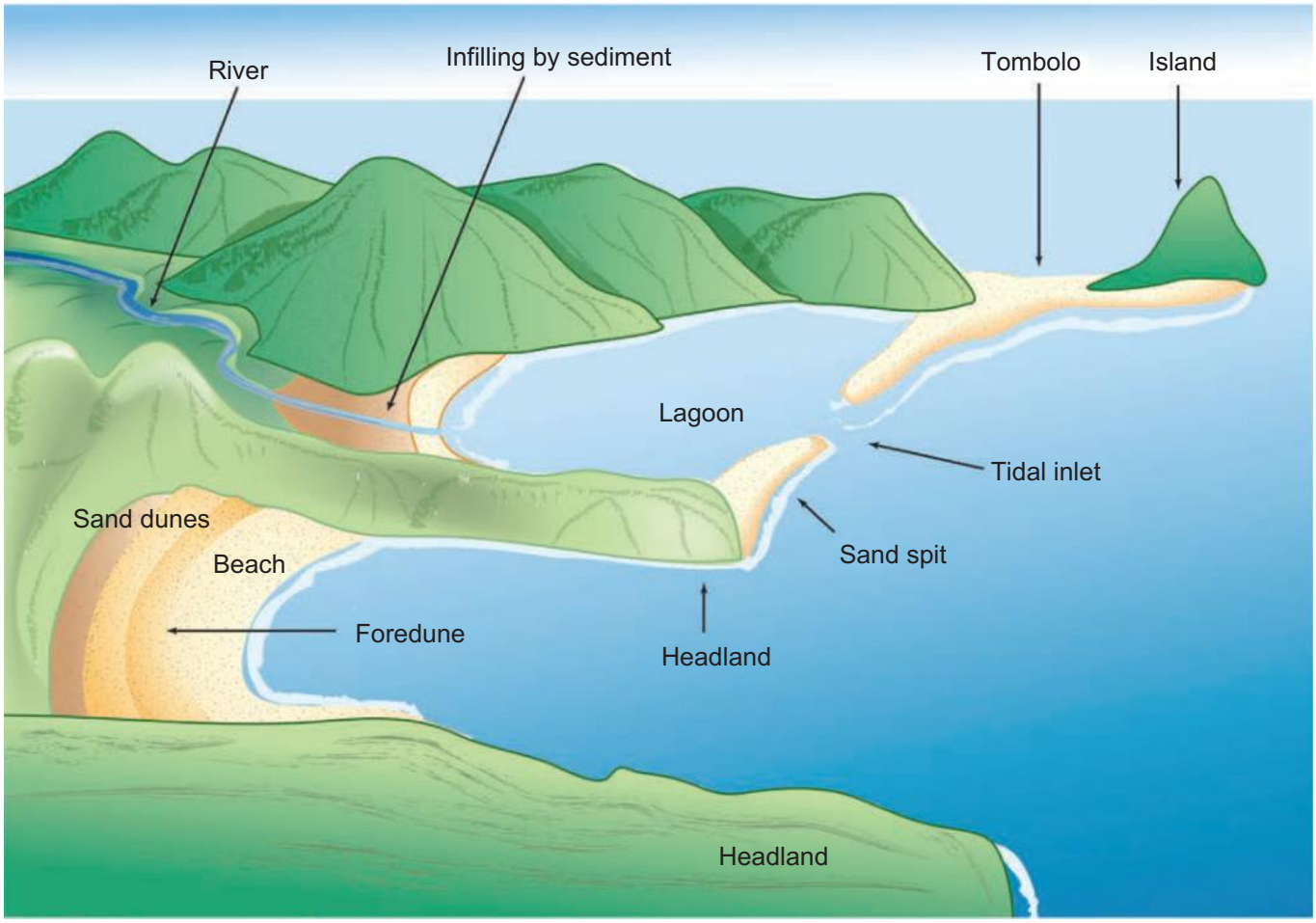


▲ **Figure 4.32** Different parts of a coastline

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▲ **Figure 4.33** Erosional landforms of coastal landscapes



▲ **Figure 4.34** Depositional landforms of coastal landscapes

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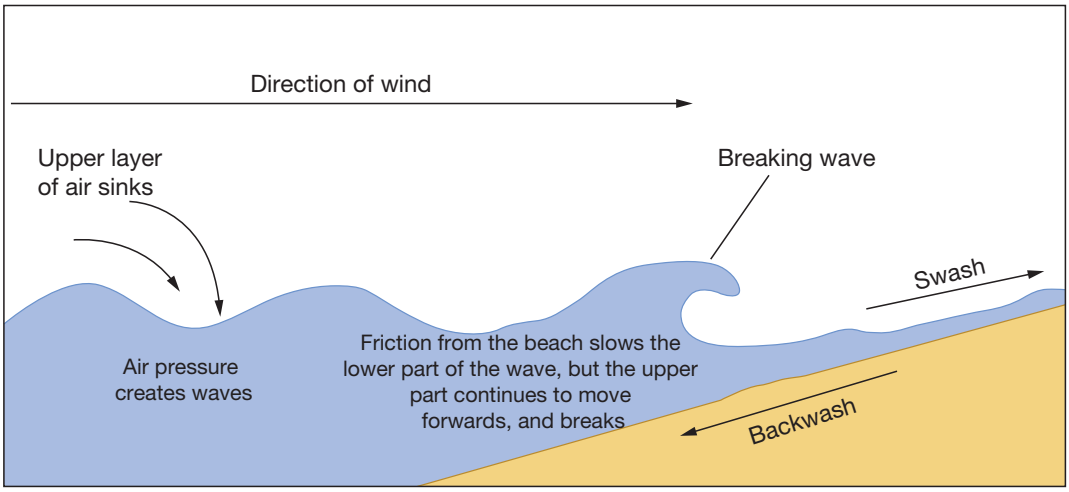
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The erosion and deposition caused by the energy of waves, wind and tides make coastal environments some of the most dynamic and changing natural landscapes. This section explains the dominant force that shapes coastlines – waves – and describes how the processes of erosion and deposition create different coastal landforms.

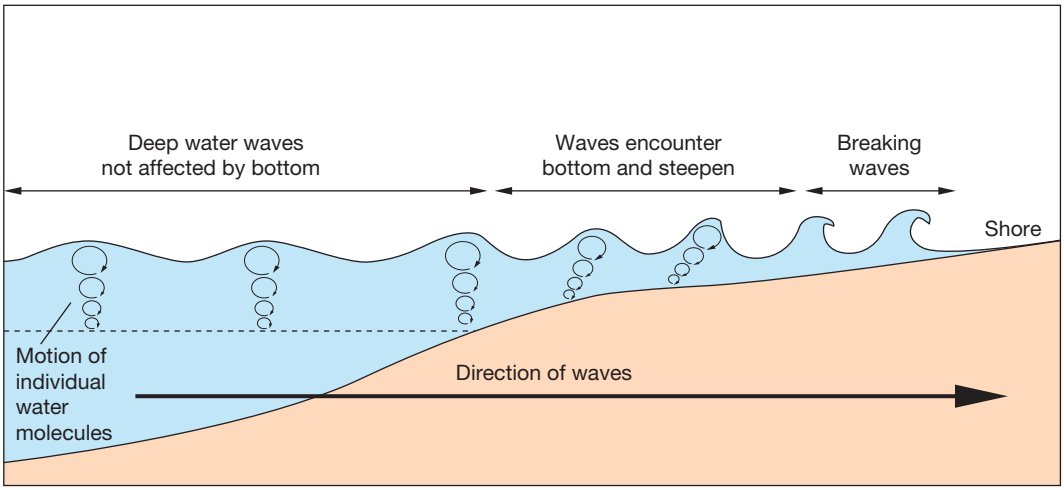
Waves

Waves are created by numerous processes, such as undersea landslides caused by earthquakes or volcanic eruptions, violent storms or the movement of tides. The most common process, however, is wind. As wind travels across water it creates friction, disturbing the surface and transferring energy into the water. It is this energy, cycling forward through the water in a circular motion, that forms the wave. The power of the wave is determined by the speed of the wind, the duration of the wind (how long it has been blowing for) and the **fetch** (the distance covered by the wind). A wave continues travelling through the water until it hits an obstacle, usually a coastline. As the sea floor becomes shallow near the coast, the energy at the bottom of the wave slows, while the top of the wave keeps moving until it spills forward and the wave breaks.

fetch the distance covered by wind that generates a wave



▲ **Figure 4.35** The anatomy of a wave



▲ **Figure 4.36** The process of wave energy creating a breaking wave

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The shape of a breaking wave is determined by the **bathymetry** and the direction of wind. Bathymetry maps show the depth of different parts of the sea floor and the shape of the underwater terrain. Figure 4.37 shows the bathymetry of a section of the Indian Ocean (you can see where this is in relation to Australia in the reference map to the bottom right of the bathymetry). This area was part of the search region for the Malaysian Airlines MH370 plane that went missing in 2014. The different colours represent different depths below sea level, with areas in red being the closest to the surface, at 2500 metres deep, and areas in purple being the furthest from the surface, at 5300 metres deep. A sea floor that ascends steeply creates larger, powerful, hollow waves; a sea floor that ascends more gradually creates gentler, broader waves. Offshore winds (that blow from the land out to sea) result in more uniform waves that break in clean lines. Onshore winds (that blow from the sea towards land) result in messy waves that break unevenly.

When a wave breaks, the water washing up the beach is called the **swash** and the water running back down the beach is called the **backwash**. **Constructive waves** are where the swash is stronger than the backwash, depositing sediment on the beach. **Destructive waves** are where the backwash is stronger than the swash, removing sediment from the beach.

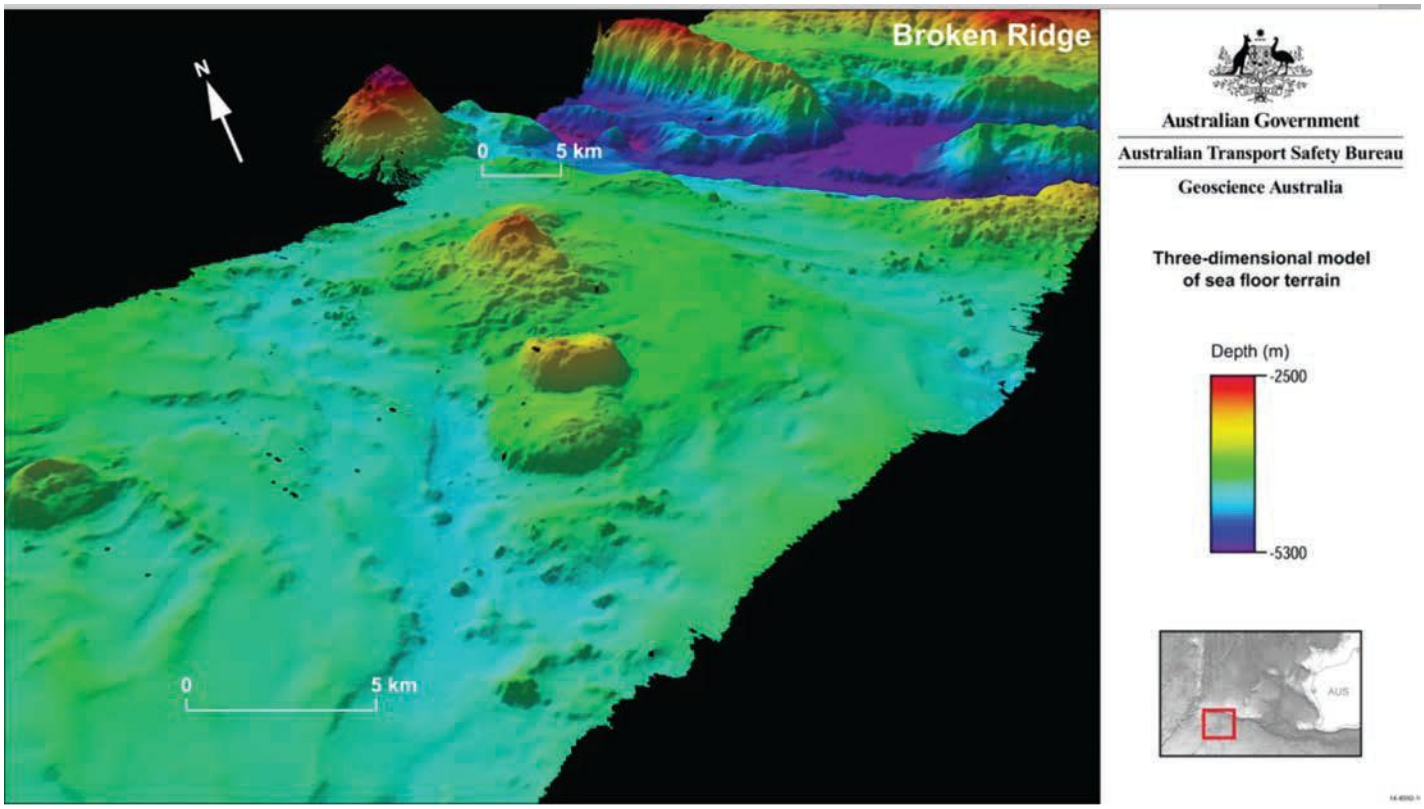
bathymetry the shape of the sea floor

swash water from a breaking wave washing up the beach

backwash water from a breaking wave running back down the beach

constructive waves a wave where the swash is stronger than the backwash, depositing sediment and other materials on the beach

destructive waves a wave where the backwash is stronger than the swash, removing sediment and other material from the beach

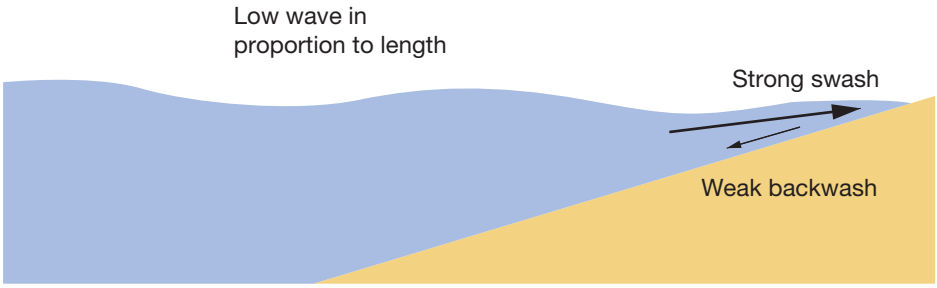


▲ **Figure 4.37** Bathymetry map of a section of the Indian Ocean

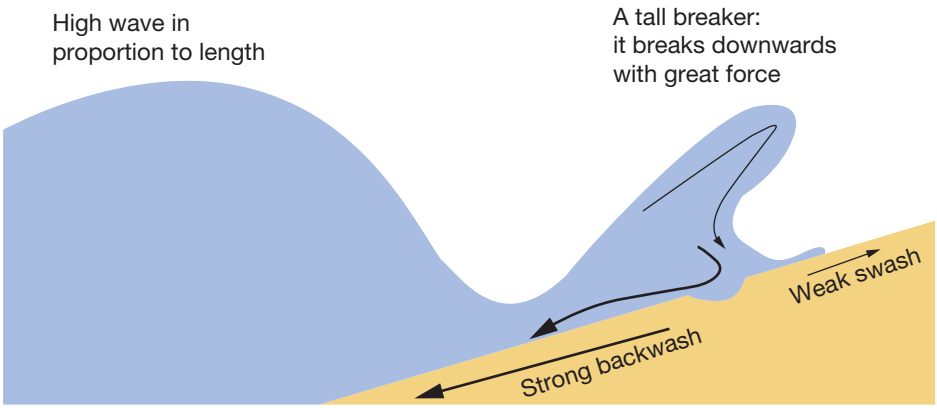
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▲ **Figure 4.38** Constructive waves



▲ **Figure 4.39** Destructive waves

ACTIVITY 4.7

Waves on a beach

Divide the class into two groups. One group is to devise a role-play acting out the process of a constructive wave breaking on a beach; the other group does the same for a destructive wave.

Landforms created by coastal erosion

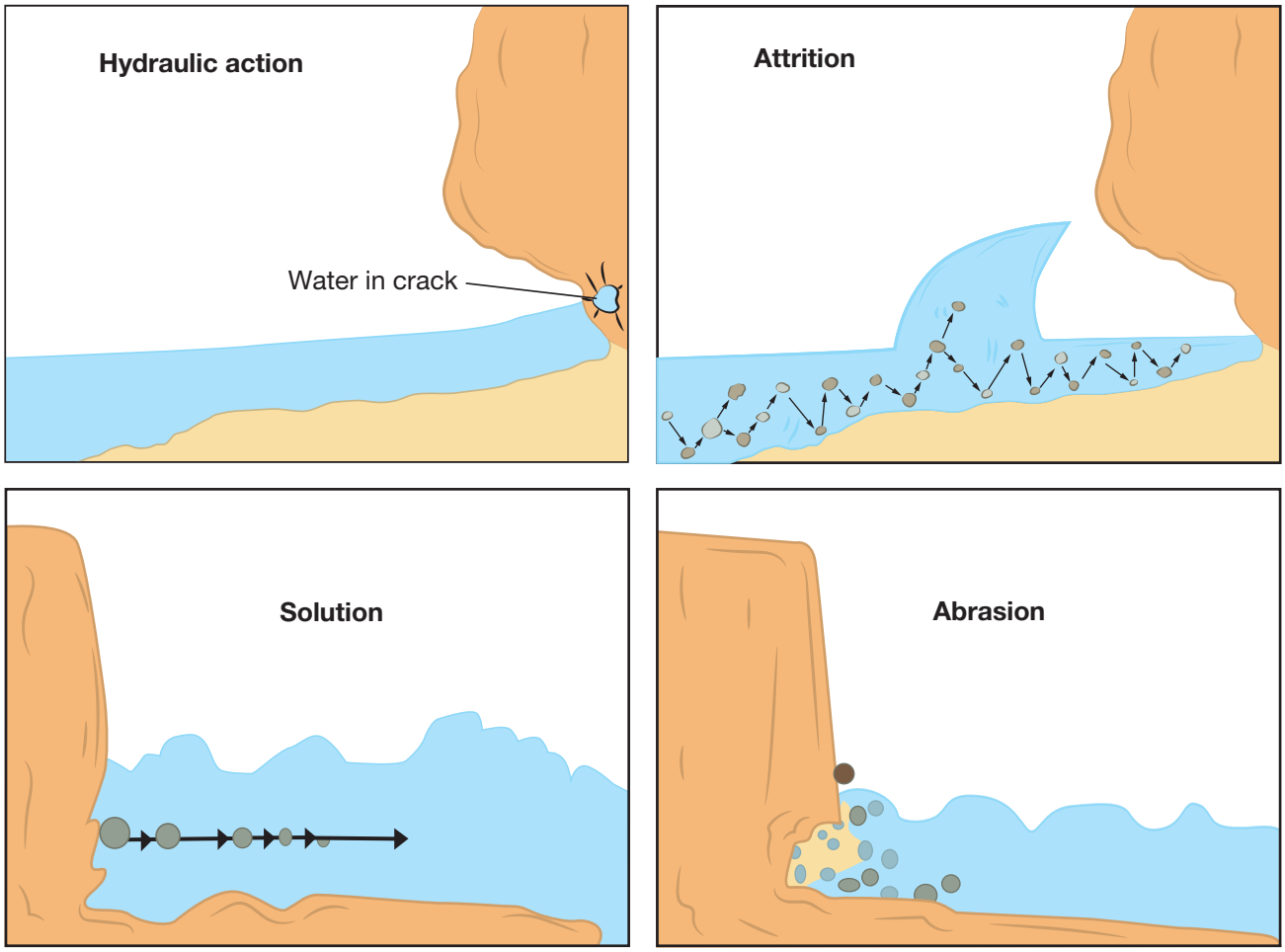
coastal erosion the wearing away of sediment and rocks from the shoreline

The action of destructive waves breaking on the coastline is the main cause of **coastal erosion** – the wearing away of sediment and rocks from the shoreline. This can occur rapidly, such as when wild waves created by a storm remove sand from a beach, or over a period of hundreds or thousands of years, such as the wearing away and gradual landward retreat of a cliff-face coast.

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The processes causing coastal erosion include:

- **Hydraulic action** – the process of waves compressing air within gaps in the rock, and this air being explosively released when the waves retreat, causing the rock to break
- **Attrition** – where the action of waves causes rocks or pebbles to bump against one another, breaking them apart
- **Solution** – when the acid in seawater erodes rocks such as limestone or chalk
- **Abrasion** – where sediment or rock carried by a breaking wave rubs against a rocky shore or headland, creating a sandpaper effect, wearing away the landform.



▲ **Figure 4.40** Processes of erosion on coastlines

The landforms found on rocky coastlines are created by these processes, often in a series of steps. For example, erosion of a weakness or crack on a headland forms a cave; further erosion creates an arch; the arch collapses leaving a stack; the stack wears down into a stump.

ACTIVITY 4.8

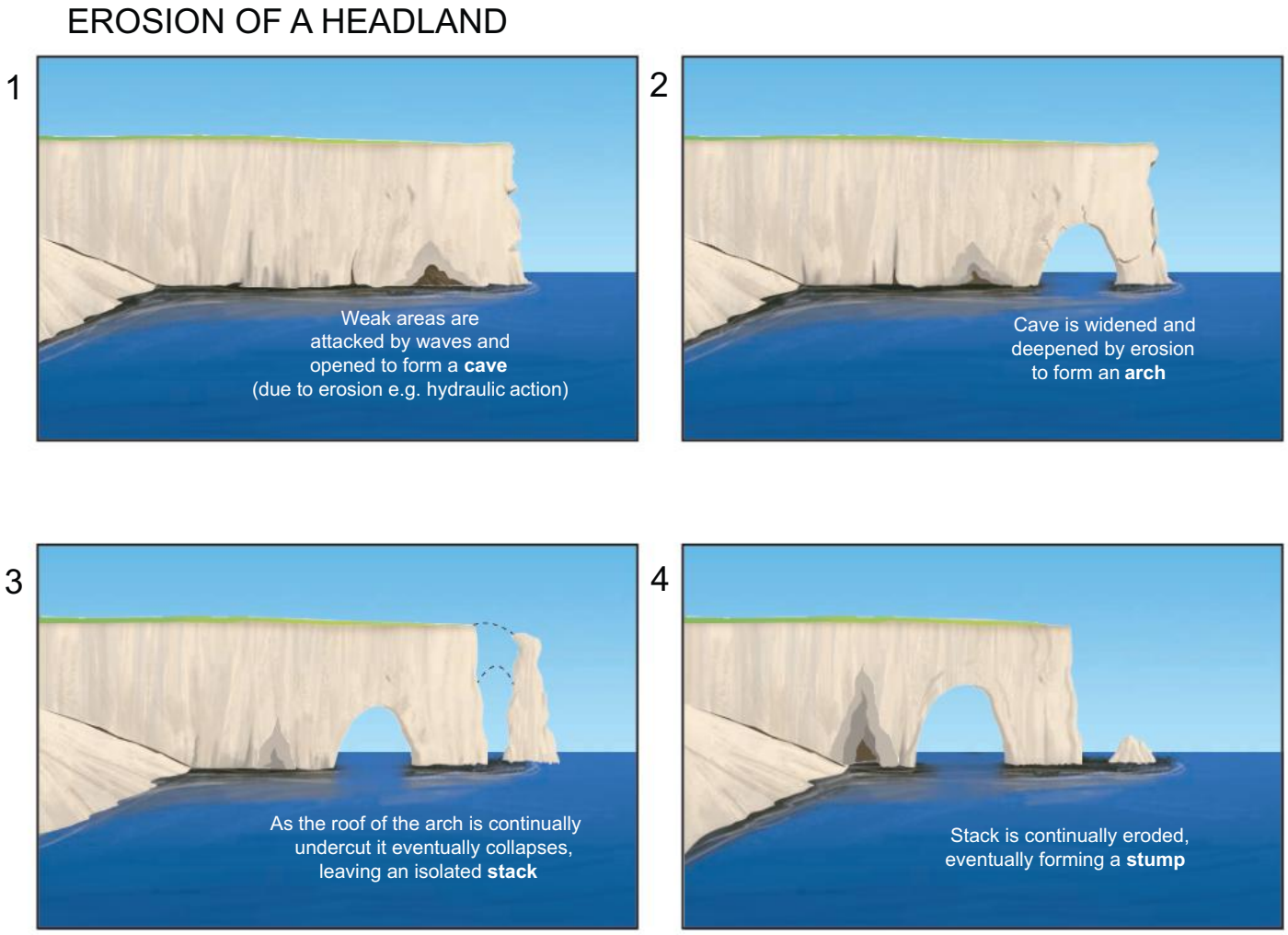
The erosion process

Using Figures 4.41 and 4.42, **describe** the erosion process of a cliff retreating to form caves, arches and stacks.

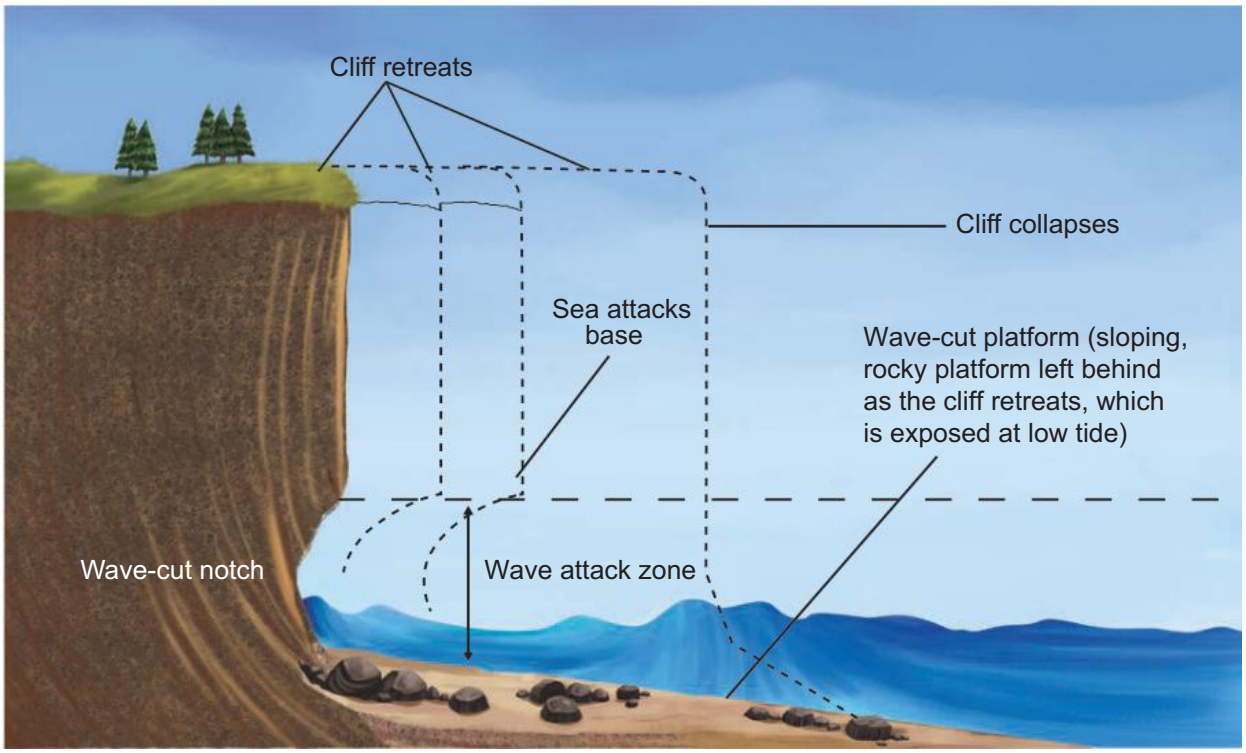
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▲ **Figure 4.41** The steps in erosion creating a stack



▲ **Figure 4.42** The process of erosion creating a wave-cut platform and cliffs

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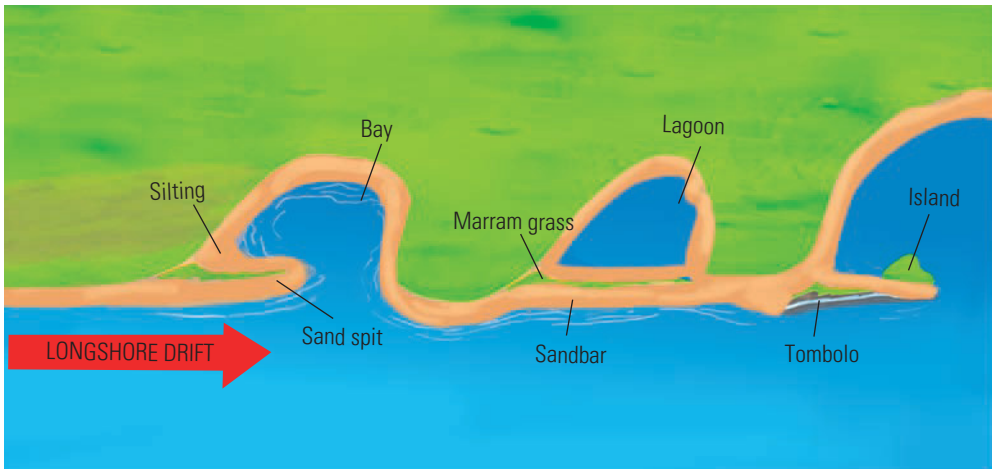
▲ **Figure 4.43** Aerial view of Loch Ard Gorge and the surrounding coastline on Victoria's Great Ocean Road. How many landforms created by erosion can you identify in the photo?

Landforms created by coastal deposition

Coastal deposition is the process where an agent of erosion – wind or water – loses energy and drops (or deposits) the rock fragments or sediment it is transporting. This could be a river depositing sediment where it enters the sea, or constructive waves depositing material on a beach. The swash of a constructive wave is more powerful than the backwash, meaning that material carried up onto the beach by the swash is not removed by the weaker backwash, and remains there, often creating new landforms.

coastal deposition the process where an agent of erosion – wind or water – loses energy and deposits the rock fragments or sediment it is transporting

A number of factors create constructive waves. These include where a coastline is protected by a landform such as a headland or sandbar, where the sea floor (bathymetry) is gently sloping, or where the strong winds creating destructive waves have lost energy and calmed.



▲ **Figure 4.44** Formation of spits and tombolos

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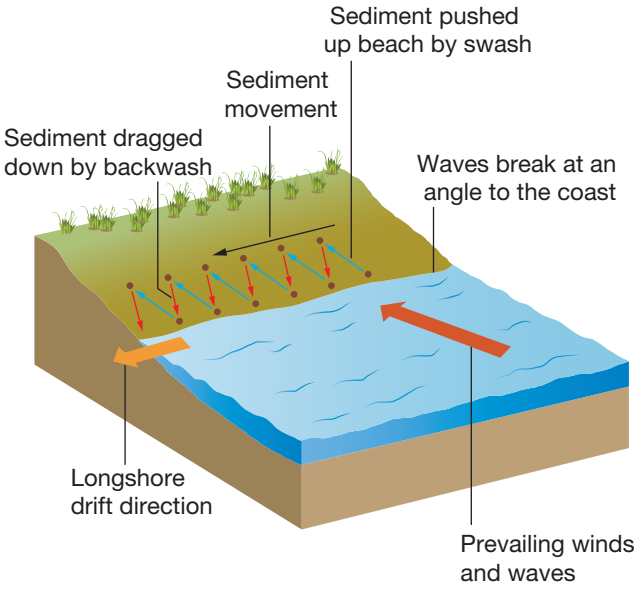
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prevailing winds the usual direction the wind blows in a particular location

longshore drift the movement of sediment, usually sand, shingle or mud, along a coastline driven by the direction of the prevailing wind

The direction of **prevailing winds** often results in waves approaching a beach at an angle, with the swash running up the beach at the angle and the backwash running straight back down. The repetition of this action can move sediment along a beach in a zig-zag pattern known as **longshore drift**. The process of longshore drift creates landforms such as:

- **Spits**: a stretch of sand or rock extending from a beach out into the sea
- **Tombolos**: a spit or bar that joins an island to the mainland
- **Sandbars**: a sand bank at the mouth of a river, forming an inlet or joining two headlands across a bay. The water that pools behind a sandbar is known as a lagoon. (Note that a lagoon can also be incompletely separated from the sea by spits, see Figure 4.34.)



► **Figure 4.45** The process of longshore drift moving sand along a beach



► **Figure 4.46** Farewell Spit, New Zealand

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Sediment is transported along coastlines through the process of longshore drift. Waves usually approach the beach at an angle to the shore. When they retreat, they move directly away from it. In this process, the waves often carry some sediment away from the beach, then upon approach they deposit this sediment further up the coastline. Along the east coast of Australia, longshore drift often carries sediment in a north-westerly direction. This deposition creates constructive landforms such as beaches, spits, sandbars and tombolos.



▲ **Figure 4.47** Natural arch and stack in the chalk cliffs at Étretat, in Normandy, France



ACTIVITY 4.9

Comparative field sketches

Refer back to the instructions on how to draw a field sketch at the beginning of this chapter (Activity 4.2). Using Figures 4.48 and 4.49 draw two field sketches and then **identify** and **explain** the changes that have taken place in the mouth of the Pumicestone Passage as a result of the Bribie Island breakthrough event as a result of Cyclone Seth in late 2021.

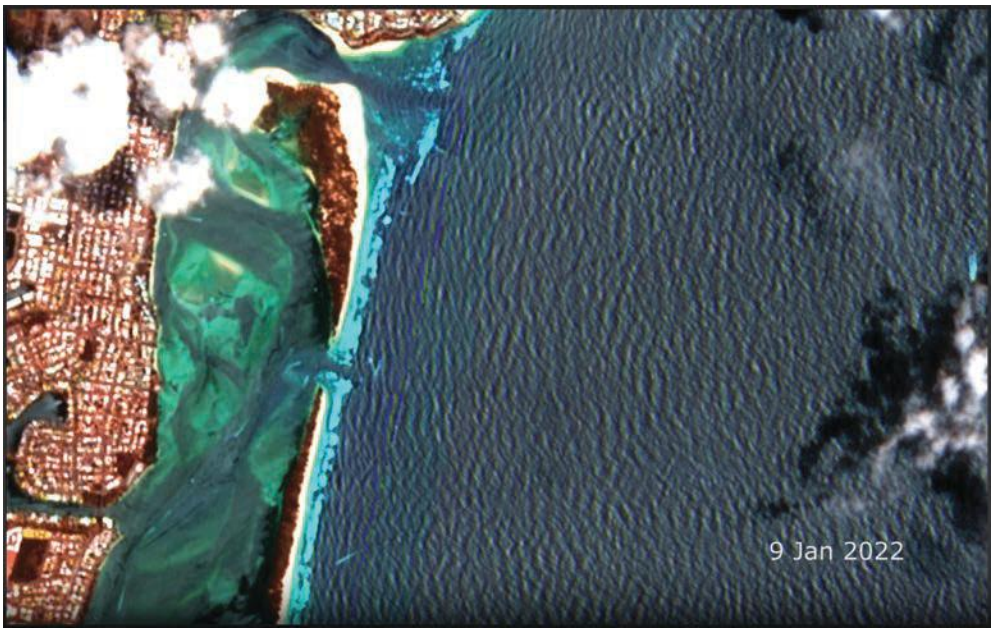
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▲ **Figure 4.48** The mouth of the Pumicestone Passage on the Sunshine Coast, Queensland at low tide (looking north) before Cyclone Seth



▲ **Figure 4.49** The mouth of the Pumicestone Passage on the Sunshine Coast, Queensland at low tide (looking north) after Cyclone Seth. In late 2021, waves caused by Cyclone Seth carved a channel through the northern end of Bribie Island. The sandbanks you can see to the north of the new channel were once the main boating entrance to Pumicestone Passage.

Dune systems

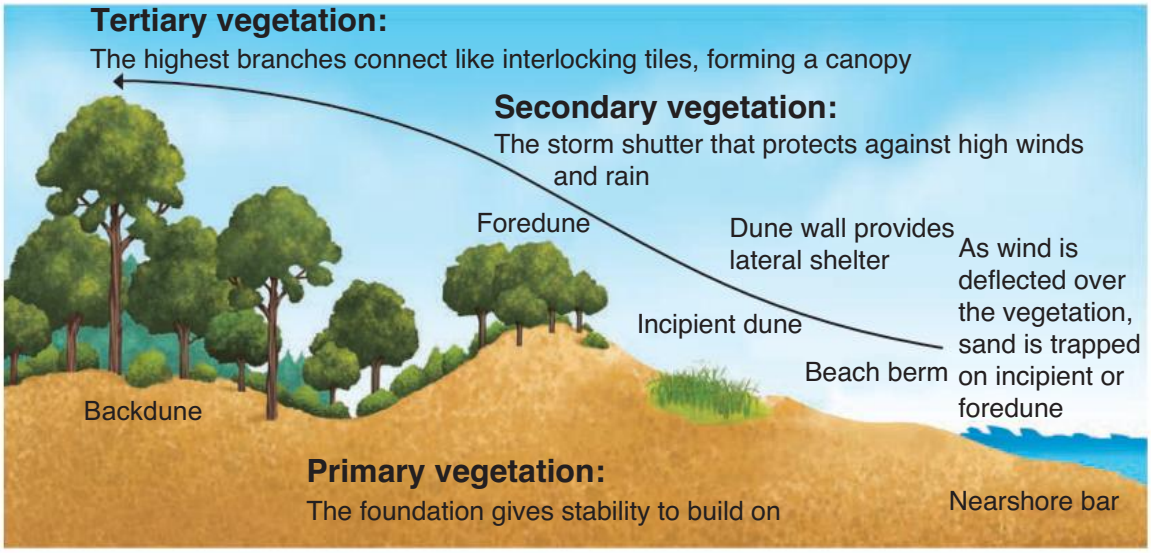
Sand dunes are formed when sand deposited on a beach by constructive waves is transported by wind and trapped by plants, driftwood or other obstacles. As sand accumulates and is stabilised by plants, a dune is formed. The smaller dunes closest to the beach and usually covered in grasses, such as spinifex, are known as foredunes.

Larger dunes behind the foredunes are called backdunes and may be covered with shrubs or small trees. Over time, vegetation grows on the dune systems. This protects the land behind it from damage. Vegetation that is closer to the shoreline, such as spinifex, is low in height and drought-resistant. The further back from the coastline, the taller and more dense the vegetation becomes.

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▲ **Figure 4.50** Aerial view of sand dunes on Moreton Island, Queensland



▲ **Figure 4.51** Dune systems are protected by vegetation.

CASE STUDY 4.4

How long is a spit?



▲ **Figure 4.52** A Syvash lagoon on the shores of the Arabat Spit, Ukraine. The strange pink colour is caused by algae and salt in the water.

Cape Bowling Green, Australia's longest spit, extends for more than 14 kilometres, and is up to a kilometre wide in places. Located 20 kilometres north of the town of Ayr in northern Queensland, the spit separates the waters of Bowling Green Bay from the Coral Sea. For more than 4000 years, prevailing currents and longshore drift have transported sediment from the mouth of the huge Burdekin River northwards along the coastline, creating the spit. Although impressive, Cape Bowling Green's length is only a fraction of that of the world's longest spit. Known as the Arabat Arrow, the Arabat Spit in Ukraine stretches for 112 kilometres and is up to 8 kilometres wide, separating the Sea of Azov from a series of lagoons called the Syvash. Despite its size, Arabat is the younger of the two spits, formed by deposition over the last 1000 years.

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ACTIVITY 4.10
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Using spatial technology to annotate an image

1 Using Google Earth, search for Cape Bowling Green.
2 Zoom in and use the tilt function (the arrows pointed up, down, left and right) to explore the topography of the area.
3 Annotate key geography processes such as longshore drift, sand deposition, dune systems, prevailing wind direction, and vegetation on the spit.
4 You can do this by adding place marks (click on the push pin), polygons and lines to mark the processes you observe.
5 When you have finished your annotations, click on 'Save Image'. This will give you additional options.
6 Give your image a title, update the legend by clicking on it and 'update from view'. This will include all of the features you have marked.
7 Make sure your image includes all elements of BOLTSS (Video 4.2 is a guide on using BOLTSS in Geography). You can check this by selecting the map options button.
8 When complete, click on 'Save Image'.

▲ **Video 4.2** BOLTSS

DEVELOPING YOUR UNDERSTANDING 4.1

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** what is meant by a 'geomorphic process'. List at least one example in your answer.
2 **Identify** and **describe** the two types of weathering and give an example of each.
3 **Explain** how the wind creates waves.
4 **Identify** the three factors that determine the power of a wave.
5 **Explain** the difference between swash and backwash.
6 **Describe** and **explain** coastal erosion and **identify** three landforms created by this process.

Interpret

7 **Describe** and **explain** coastal deposition and **identify** three landforms created by this process.
8 **Explain** the difference between constructive and destructive waves. In your answer refer to swash and backwash.
9 **Describe** and **explain**, using a diagram, how (you may search for 'before and after' photos online):
   a the natural rock bridge 'London Bridge' in Victoria collapsed in 1990
   b the rock stack that was part of the 'Twelve Apostles' collapsed in 2005.

Argue

10 Refer to the photos of the Pumicestone Passage and Bribie Island (see Figures 4.48 and 4.49). How do you think this area should be managed?
11 Look at the photograph of Wave Rock (Figure 4.28). Using the information about weathering and erosion you have learned in this section, draw a diagram to hypothesise about how this feature was formed. How many years do you believe it would have taken for the process of erosion to shape this landform?
12 Throughout human history, many deltas have been places where humans have lived. Using the processes of weathering and erosion, **explain** why humans have chosen to live in these locations.

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4

4.2 Where are Australia's distinctive landscapes and significant landforms found?

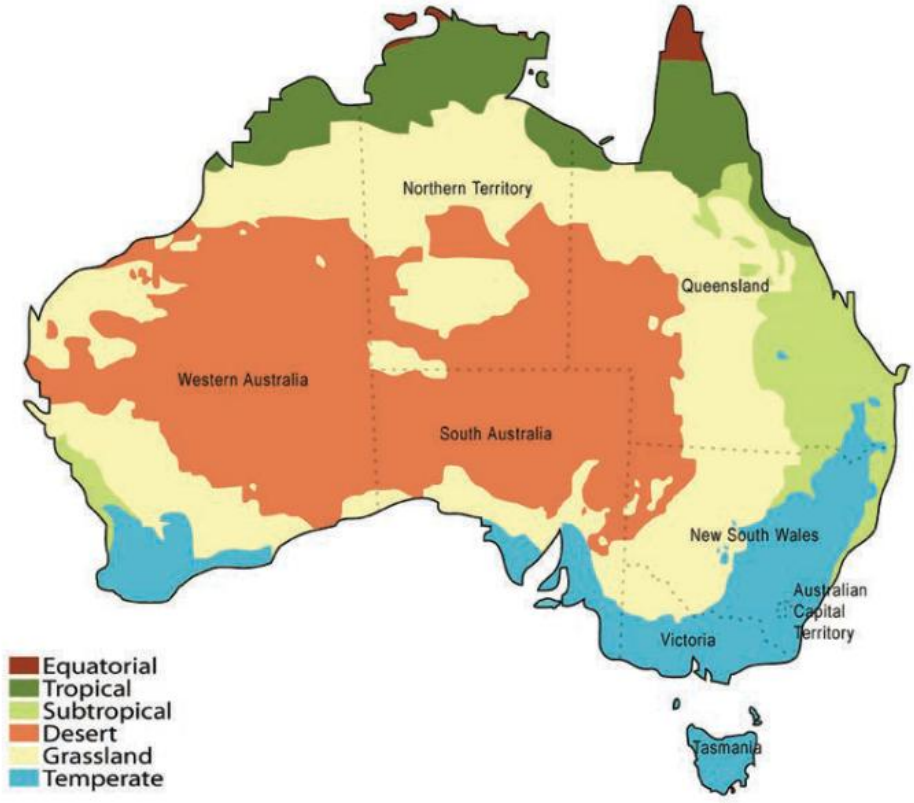
FOCUS QUESTION

What are some of the characteristics of a distinctive landscape or significant landform?

When we think about landscapes in Geography, we are using the concept of place. Places are parts of the Earth's surface that people identify and give meaning to. The ways that people and cultural groups perceive, experience and value places vary. In describing the features of landscapes, we often talk about the tangible features of a place such as deserts or rainforests.

Natural landscapes

On the Australian continent, there are diverse landscapes that are shaped by the various climates in which they are found. The characteristics of each place is unique and so problems that appear alike may require different strategies despite the similarities of environmental or social processes that exist in diverse places. Across the continent, most of the key types of landscapes described by geographers can be found. While the continent of Australia has alpine regions, it does not contain any polar landscapes.



▲ **Figure 4.53** Map of Australia showing the range and diversity of landscapes across the continent

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The National Landscapes Program is a Federal Government initiative that is designed to promote tourism of Australia's diverse landscapes. It has identified 16 regions that offer unique Australian natural and cultural experiences.



▲ **Figure 4.54** Map showing the range and diversity of Australia's National Landscapes Program

ACTIVITY 4.11
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Relative location

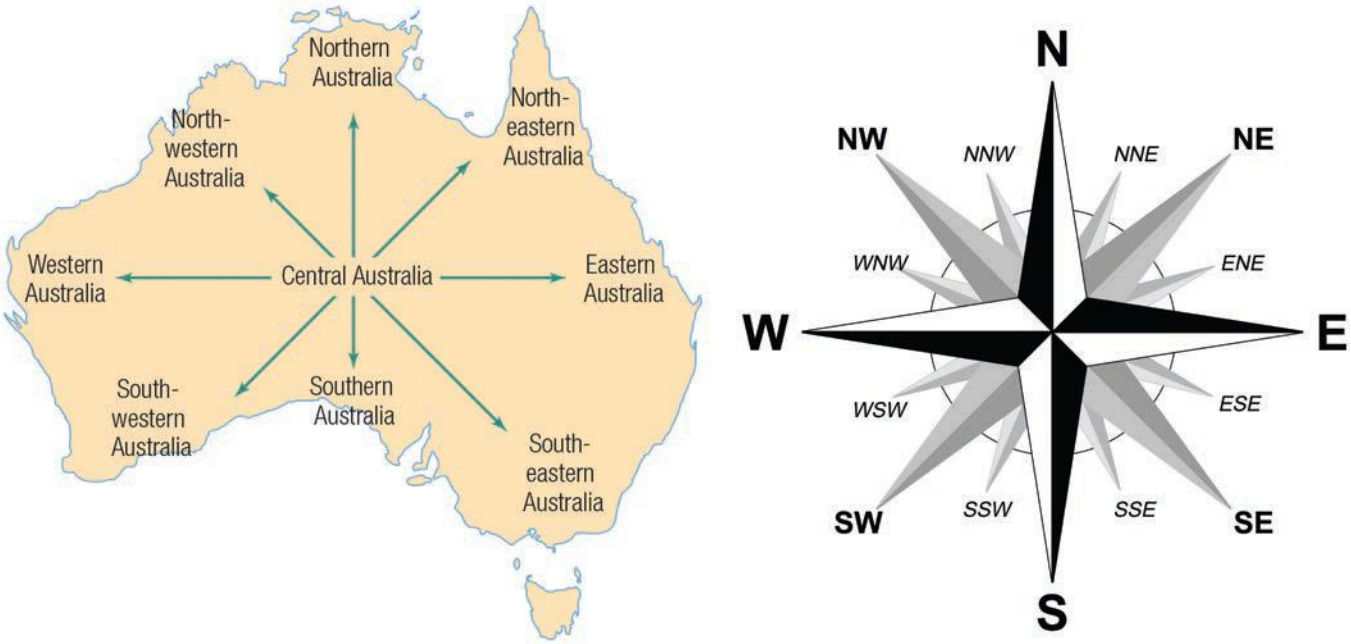
relative location description of where a place or object is in terms of distance and direction from another object

One of the pivotal questions asked by geographers is, 'Where is it?' Every feature that makes up and exists on the Earth's surface has a unique and specific location, which can be conveyed in a number of ways. Distance and direction from other features and places is a primary example of how locations can be expressed. This is known as **relative location**. Direction is crucial because, together with

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distance, it creates an understanding of where a place is in relation to others. Direction can be given in terms of points of a compass, or in bearing. The cardinal points of the compass are referred to as north, south, east and west. The points that provide a more specific analysis of direction are known as intermediate points, for example, northeast and southwest.

Geographers use both cardinal and intermediate points to define the direction of a specific place in relation to another. Maps will most often have an arrow indicating north to further aid such understandings. Most maps are designed with the intention of north aligning with the top of the map, so that one set of grid lines would rule as north–south. The direction arrow on a map will often be located near the legend for further clarification.



▲ **Figure 4.55** Compass points can be used to describe and locate regions in Australia.

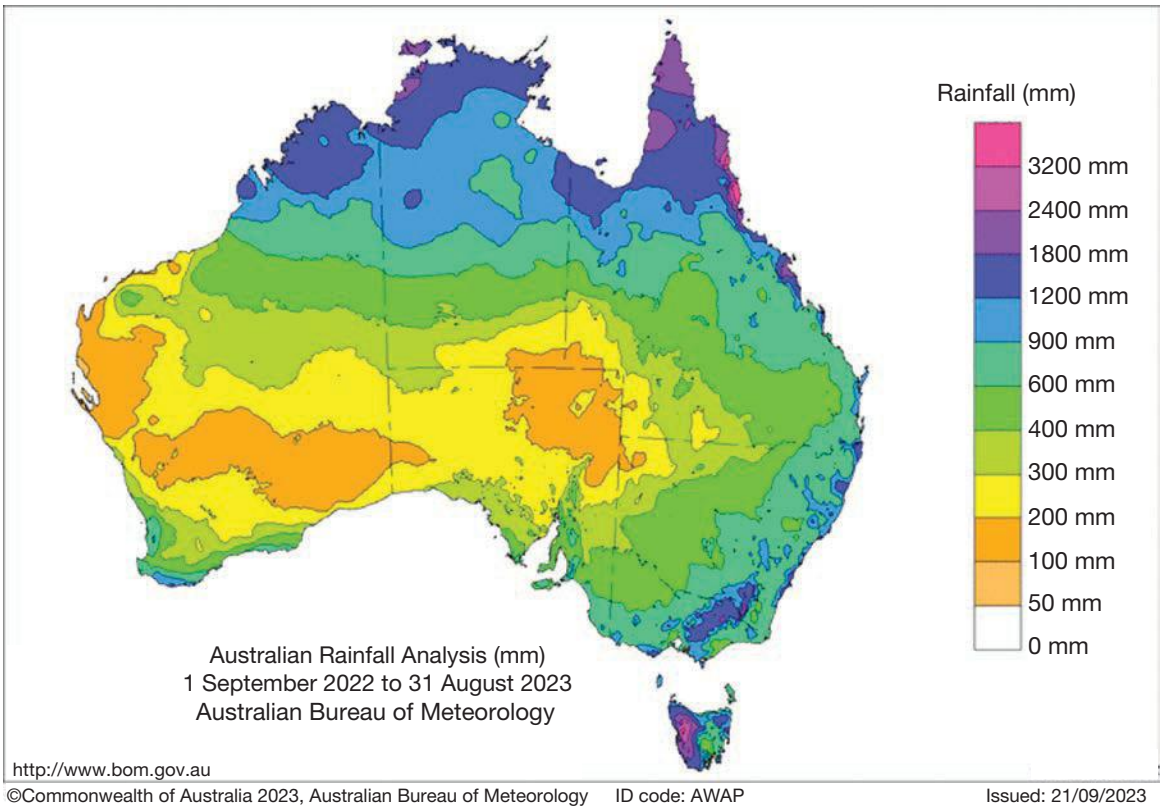
ACTIVITY 4.12

Relation markers

1 **Use** the relative location markers provided by Figure 4.55 to **describe** the relative location of 8 Australian National Landscapes (Figure 4.54). **Conduct** research online to **identify** one significant place or landform that is a feature of each of your chosen National Landscape.

2 **Compare** the average rainfall of Figure 4.56 (average rainfall map, 2018–2019) with the map showing the range of natural landscapes across the continent (Figure 4.53). Can you **identify** reasons as to why these natural landscapes exist in these locations?

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▲ **Figure 4.56** An average rainfall map for Australia for the period September 2022 – August 2023

Deserts in Australia

You would have noticed in Figure 4.56 that there is very low average rainfall across Australia, especially in central, western and south-western Australia. These areas have the characteristics of a desert landscape.

There are 10 desert landscapes found across Australia. While deserts are usually described as a region that receives less than 250 mm of rain each year, sometimes Australia's deserts receive more due to weather events. Other characteristics of a desert region include low humidity and an overall moisture deficit. Around 18 per cent of the Australian continent is classified as desert. However, many of the areas surrounding the deserts are also predominantly arid and so these landscapes are very similar to the designated desert landscapes. These additional areas mean that around 35 per cent of Australia is regarded as a desert landscape. The deserts in mainland Australia are arid, with temperatures that can exceed 35°C during summer and nighttime temperatures as low as –7°C during winter.

Approximately 3 million square kilometres of Australia is a desert landscape. Desert landscapes contain desert grass or mountainous landscapes. Although desert landscapes in Australia are now largely uninhabited, First Nations peoples have successfully lived in these

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▲ **Figure 4.57** Map showing the location of the 10 Australian deserts

landscapes for tens of thousands of years. As we learn to 'think geographically' about deserts in Australia we need to remember that the idea of 'wilderness' as a place that has had little to no human occupation is a very European concept. First Nations peoples have successfully lived in these landscapes for tens of thousands of years. Throughout that time, they have worked with desert landscapes encouraging the proliferation of certain plants and ecosystems through the application of cultural burning and management of water sources. A feature of the Australian desert country are the many sand dunes. The most famous of these dunes is 'Big Red' located just outside of Birdsville in western Queensland on the lands of the Wangkangurru Yarluyandi peoples – a favourite destination for many 4WD enthusiasts.



◄ **Figure 4.58** 4 wheel driving on 'Big Red'. The sand dune west of Birdsville in Central West Queensland is on the edge of the Simpson Desert and a popular challenge for 4WD enthusiasts.

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CASE STUDY 4.5

An iconic Australian National Landscape: The Horizontal Falls (Garaanngaddim), Western Australia

An iconic landscape (natural or cultural) is one that is famous or well-known because of its beauty, uniqueness or significance to people.

Talbot Bay's (Ganbadba's) Horizontal Falls in Western Australia's Kimberley region is a unique natural phenomenon that has become a major tourist attraction. Located 220 kilometres northwest of Broome, the falls feature a wall of water up to 4 metres high cascading through a narrow **gorge**, creating a spectacular sight. Despite the name, this is not technically a waterfall, where water drops due to gravity, but rather from a tidal event. As the huge tides in the Lalang-garram (Horizontal Falls) marine park ebb and flow, water builds up at the gap faster than it can pass through the 10- to 20-metre-wide gorge, forcing the water up and creating the effect of a waterfall.

gorge a valley, cleft or deep vertical indentation between cliffs



▲ **Figure 4.59** The Horizontal Falls in Western Australia's Kimberley region. What features of the landform would create the 'falls'?

ACTIVITY 4.13
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Using spatial technology to examine the terrain of landforms



▲ **Figure 4.60** A Google Earth satellite image showing the 3D terrain of the location

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1 Open Google Earth.
2 Search for Horizontal Falls (Western Australia).
3 Zoom in and use the tilt function (the arrows pointed up, down, left and right) to explore the topography of the area.
4 **Explore** the area.
5 **Describe** the terrain of the area.
6 Zoom out so you can see Darwin, in the Northern Territory, on the screen as well.
7 Using the measuring tool (the button looks like a ruler), measure the distance between Horizontal Falls and Darwin.
8 **Describe** the relative location (distance and direction) of Horizontal Falls from Darwin.

Cultural landscapes

Many landscapes in Australia contain cultural and spiritual meanings given to a place by First Nations peoples. These intangible characteristics are also important features of how to understand the geographical concept of place.

One such place is the Budj Bim Cultural Landscape in south-west Victoria on Gunditjmara Country. This landscape was placed on the World Heritage List in 2019. It is the first Australian landscape to be given World Heritage status purely for its cultural values. Other famous First Nations sites such as Uluru-Kata Tjuta and Kakadu landscapes were listed for both natural and cultural features.

The Budj Bim Cultural Landscape is a series of channels, weirs and dams, built by the Gunditjmara people to trap eels for food, that combine to create one of the world's oldest aquaculture systems. Archaeologists have found that the system is up to 6600 years old. It is a World Heritage site because of the continued cultural practices and oral knowledge systems within the landscape, that Gunditjmara people have passed down since Deep Time. For many Gunditjmara people, this includes how the ancestral beings formed the landscape and continue to live in the landscape as expressed through Dreaming knowledge.



◄ **Figure 4.61** The Tae Rak channel and holding pond created by the Gunditjmara people forms part of the Budj Bim Cultural Landscape

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Another well known landscape is the Uluru-Kata Tjuta landscape in central Australia. Unlike the Budj Bim landscape, this landscape is both natural and cultural. The Uluru-Kata Tjuta National Park was originally recognised as a World Heritage site 1987 for its geology, rare plants and animals, and natural beauty. In 1994, UNESCO also added the cultural relationship that the Anangu people have with the landscape to its World Heritage listing.

The Uluru-Kata Tjuta region in central Australia is one of 10 desert landscapes found across the continent and is found in the 'Red Centre' National Landscape (see Figure 4.54). The 'Red Centre' contains two significant Australian landforms: Uluru and the Kata Tjuta sandstone rock formations.



▲ **Figure 4.62** The spectacular Kata Tjuta sandstone rock formations, in Uluru-Kata Tjuta National Park, Northern Territory

The rock of Uluru and Kata Tjuta are of two different types. Uluru rock is a coarse-grained sandstone, the sediment of which was eroded from largely granite mountains. Kata Tjuta rock is more gravel-like, containing pebbles and boulders cemented together by sand and mud.

Both Uluru and Kata Tjuta are the visible tips of rock which extends deep into the Earth. Geologists think that these rocks may extend down as far as 6 kilometres. These two landforms were made when, between 300–900 million years ago, a depression in the earth's crust (the Amadeus Basin) received many layers of sediment. At around 550 million years ago, the area was crumpled and buckled. The resulting mountains were eroded over time as large amounts of sediment were washed away in rain events. Around 350 million years ago, the rocks were folded and fractured which raised the area above sea level.

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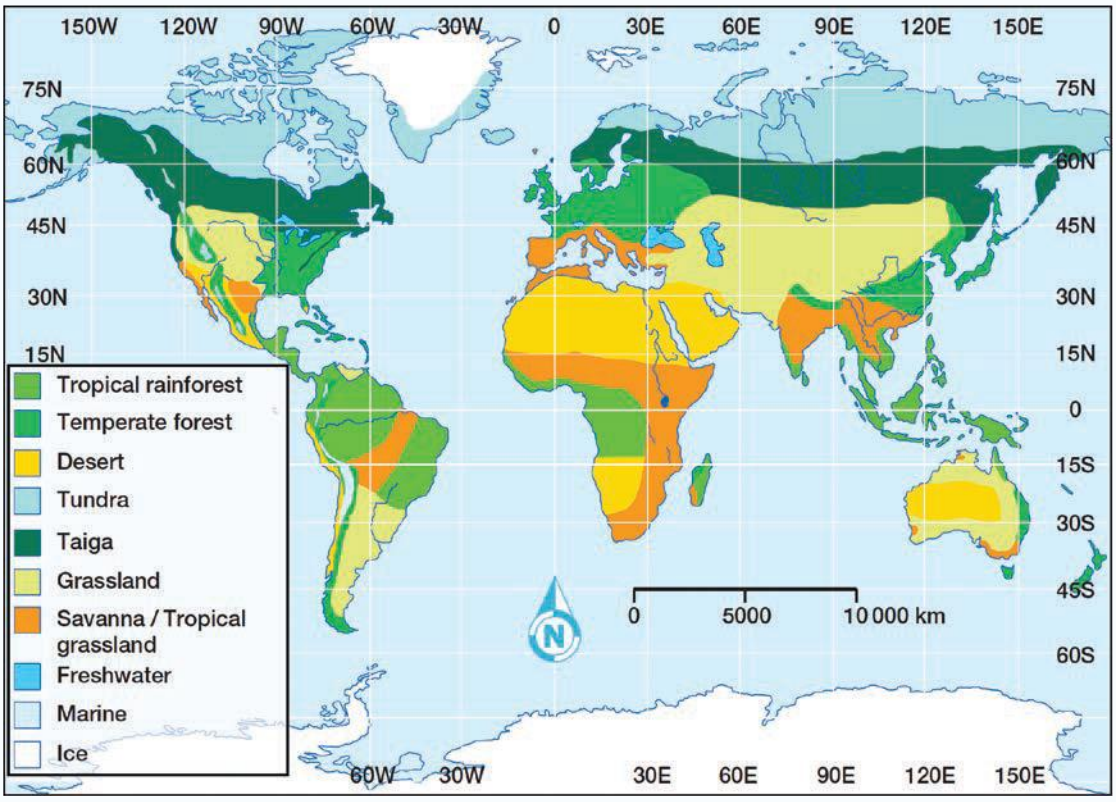
When the First Peoples arrived in the area over 30 000 years ago, the region of the Red Centre looked much the same as it does today. For the First Peoples, this landscape is sacred, with several associated Dreaming stories. One Pitjantjatjara narrative tells of the great snake king Wanambi, who was thought to live at the top of Kata Tjuta, only coming down during the dry season. People who did evil things would be punished by Wanambi, who could turn a breeze into a cyclone with his breath. For the Anangu people, Kata Tjuta is sacred. Since 1995, the Anangu people have been able to reinstate their ancient cultural ceremonies after a period of being prevented from doing so.

CASE STUDY 4.6

Comparing a significant Australian landscape with a global landscape: the grasslands of Arnhem Land with the grasslands of Mongolia

Grasslands are iconic landscapes of endless grass containing a few scattered trees. They contain a rich biodiversity of species and are a key source of food for many animals.

Around the world, grasslands cover approximately 30 per cent of the land. They are usually found between wetter landscapes such as forests and the drier environments of deserts. Grasslands vary in climate, landform, soil and altitude, according to their global location. They are also called different names around the world. In the United States they are called 'prairies', 'pampas' in South America, 'steppes' in Asia and in Australia, we refer to them as 'rangelands' or by the term that is also used in Africa, 'savannas'.

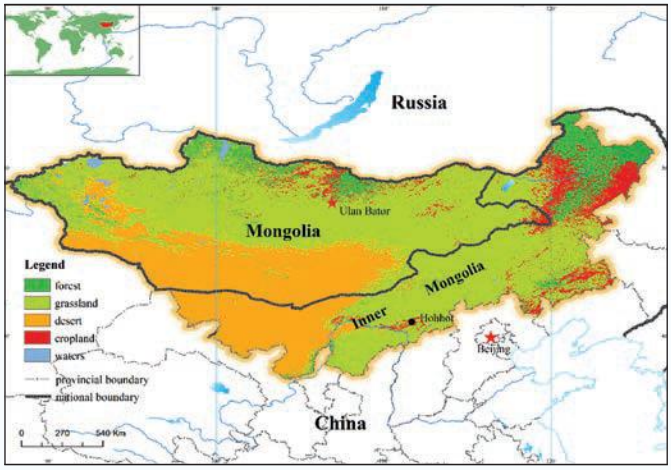


▲ **Figure 4.63** Map showing the various global climate biomes

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Mongolian steppes (grasslands)

In Central Asia, the vast temperate grassland is known at the Eurasian Steppe and is an iconic landscape of the country of Mongolia. The iconic tropical savanna grasslands of Australia are found in Arnhem Land in the Northern Territory, in the National Landscape region described as 'Australia's Timeless North' (see Figure 4.54).



▲ **Figure 4.64** Map showing the various biomes of Mongolia

The grasslands of Mongolia can be found across nearly 900 000 square kilometres, which is approximately 80 per cent of the country. Mongolians have maintained a nomadic lifestyle on the steppes for thousands of years. The most famous Mongolian was the thirteenth-century warrior Genghis Khan, who conquered the region with an army of expert horsemen.

Even though Mongolia is in a temperate climate zone, the climate is semi-arid with very cold winters and short, but hot summers. Mongolia is known as the 'Land of the Eternal Blue Sky' because around two-thirds of the year are sunny days with very little **precipitation**.



▲ **Figure 4.65** The Mongolian grasslands of the eastern Eurasian Steppe

A type of grass called 'feather grass' is found all over the Mongolian grasslands. These plants have adapted over millions of years to the extreme changes in temperature and precipitation on the steppes. The grasslands support a variety of animals including foxes, wolves and pheasants. The traditional lifestyle of semi-nomadic herders is supported through the grazing of horses, goats, cattle, yaks and camels. The grasslands provide a diversity of goods and services for Mongolia and while the general productivity is low for a landscape in a dry or cold region, when there is precipitation, there is a small increase.

In more recent times, nomadic lifestyles have been threatened by a triple threat of climate change, agriculture and settlements. Many Mongolians have chosen to live in small brick homes or high-rise apartments instead of a nomadic pastoral lifestyle in **yurts**.

Humans have used the Steppe for agriculture, mining and urban environments. Overgrazing and mining has led to land and environmental degradation. Social changes have also seen traditional herders forcibly removed from traditional pastures.

precipitation the preferred scientific term used to describe the rain, snow, sleet or hail that falls to or condenses on the ground

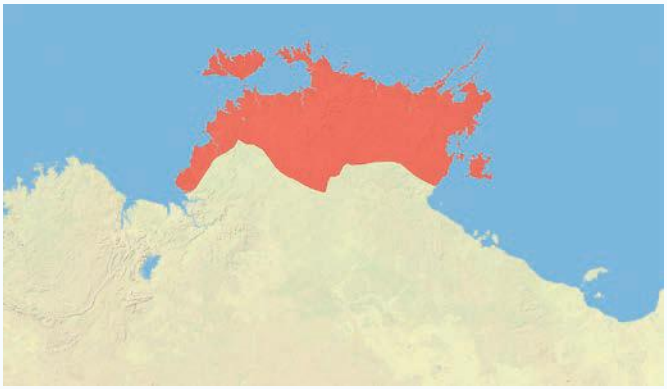
yurt a round tent-like shelter that can be assembled in under an hour to allow for easy movement of nomadic herders across the grasslands several times a year. It is loaded onto a cart when not assembled.

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Arnhem Land savanna

The Arnhem Land savanna is a tropical and subtropical grassland and shrubland region in the Northern Territory.

The savanna is surrounded on three sides by water with the Timor Sea (northwest), the Arafura Sea (north) and the Gulf of Carpentaria to the east. The landscape also includes the Tiwi Islands, Wessel Islands and Groote Eylandt.



▲ **Figure 4.66** Map of showing the location of the Arnhem Land tropical savanna in the Northern Territory, Australia

There are several different First Nations peoples located in the Arnhem Land region. The Yolngu people are in north-east Arnhem Land and have maintained a strong cultural presence and connection with country. The Yolngu people call this area Miwatj. The Maung people are found on the Goulburn Islands and the Bininj people are located in West Arnhem Land. The group of language dialects spoken in the region are known as Bininj Kunwok and sub-groups of the Bininj people are known by the various dialects which are spoken.



▲ **Figure 4.67** Australian tropical savanna. Note the open canopy with the grassland undergrowth.

The climate is tropical with seasonal precipitation falling during a wet summer season and a mainly dry season from April to October. Vegetation is mainly an open canopy of woodland consisting of eucalyptus trees around 20 metres high. There is an understorey of tall grass that can grow up to 2.5 metres high. The wet season encourages abundant growth of the grassy understorey, making this landscape one of the most fire-prone on Earth. For thousands of years, First Nations peoples have successfully managed this fire-prone landscape through the use of cultural burning practices.

The savannas are home to a large number of plant and animal species with some 2000–3000 identified species across the ecoregion. Scientists have classified more than 400 species of birds and 100 different mammals. There are also numerous moths, butterflies, ants, termites and spiders, many of which have not yet been adequately studied by contemporary scientists.

There has been a notable decline in seed-eating birds such as the Gouldian finch and in many native mammal species, especially in the Kakadu National Park.

The tropical savannas face numerous environmental threats including weeds such as gamba grass that encourage the spread of fire. These were originally planted for introduced cattle by pastoralists, but are now contributing to increased bushfire events. Other challenges from mining and forestry as well as other introduced species such as feral donkeys, horses and cats are placing further pressures on an already stressed environment.

This area is a living landscape with many First Nations peoples' stories and knowledge embedded in the ancient knowledges of the region. The Yolŋu culture of East Arnhem Land is one of the oldest living cultures on Earth. The paintings, dances, and songs of the Yolŋu record the earliest histories of the region, telling the Dreaming stories of how the creation ancestors brought lands, waters, people, animals and plants into being. In the Yolŋu world, people own areas of land and water in common, but the relationship is more complex than just 'owning'. Yolŋu often talk about coming from the land, which means that they believe in having a spiritual and cultural relationship with the landscape and a responsibility to care for it.

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ACTIVITY 4.14

Grasslands

1 **Describe** a grassland landscape.
   - **a** What are the similarities between the Mongolian Steppe and the Australian tropical savanna? What are the differences?
   - **b** Draw a Venn diagram that identifies both the similarities and differences between the two regions.

2 Why is grass important to both animals and nomadic herders?

3 Search for videos to **compare** and contrast how humans have adapted to living in the grasslands regions:
   - **a** Naadam, a traditional Mongolian festival at https://www.youtube.com/watch?v=RI67liJxJtQ
   - **b** If you **conduct** a search online for 'Savannah Way', you will find a number of videos describing life in the tropical savanna of Australia
   - **c** **Investigate** the culture of the Yolŋu people. How do the spiritual and cultural beliefs of Yolŋu shape the way they interact with the landscape?

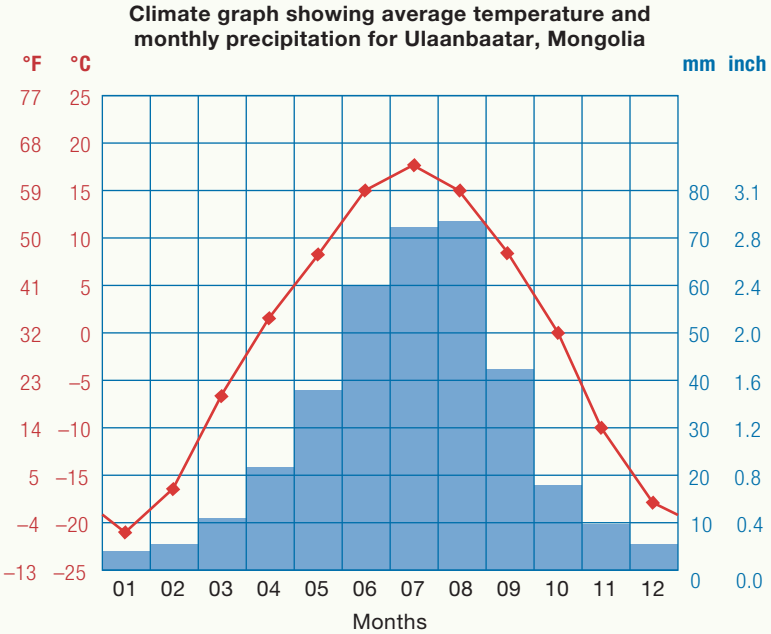
4 What are some of the challenges faced in managing the future of grasslands in Mongolia and Australia sustainably?

5 Research the food web of a grassland landscape. Choose either the Australian tropical savanna or the Mongolian steppe and draw a food web of your chosen grassland.

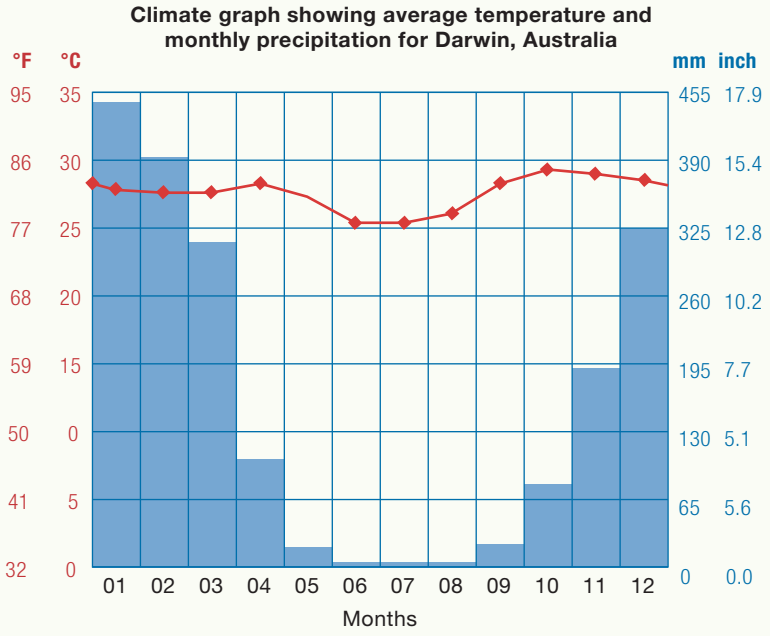
6 **Investigate** the environmental problems of the grassland landscapes of Mongolia and Australia. In ways do they face similar issues? How are they different? What type of sustainable strategies for the management of these landscapes could be implemented?

ACTIVITY 4.15
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Using climate graphs to understand a landscape



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▲ **Figure 4.68** Climate graphs showing the average temperature and monthly precipitation of Ulaanbaatar, Mongolia (bottom left, previous page); Darwin, Australia (above)

A climate graph shows us the annual temperature and precipitation statistics for a particular location. On the left-hand side of the chart, the temperature is measured and indicated by a moving average shown as a line graph across the year. Some graphs show an average minimum and maximum temperature. The graphs above only show an average temperature. The right-hand side of the chart shows the amount of precipitation in millimetres. This is shown as an average monthly result in the form of an annualised bar graph. By tradition, rainfall is shown in blue and temperature is shown in red.

1 Using the information in the climate graphs above, **describe** the pattern of annual temperature for a) Ulaanbaatar and b) Darwin.
2 Using the information in the climate graphs above, **compare** the pattern of annual precipitation for a) Ulaanbaatar and b) Darwin. Are they similar or different?
3 The temperature and precipitation patterns tend to mirror each other in Mongolia. Can you provide any reasons for why this might be the case?
4 **Describe** what the weather would be like to live in Darwin and the tropical savanna in a) July and b) January. What would do you think would be the key difference(s) in your experience?

ACTIVITY 4.16
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Constructing a climate graph

Climate graphs are constructed from data collected by **meteorologists**. To construct a climate graph follow the steps below:

meteorologist scientist who studies and predicts atmospheric conditions

1 Select a data source. You can usually find climate data on various world climate websites.
2 Transfer the temperature and rainfall data into a table similar to the one for Canberra (Table 4.1).
3 Use the information provided for the wettest month and the months with the highest and lowest temperatures to define your scale for both temperature and precipitation. Put the temperature scale on the left-hand axis and the precipitation (in mm) on the right-hand side.

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4 Plot the rainfall figures and colour the columns blue.
5 Plot the temperature data, ensuring that each dot is in the centre of each month. Join the dots using a red pen or pencil with a smooth, red curve. If you plotting a minimum and maximum temperature, do the same for each but use a red color for the maximum temperature line and a blue colour for the minimum temperature line.
6 Don't forget to include a heading of the place being graphed with its latitude, longitude and elevation.

▼ **Table 4.1** Climate data for Canberra, Australia (Latitude 35° 17' 00" S, Longitude 149° 04' 41" E; elevation 571 metres)

Month	J	F	M	A	M	J	J	A	S	O	N	D	Year
Average minimum temperature (°C)	28.5	28.1	24.7	20.1	15.8	12.3	11.5	13.5	16.2	19.6	23.5	26.5	Av. 20.0
Average maximum temperature (°C)	13.5	13.8	11.5	7.0	4.2	1.4	0.0	1.3	4.0	6.7	9.7	11.9	Av. 7.1
Rainfall (mm)	59.8	51.2	55.6	49.3	47.5	37.9	52.4	47.6	65.2	61.9	58.7	46.1	Total 632.6

DEVELOPING YOUR UNDERSTANDING 4.2

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** the difference between a cultural and natural landscape. Is it possible for a landscape to be both cultural and natural? Why?
2 **Identify** three significant landforms studied in this section.
3 **Identify** three Australian deserts. **Conduct** research into one of them to **describe** its features.
4 **Describe** how cultural identity is shaped by the landscape in which people live, as discussed in this section.

Interpret

5 **Describe** the cultural and natural features of one place that you are familiar with that is significant to you.
6 **Research** a National Landscape (Figure 4.54):
   a **Explain** why this landscape was identified as a 'National Landscape'.
   b **Identify** a significant landform found in this National Landscape. Why is it significant?
   c **Create** and annotate a diagram outlining the process that shaped one of the landforms.

Argue

7 **Discuss** the advantages or disadvantages of learning about landscapes as both cultural *and* natural geographical phenomena.

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4

4.3 Why do people, including First Nations peoples, attribute various meanings and values to diverse landscapes and landforms?

FOCUS QUESTIONS

- How are landscapes significant for different peoples?
- How do First Nations Dreaming stories give meaning and connection to Country and place?

Apart from their importance as a source of natural resources, as discussed in the previous section, landscapes are significant to different people in many ways. Geographers use the concept of **place** to describe the value or meaning given to a location by humans. This meaning varies for different people; for example, to you, your house may be your home, a place you share with your family; for a real estate agent, your house may simply be an asset that can be bought and sold. This section investigates the main ways that specific places – landscapes – are significant and are given meaning by different peoples.



▲ **Figure 4.69** A Yirrganydji woman explains how Aboriginal peoples use the fruit and seeds found in the rainforests of Queensland's tropical north.

Cultural

Landscapes and landforms shape and are represented in different **cultures** in many ways. The identity of national groups often reflects the landscapes where they are located. For example, the Sherpas of Nepal are known as a 'mountain people', the Tuareg of the Sahara as a 'desert people', and the Marsh Arabs of Iraq are named after the landscape they inhabit. Landscapes also gain significance after featuring in art and popular culture. The viaduct of Glenfinnan became known as the 'Harry Potter viaduct' after the Hogwarts Express crossed the bridge as it passed through the lochs and mountains of the landscape of the Scottish Highlands in several of the films. For many indigenous groups, landscapes and particular landforms are the basis of their spiritual beliefs. For example, First Nations peoples of Australia use the stories of the Dreaming to explain the creation of the landscapes and landforms of their Country. For Amazonians, each plant and animal in the rainforest contains its own spirit.

place an area that has a specific meaning or purpose

culture the customs, behaviours and beliefs that characterise a particular society

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▲ **Figure 4.70** Aerial view of Marsh Arab reed house village in Southern Iraq

Aesthetic and recreation

Many landforms are significant for their beauty or aesthetic appeal. Many iconic landscapes are renowned for their spectacular or unique features. However, beauty is subjective, and landscapes may be attractive to a person or people due to their connections to a place, such as where they were raised, have lived or holidayed. Scenic landscapes are also often the most popular and significant locations for recreation, whether that is for adventure activities, such as rock climbing, hiking and mountain biking, or more leisurely pursuits such as picnicking or tourist drives.

CASE STUDY 4.7

Mount Fuji

Japan's cultural history and national identity are embedded in the spiritual beliefs that have formed around and are based on Mt Fuji, a unique cultural symbol of the Japanese people.

Regarded as one of the best examples of a dormant shield volcano in the world, each year over 200 000 people undertake the trek to climb to the summit. Many are tourists, and on a clear day you can see all the way to Tokyo, 100 kilometres away. But there are also those who come to Mt Fuji for spiritual purposes.

While many cultures have held mountains to be sacred, the Japanese reverence for Fuji is notable. It is regarded as a stairway to heaven, separating earth and sky with its beautiful symmetry. For many Japanese people, it is a place of pilgrimage, for receiving spiritual insight or the dwelling place of gods and ancestors.

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The mountain has held an important place in the spiritual beliefs of those who follow Shinto, the traditional ancestor religion of Japan, for Buddhists and for the indigenous Ainu people of Japan. For the Ainu, the sun was one of the most important gods and to see the sunrise on the first day of the year from the base of Mt Fuji was considered a sacred act. At the base of the mountain today are more than 2000 sects and denominations from the practitioners of Shinto, Buddhism, Confucianism and mountain-worshipping Fumi-ko.

Artists have long tried to capture the spiritual essence of the mountain. A poet, 1300 years ago, described Mt Fuji as a 'living god' where fire and snow are forever in combat. Matsuo Basho, a poet in the seventeenth century, compared people's feeble attempts to harness the wind with the timeless power of the mountain:

> The wind from Mount Fuji
>
> I put it on the fan
>
> Here, the souvenir from Edo

▲ **Figure 4.72** Matsuo Basho's famous haiku comparing Mt Fuji with the wind. Edo is the traditional Japanese name for the modern city of Tokyo.



▲ **Figure 4.71** Mount Fuji, the tallest mountain in Japan, is a sacred place to the Japanese people.

The woodblock artist Katsushika Hokusai began a series called *Thirty-Six Views of Mount Fuji* when he was 70 years old, comparing the stately permanence of Mt Fuji with the busy-ness of daily life. The mountain is depicted as being the centre of the universe, around which all life flows.



▲ **Figure 4.73** *The Great Wave off Kanagawa*, the most famous print in Katsushika Hokusai's paintings of Mt Fuji. Note how the mountain rises strong and immovable from the midst of the waves caused by the storm.

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The power of the mountain is such that those who lived near it were inspired to write folk tales to explain the perfect imagery of Fuji. Even though many Japanese myths take place in the imaginary realm, many mention the mountain specifically. One such folk tale is the *Tale of the Bamboo Cutter*, written around 1000 years ago. The story tells of a princess from the Moon who is discovered inside a glowing bamboo plant. Her beauty attracts men who want to marry her, all of whom she rejects. She eventually attracts the attention of the Emperor of Japan, then reveals her origins and returns to the Moon. The story is a tale of love and immortality. It is thought that the Japanese word for immortality is the origin of the name of Mt Fuji.

While it was once revered from a distance, today Mt Fuji is a popular destination for tourists and spiritual pilgrims alike.

ACTIVITY 4.17

Check your understanding

1. **Identify** three ways that humans value significant landscapes.
2. **Identify** the different ways that Mt Fuji has been revered in Japanese culture.
3. **Reflect on** your own life and the different ways that humans value landscapes in the question above. Can you **identify** any ways in which you might practice these values in your own life?
4. **Explain** using the source material provided in Case study 4.7 on Mt Fuji why this mountain has attained such an important place in Japanese society.
5. 'To understand our Earth it is not enough just know about geomorphological processes.' **Discuss** this statement, taking into consideration the social, environmental and economic impacts understanding a landscape.

Djab Wurrung sacred trees

Members of the Djab Wurrung nation, along with people from other First Nations and non-Indigenous people, had been camping west of Melbourne for around two years with the aim of protecting 260 sacred trees. Trees, known as 'birthing trees', some thought to be more than 800 years old, were under threat of being cut down to widen the Western Highway in Victoria. Many Djab Wurrung people believe that generations of babies were born in the hollows of the birthing trees.



▲ **Figure 4.74** One of the sacred trees identified by the Djab Wurrung nation as being under threat from the proposed highway.

An agreement had been reached with the State Government to protect 15 trees, when an additional tree known as a 'Directions Trees' was cut down and removed. This tree was considered culturally significant to many Djab Wurrung people and it loss caused anger and sadness.

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[Cutting down the trees] will destroy not just one particular tree, but many directions trees. After a birth, the father would have the placenta and the mother would have the seed from the bush tucker. They would go and plant a tree, which is called a directions tree. That tree would then represent that baby. And that baby would grow in conjunction with that tree. So, that's there for that child to go back to and reflect on their life … These trees have absorbed the blood of labouring women.

▲ **Figure 4.75** Zellanach Djab Mara from the Djab Wurrung Heritage Protection Embassy describes the place's significance.

They'd be nothing without each other. Standing this ground for so long and being with her would be like losing someone very close … a spouse.

▲ **Figure 4.76** Amanda Mahomet, a Djab Mara protestor explaining the cultural significance of the trees



ACTIVITY 4.18
RESPONDING TO THE SOURCES

Refer to Figures 4.75 and 4.76 to answer the following questions.

1 What is the 'placenta'? Biologically, why is the placenta important in the womb?
2 What is the symbolism of burying the placenta with a seed of the tree for a child?

These trees were also important because they are part of the Songlines of the Djab Mara people. Under colonisation, most of the landscape has been divided up for farms, roads and towns. There is very little of the landscape left that reflects the culture of the Djab Wurrung from pre-colonial days. These trees are one of the few remaining pre-colonial remnants of Country. Cutting down the 'Directions Tree' didn't just break hundreds of years of ancestral birthing cultural traditions, but also destroyed part of the ancient Songlines of the Djab Wurrung.

Our bodies are at one with the country, we can feel the chains of the chainsaw grinding through our souls, our spirits. The sounds of those chainsaws will haunt us forever and be added to the already existing intergenerational trauma shadowing our people. There are no words to describe the emptiness we as Djab Wurrung are feeling right now.

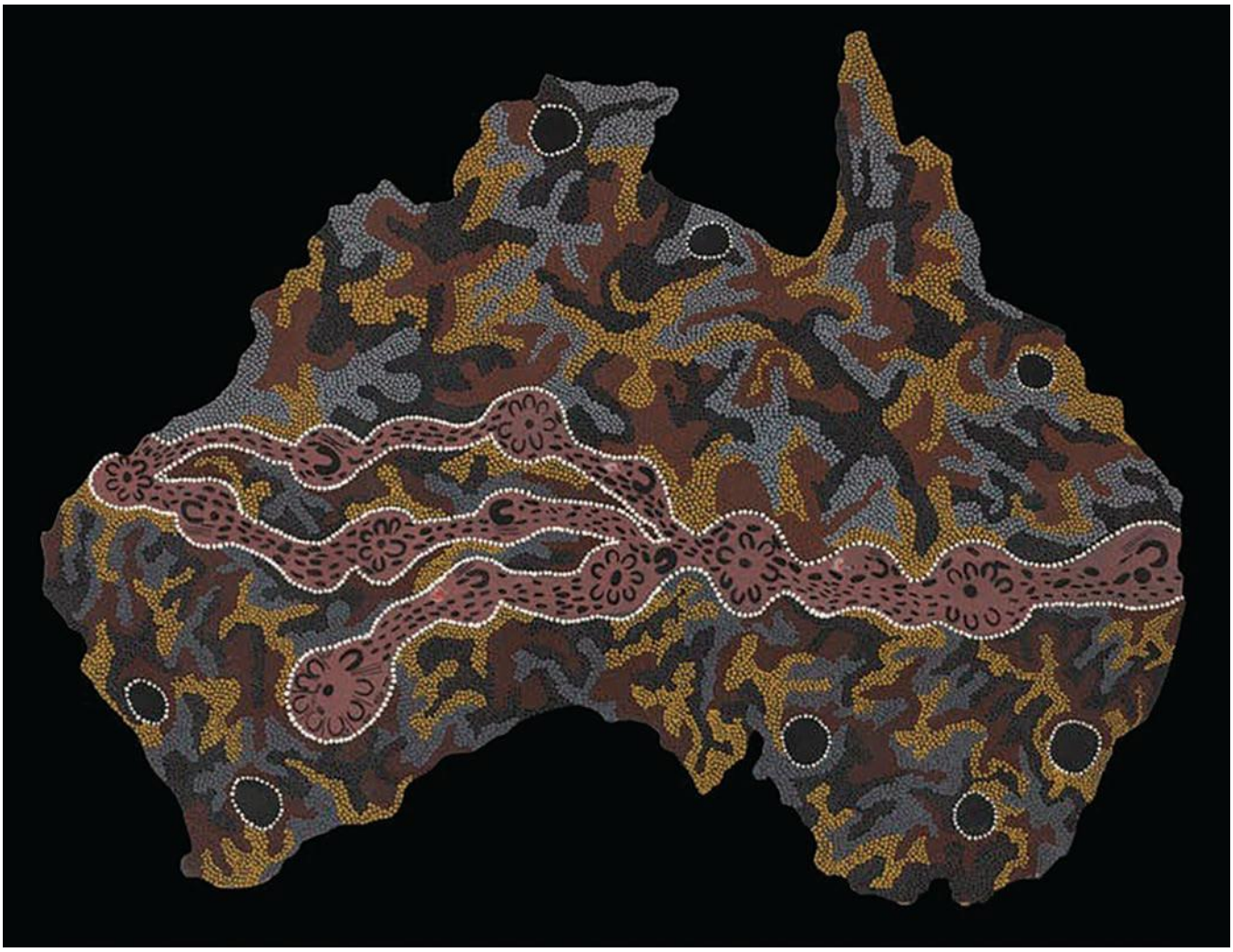
▲ **Figure 4.77** Sissy Eileen Austin, a Djab Wurrung woman and a member of the First Peoples' Assembly of Victoria.

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What are Songlines?

Songlines have been interwoven into First Nations cultures for over 65 000 years. They trace aspects of astronomy and geography told through ancient stories and describe how events of Dreaming have helped shape the landscape as we see it today. Many historians now recognise that the Songlines are an important part of how we tell the story of the past and present of Australia. For Aboriginal and Torres Strait Islander peoples, they are the story of the land.

Passed down by the Elders over many thousands of years, Songlines also describe routes across the landscape, many of which are now modern highways and roads across Australia. Famous highways such as the one across the Nullarbor between Perth and Adelaide, or between Darwin and the Kimberley, follow the paths of songlines.



▲ **Figure 4.78** Artwork representing the Seven Sisters Songline (1994) by Josephine Mick

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One famous narrative is the Songline of the Seven Sisters, a creation narrative that can be traced from Roeburn in the west of Australia, all the way across the continent to the east coast. It passes through many different lands and so the story is carried by the Martu, the Anangu, Pitjantjatjara, Yankunytjatjara and Ngaanyatjarra people. The Songline tells the story of seven sisters who are chased by Wati Nyiru (or Yurlu), an evil shape-shifting spirit, across the land and into the night sky. There the sisters become the Pleiades star cluster. One of the oldest stories ever told on the continent, it travels across three deserts connecting the edges of the land with the deserts of the Red Centre.

The National Museum of Australia and the Western Australian Museum have produced resources on the story of the seven sisters, including Video 4.3 which you can access using the QR code on this page. Explore these resources before undertaking Activity 4.19.

▲ **Video 4.3** The Seven Sisters, narrated by Shellie Morris



▲ **Figure 4.79** First Nations women displaying artwork depicting the Seven Sisters as part of the 'Tracking the Seven Sisters' museum exhibition.

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ACTIVITY 4.19
MAKING THINKING VISIBLE

See, think, wonder

Refer to Figure 4.79.

See

1 List three things you see in the image.
2 **Describe** the figures. Are there any features that stand out?

Think

3 Why are the Seven Sisters depicted in this way? Are these figures simply decorative or do you think that these features have a special meaning?
4 Review the narrative of the Songline of the Seven Sisters via the suggested museum websites and video. Recount the key events of the Seven Sisters Songline.
5 Who could you ask to find out more information?

Wonder

6 How can knowing the stories of ancient Songlines such as the Seven Sisters help us better understand the landscapes and landforms that exist across Australian and around the world?

DEVELOPING YOUR UNDERSTANDING 4.3

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** the meaning of 'place'.
2 **Explain** the importance of culture in shaping how we understand 'place'. **Use** specific examples to assist in your explanation.
3 **Identify** three specific ways that people place cultural meaning into landscapes.
4 **Reflect on** your life. Can you identify ways in which you, or your family and friends embed cultural, aesthetic and recreational meaning into landscapes? Provide examples.
5 **Describe** the importance of Songlines to First Nations peoples in Australia.

Interpret

6 **Explain** why Amanda Mahomet describes the loss of the 'grandfather' tree as like losing a spouse.
7 **Justify** the importance of culture on interpreting the significance of landscapes. **Use** evidence from this chapter.

Argue

8 Should the significance of trees to First Nations peoples prevent their removal for road projects? **Explain** your answer.

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4

4.4 In what ways do human activities manage and interact with the processes and forces that shape distinctive landscapes?

FOCUS QUESTION

How do the actions of humans impact different landscapes?

The Daintree Rainforest, situated in North Queensland is the largest rainforest in Australia and is home to many animal and plant species that are unique to the region, including the endangered cassowary. The Kuku Yalanji people have lived here for thousands of years and in 2021 gained Native Title and formal ownership over the Daintree Rainforest. Located about two hours by car north of Cairns, the rainforest itself is over 135 million years old, making it the oldest rainforest in the world.

In 1983, the local Douglas Shire Council and the Queensland Government tried to construct a road through the rainforest along the Bloomfield Track. Some locals saw this development as an opportunity in an area that lacked significant development. Others believed that the rainforest was worth preserving, especially as the road was planned to go through Cape Tribulation National Park.



▲ **Figure 4.80** The Daintree Rainforest is a unique rainforest landscape.

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Local protestors quickly gathered in November and initially brought a stop to construction. The small protests quickly grew into a full-blown environmental protest, known as 'The Daintree Blockade' that lasted a further 10 months. The protestors were unsuccessful in preventing a road being built through the rainforest as there is a partially sealed road today. But the energy and commitment of the initial campaign eventually led to success in saving the Daintree Rainforest as a World Heritage Area. Historians have identified that the events of the Daintree Blockade are a symbol of whether we should save natural forests such as the Wet Tropics or continue with traditional forestry practices. The general public asked 'Who were these people risking their lives for the forest? And what motivated them?'



ACTIVITY 4.20

Saving the Daintree Rainforest

Below are a variety of responses as to why activists chose to become involved in the initial campaign to save the Daintree Rainforest in December 1983

Activist 1:

Cape Tribulation is a really special place to a lot of people in Queensland. It is a wild place, an incredibly beautiful place.

Activist 2:

I, too, have learnt how special a place it is. Since arriving here nine years ago, I have come to realise that it was in a forest like this that we began. This forest has cared for me like a mother cares for her child, she has fed me and protected me, claimed and healed my physical and mental wounds, and has taught me many things, including tolerance and forgiveness.

Activist 3:

Where is the brotherhood we once shared with the trees? Where is the sanctity that we used to feel in the forests? Where is the respect for anything greater than ourselves? Forgotten in the plethora of images on millions of television screens. Expelled down the exhaust pipes of the swarms of motor cars that are apparently bent on colonising this planet. Submerged by the noise, frenetic pace and confusion of the concrete jungles through which we walk as strangers.

Activist 4:

The rainforests contain fully half of the 10 million species of plants and animals on earth – the very womb of life. The continued evolution of life on this planet depends on the survival of the genetic materials that these forests contain.

Activist 5:

The road will violate Aboriginal sacred sites. The Kuku Yalanji tribes have a number of sacred and cultural sites in the areas.



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Questions

1 **Construct** a mind map of the reasons given by the protestors on the previous page as to why they became involved in the first blockade of the Daintree in December 1983. **Identify** which activist provides you with this reason. For example, you might say 'Beauty of nature', Activist 1, or 'Scientific reasons', Activist 3 & 4. Provide a short quotation from the activist to support your reasons.

Landscapes and landforms are created and shaped not only by natural processes, but also by the actions of humans. These may enhance or protect an environment, but often cause **landscape degradation**, which is the changing of a landscape in an undesirable way. This includes reducing the value of a landscape as a resource, impacting on the aesthetic appeal or beauty of a landscape, or lessening the **biodiversity** – the range of plants and animals – found in a landscape. The impact of human activities on natural environments demonstrates the concept of **interconnection**. Landscape degradation relates closely to the concept of **sustainability**, the capacity of a landscape to be maintained for and used by future generations. The following section investigates human processes that cause landscape degradation: urbanisation and land-clearing, and use of resources.

landscape degradation the changing of a landscape in an undesirable way

biodiversity the number and types of plants and animals that exist in a particular area

interconnection the relationship between different features and how they are connected to each other (this can include the relationship between places and people, and the influences that these have on each other)

sustainability the capacity of a landscape to be maintained for, and used by, future generations

More than 40 per cent of the world's population live within 100 kilometres of the coast and more than 85 per cent of Australians live within 50 kilometres of the coastline. The huge number of humans living on or near the coast degrades and places pressure on the sustainability of coastal environments.



▲ **Figure 4.81** Built on what was once productive farmland, the northern suburb of Pimpama on the Gold Coast is one of the fastest growing suburbs in Australia. The urban sprawl between Brisbane and the Gold Coast has almost connected as the southern corridor grows, while suburbs such as Northlakes to the north of Brisbane are adding to the northern corridor of rapid urban development in Southeast Queensland.

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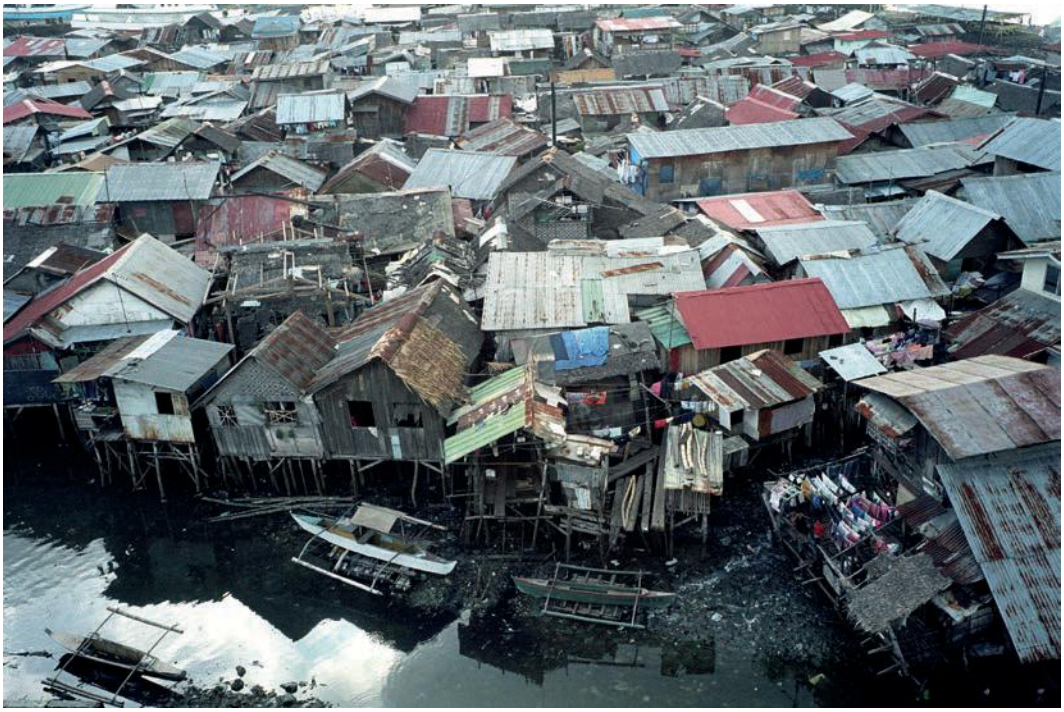
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Urbanisation

Urbanisation is the process of people moving from rural areas (the countryside) to towns and cities. On a global scale, this process accelerated rapidly in the second half of the twentieth century. In 1950, 30 per cent of the world's population lived in urban areas; by 2018 this figure had increased to 55 per cent. Similarly, in 1950 there were only two megacities (those with a population greater than 10 million), New York and Tokyo; by 2018 there were around 33. By 2050, it is expected that around 80 per cent of the global population will be living in urban landscapes.

The increase in size of the world's cities and number of people living in urban areas has many effects on coastal landscapes. The most obvious impact of urbanisation on landscapes is that as urban areas increase in size, they encroach on and replace other landscapes, whether they are human, such as farmland, or natural, such as forests or wetlands. For example, the Gold Coast in Queensland has changed considerably over the years. The original dune system has been gradually replaced, first by housing then by high-rise apartments and hotels to take advantage of the water views and the outdoor lifestyle.

Urbanisation also affects environmental sustainability. Expansion of urban areas not only results in the destruction of natural habitats, it also changes natural processes such as the flow of water. This can have undesirable effects such as flooding, erosion, and increased water and air pollution.



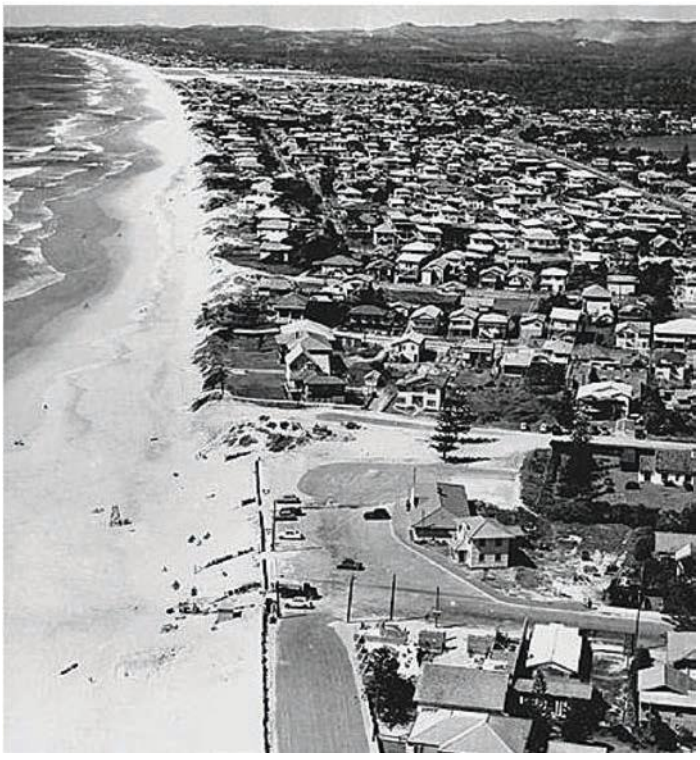
▲ **Figure 4.82** Cebu City slums, Philippines. Urbanisation and rapid population growth result in people living in temporary homes with little access to basic **infrastructure** such as clean water and sewerage.

infrastructure structures and services needed for society to operate properly, such as transport, water supply, health services, education systems, waste disposal systems and telecommunications

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▲ **Figure 4.83** Modern Surfers Paradise, developed with high-rise apartments and hotels



▲ **Figure 4.84** Aerial view from the beach end of Cavill Avenue looking south to Broadbeach, 1955

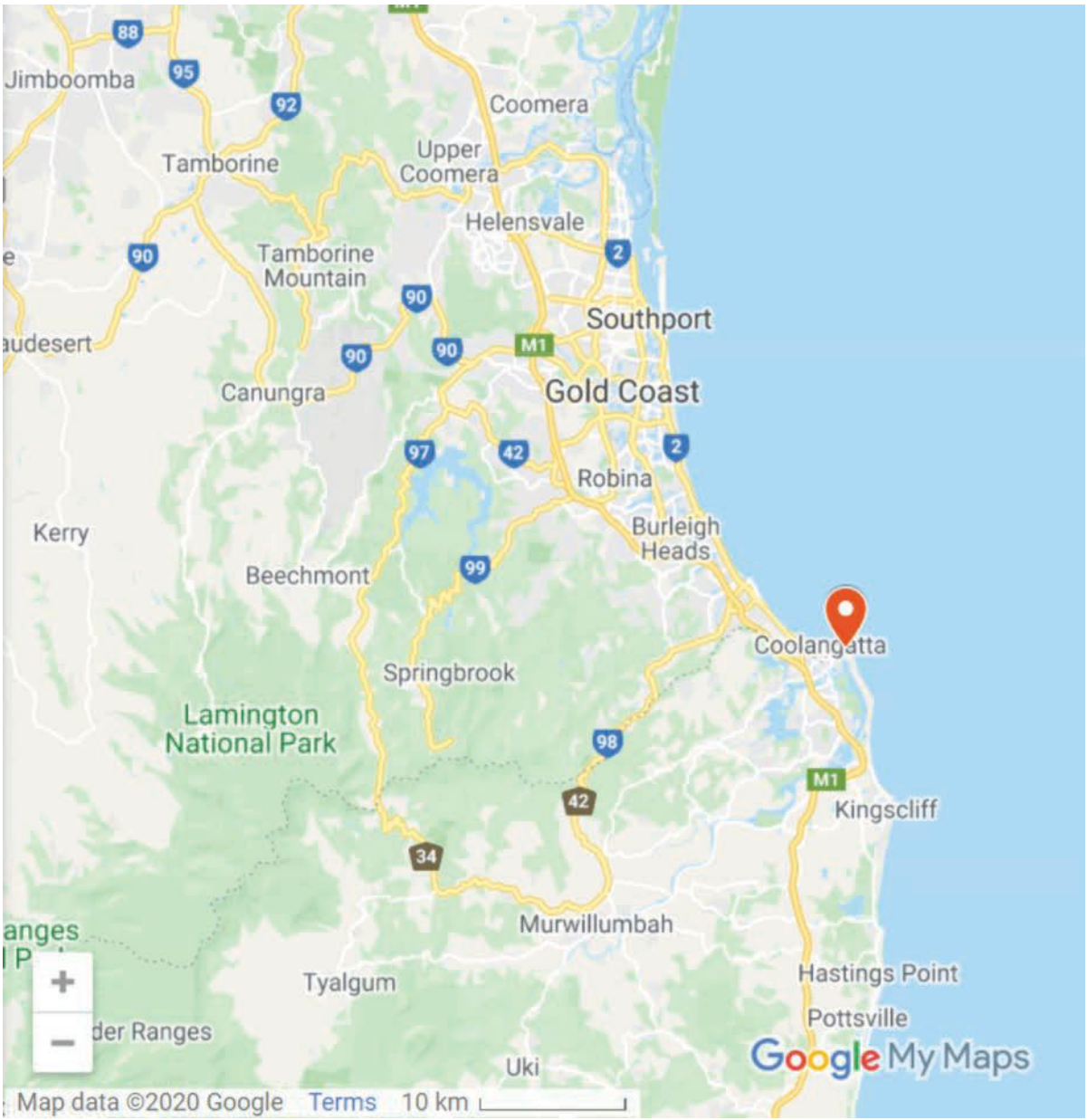
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storm surge a rush of water onshore caused by strong winds pushing on the ocean's surface

groyne a low wall built out from the coast into the sea, to prevent the repeated movement of the waves from removing parts of the land

dredging clearing up materials from water

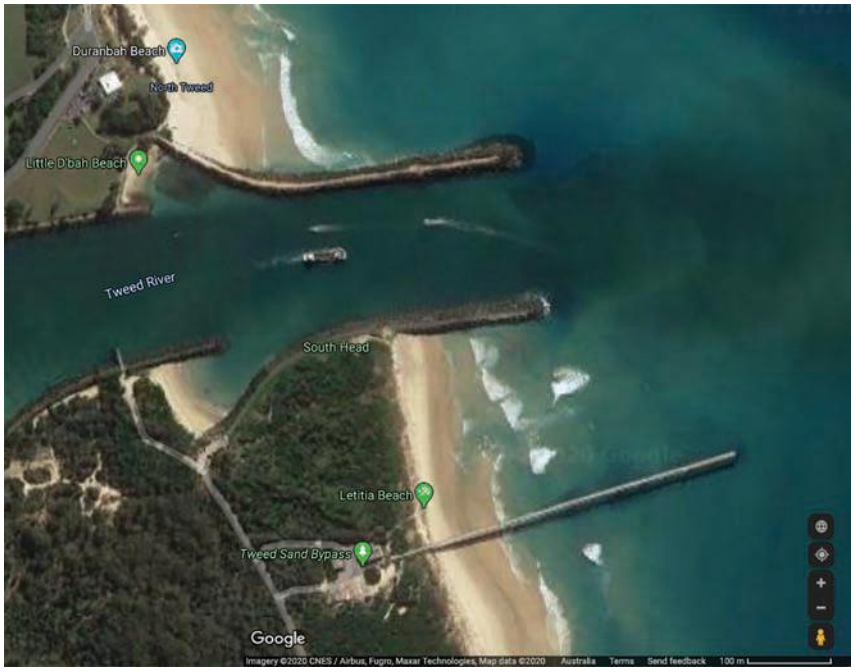
The threat of **storm surges**, high tides and coastal erosion often requires coastal developments to be protected by measures such as sea walls, **groynes** and **dredging**. These interfere with the natural cycle of erosion and deposition on coasts, often protecting the urban environment in one location while degrading or destroying environments such as beaches, dunes and wetlands elsewhere. For example, training walls were first built in 1891 at the mouth of the Tweed River on the border between Queensland and New South Wales. They were extended in 1962. Their original intention was to maintain a deep channel and prevent the deposition of sand in the mouth of the river. This deposition was making it difficult for boats to access the river system, a significant issue at the time. The training walls began disrupting the natural processes of longshore drift. Erosion began occurring on Gold Coast beaches.



▲ **Figure 4.85** The location of the Tweed and Nerang river mouths where both sand bypass systems are built

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In 2001, a sand bypass system was built to ensure sand was moved from the southern side of the walls to the northern side. This replenished the sand levels at beaches along the Gold Coast. The Southport spit at the northern end of the Gold Coast was the second location for a sand bypass system. As can be seen in Figure 4.87, the mouth of the Nerang River was under threat of being closed off by the deposition from a longshore drift heading north. This would have connected the spit with South Stradbroke Island with a disastrous impact on fisheries, recreation and the Broadwater in general. The Southport Seaway was built to stop the longshore drift and the sand bypass was built to pump the sand back into the longshore drift for transport north to Stradbroke Island and beyond.



▲ **Figure 4.86** Sand bypass system and training walls at the mouth of the Tweed River

Recreation

For the billions around the world who live by the coast and the millions who visit, coastal landscapes are some of the most popular locations for recreational activities, including beach-going, water sports, fishing and holidaymaking. Sensitive coastal environments are placed under pressure and may be degraded by these activities due to erosion, pollution and littering, overfishing and building developments. Some locations become too popular for their environments to cope with the numbers of recreational visitors. After its sand was declared the 'whitest in the world', the tiny village of Hyams Beach in southern New South Wales was forced to turn away thousands of vehicles a day in the summer peak holiday period. In April 2018, the government of the Philippines closed Boracay Island, the country's most popular tourist attraction, indefinitely. The area is known for its party season and attracted 1.7 million tourists in 2016. The island does not have the infrastructure, including roads, buildings and waste disposal, to cope with such temporary increases in populations. The island has since been reopened.

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▲ **Figure 4.87** The Gold Coast Seaway (or Southport Seaway as it is sometimes known) boasts the world's first permanent sand bypass system and stands as one of the country's most significant engineering feats from the 1980s.

Natural resources

Humans use coasts for urbanisation and recreation, but they also exploit their natural resources, often degrading coastal landscapes. Coastal hinterlands are used for agriculture, mining for sand, coal and other minerals, and drilling for oil and gas. Each of these processes can damage or destroy wildlife habitats on land and affect marine environments when fertilisers or waste enters rivers and flows into the sea. Australia's Great Barrier Reef has lost half its coral since 1985. One of the most significant factors responsible for this loss is nitrogen from fertilisers flowing from 35 major rivers into the reef's waters, promoting the growth of algae and plagues of crown-of-thorns starfish that destroy the reef's coral.

CASE STUDY 4.8

Oil drilling in the Great Australian Bight

High, sheer cliffs mark the place where the vast Nullarbor Plain ends and drops suddenly into the ocean. Curving inward, creating a landform known as a bight, these are the world's longest continuous sea cliffs – the Great Australian Bight. The waters of the Bight form a largely untouched marine environment, home to a diverse range of marine animals – whales, dolphins, and fish – around 85 per cent of which are unique to the area. Recent plans to allow drilling for oil in the Bight have been met with fierce opposition from environmental groups and the public. They fear the effects of seismic blasting on marine creatures and the catastrophic impact of an oil spill on the Bight's environment. The risk is exacerbated by the deep water and powerful waves found in the area.



▲ **Figure 4.88** The extensive cliffs of the Great Australian Bight

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ACTIVITY 4.21

Check your understanding

1 **Identify** the percentage of the world and the Australian populations that live on the coast.
2 **Identify** three ways humans use coasts for recreation.
3 **Identify** the percentage of coral lost by the Great Barrier Reef since 1985. **Explain** one of the major causes of this loss.
4 **Explain** the process of longshore drift and how the training walls at the mouth of the Tweed River disrupt natural processes.
5 Using the Gold Coast as an example, **describe** how urban development can degrade coastal landscapes.
6 Refer to Case study 4.8:
   a **Describe** the features that make the Great Australian Bight such an important and sensitive environment.
   b Why do you believe protesters are so opposed to oil drilling in the Great Australian Bight?
7 'It is essential to regularly close Boracay Island to protect it from mass tourism.' **Discuss** this statement, taking into consideration the social, environmental and economic impacts of closing the island regularly.

Resource use

The growing size, urbanisation and wealth of human populations increases pressure on landscapes to be exploited for their **natural resources**. This includes agriculture (farming), which uses soil, water, and minerals to grow food; mining, which extracts the ores, rocks and minerals used to build and power cities; and forestry, which uses the wood from trees for building, paper and energy. Each of these processes causes changes that may degrade landscapes.

natural resources any part of the natural environment

salinisation the build-up of salts at or near the soil surface, either by natural processes, such as evaporation, or by land clearing

Agriculture often involves the clearing of natural environments, such as forests and grasslands, reducing biodiversity. Overgrazing and cropping reduce the value of soil as a resource to produce future herds and crops and can result in erosion and **salinisation**. Fertilisers and pesticides enter water systems, eventually flowing into the ocean and degrading marine ecosystems such as reefs, and enter the food chain, affecting the health of humans.

Mining physically alters landscapes, especially open-cut mines that create large holes in the Earth's surface. Waste produced in the mining process is often toxic, severely degrading natural environments and the health of humans where it is released into the air or water systems. Large-scale mining can release hazardous chemicals, such as cyanide or mercury, into river systems, which then flow into oceans. This can destroy natural features and habitats. The approval of the Adani mine in Queensland is expected to have some positive impacts for the economy; however, the environmental effects could be devastating. Pollutants released into the river systems will eventually flow into the Great Barrier Reef, significantly affecting the environment of a World Heritage–listed area.

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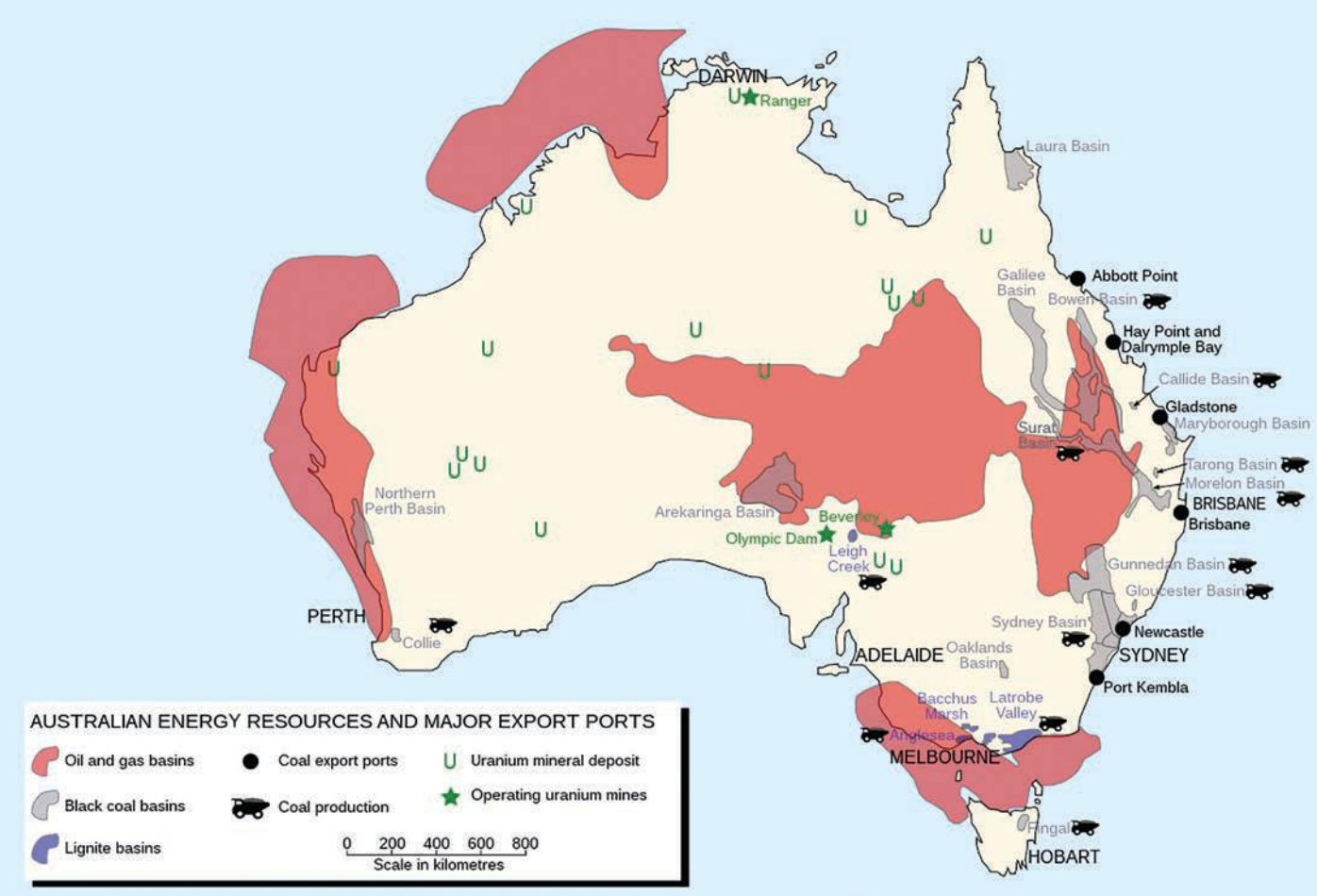


▲ **Figure 4.89** Intact coral (left) and bleached coral (right) on Queensland's Great Barrier Reef. Agricultural run-off introducing pollutants to the reef's ecosystem is believed to be a major cause of the degradation of the reef.



▲ **Figure 4.90** An aerial view of mining pollution over the forested landscape near a disused copper-sulphide mine in the Urals, Russia, in June 2020

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▲ **Figure 4.91** Australia has many types of natural resources, all of which require mining or drilling of some kind. Queensland has a large majority of these energy resources.





▲ **Figure 4.92** The destruction of Indonesia's rainforest to make room for oil palm plantations is a threat to the survival of orangutan populations in the wild.

How do humans impact forest landscapes?

Forestry reduces biodiversity by replacing the complex ecosystems of natural forests with **plantations** consisting of one type of tree. This also destroys habitats, threatening or causing the extinction of plant and

forestry the science and practice of planting and taking care of forests

plantation a farm or estate where selected crops are grown

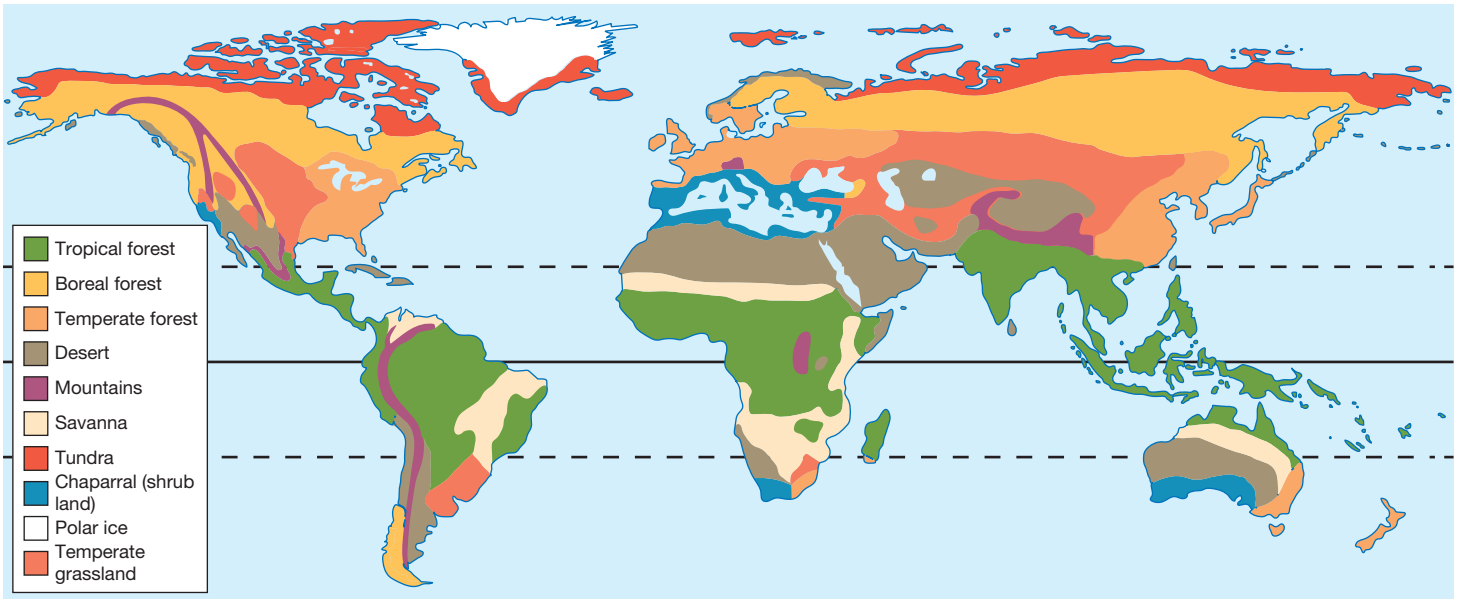
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animal species. Clearing forests and burning forest waste also release carbon into the atmosphere, contributing to climate change.

The extent of land degradation and impact on landscapes of these human processes varies greatly depending on the sustainability of the practices involved.

Forest landscapes have been used by humans throughout history, providing a source for food, medicines, timber, land and other resources, as well as a location for recreation. This interaction with people means that few of the world's forests are truly pristine – untouched in some way by humans. In many cases, human use has degraded forest landscapes, with the greatest impact being **deforestation**.

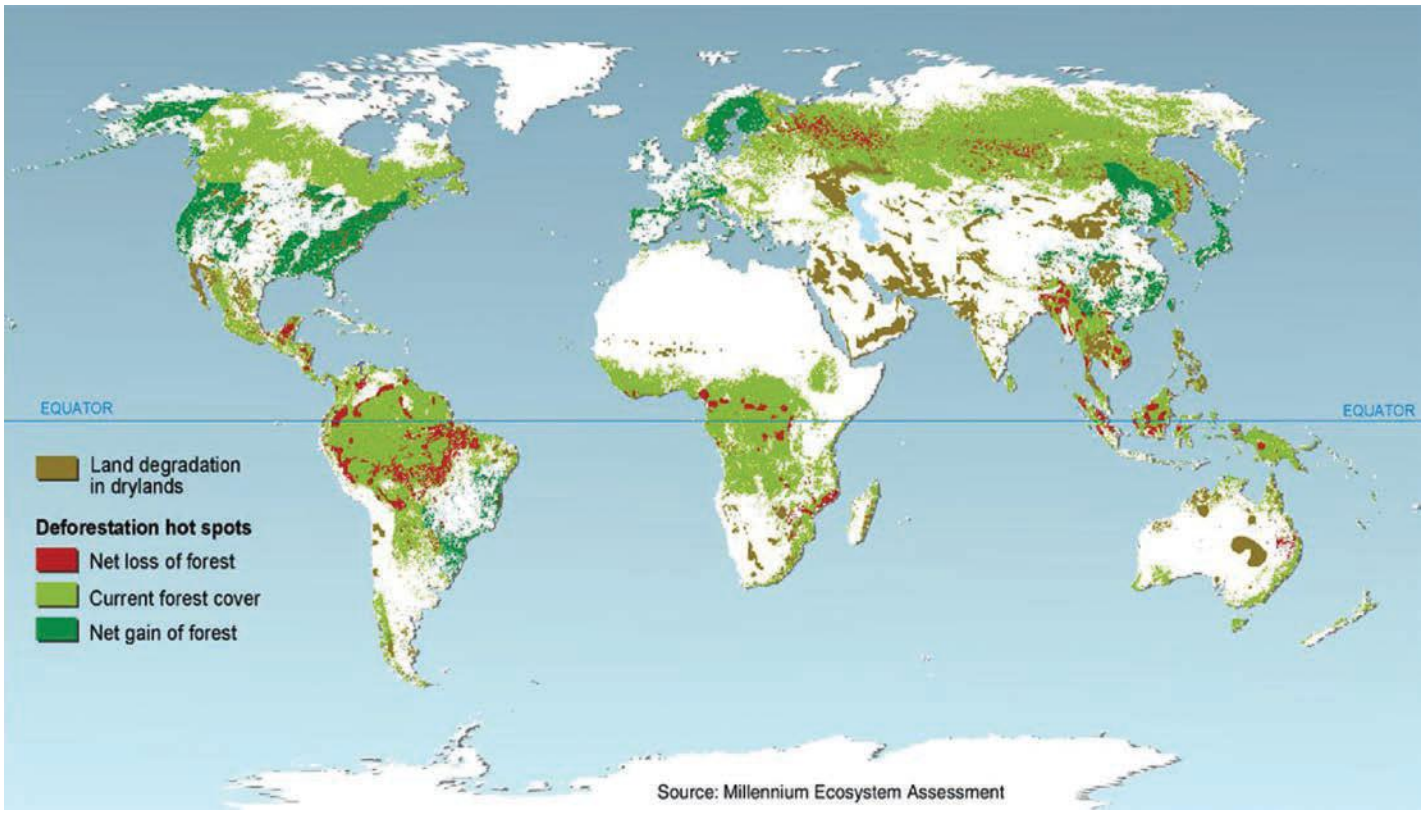
deforestation the permanent clearing of a forest and use of the land for another purpose



▲ **Figure 4.93** The distribution of the world's forest zones and other land cover. These are the areas where forest is the natural dominant vegetation type, before land use for agriculture, industry and urbanisation modified the landscape.

It is estimated that more than half of the world's original forest cover has been lost to deforestation. Between 2001 and 2018, 361 million hectares of tree cover was removed across the globe, with an area roughly four times the size of Tasmania lost each year. The main causes of this loss are conversion of the land for agriculture, in particular for grazing cattle, farming soy and palms for oil, and harvesting of timber for domestic consumption or export. Fire is also a significant cause, both natural bushfires and fires deliberately lit in order to clear the land.

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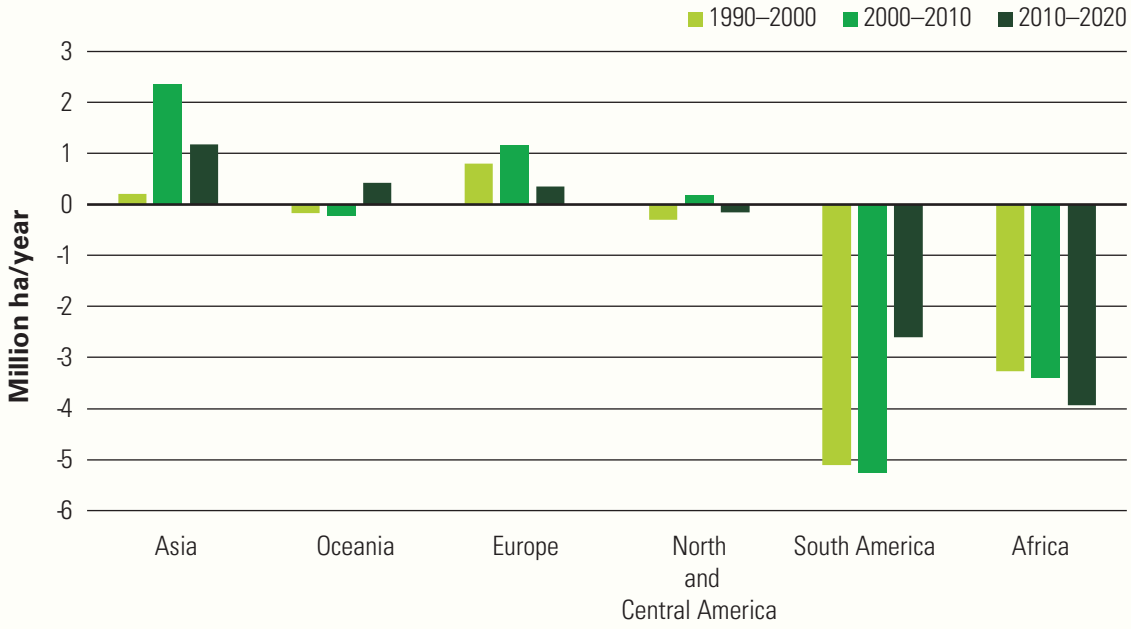


▲ **Figure 4.94** Changes in world forest cover, 1992–2012

ACTIVITY 4.22

Check your understanding

1 **Identify** three major regions of the world with major net loss of forest (where more forest has been lost or destroyed than has been grown), using Figure 4.94.



▲ **Figure 4.95** Net forest area change by region in million hectares per year, 1990–2020

Source: Food and Agriculture Organization of the United Nations, 2020

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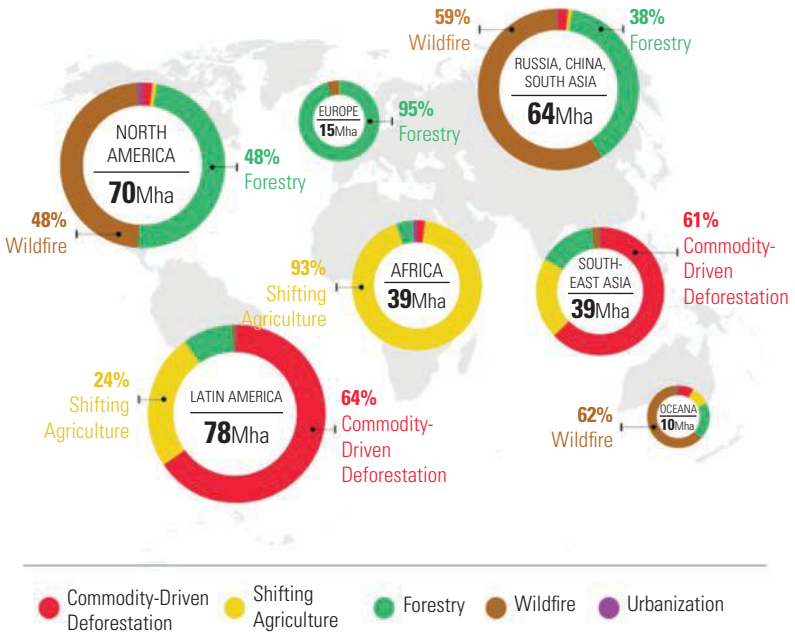
2 **Describe** where net loss of forest was greatest in Australia and neighbouring countries between 1992 and 2012, using Figure 4.94
3 **Determine** which continents saw the greatest net gain of forest between 1992 and 2012, using Figure 4.94. **Suggest** a reason why forest cover in an area might have increased.
4 **Use** Figures 4.94 and 4.95 to **compare** and contrast your observations for the period 1992–2012 with the net forest area change in 2010–2020.

Where is deforestation most severe?

Between 1992 and 2012, the largest areas of forest loss were in the tropical rainforests of South America, South-East Asia and Africa, and Russia's taiga forest. The causes vary.

However, human impacts on forests ought to be considered since the invention of agriculture, and that goes back some 10 000 years. Figure 4.93 shows the zones in which each of the three types of forest would grow if there were no human impact on forests. These are a guide to original forest cover before large-scale farming and ranching. Figure 4.94 shows 2012 forest cover. As you can see, some parts of certain forest zones do not currently have forest cover. Compare the forest zones and current forest cover, and consider how much human impact there appears to have been on forests using this method.

It may be that in the last 20 years, countries such as Brazil and Indonesia have been catching up with what had already been taking place in Europe, China and India for centuries, if not millennia. Research shows, for example, that extensive forest clearing for farming and grazing started 5000 years ago in Great Britain, and by the time the Romans arrived in 55 BCE, in some areas half of the forests had gone.



▲ **Figure 4.96** The different drivers of tree-cover loss around the world, 2001–15

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Although the major cause of tree-cover loss in Australia is bushfire, deforestation is also a significant contributor, with 4.45 million hectares cleared between 2001 and 2018, an 11 per cent reduction in tree cover. The vast majority of this deforestation occurred in Queensland, where huge tracts of forest have been bulldozed to allow for cattle grazing and cropping. Other reasons for deforestation include urbanisation, using wood for building materials, and the economic benefits of exporting wood to other countries.

ACTIVITY 4.23
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Constructing bar graphs

To construct a simple bar graph, follow the steps below:

1. **Select** the set of information to be represented on the horizontal axis; this will be the quantifiable variable in the case of bar graphs. (Note that the axes are swapped if you are creating a column graph, as in Figure 4.95.)
2. **Select** the variable to be plotted on the vertical axis. It is usually the non-quantifiable data; for example, the year, country or age group.
3. **Decide** on the width and spacing of the bars.
4. Draw the axes, ensuring they can accommodate the range of data to be graphed. Label each axis and give the graph a title.
5. Draw in the bars in pencil, making sure the value of each is accurately plotted.
6. Colour each bar and label if appropriate.

Use the data in Table 4.2 to complete the activity.

▼ **Table 4.2** Vegetation clearing in Queensland

Year	Hectares
2009	83 000
2010	92 000
2011	155 000
2012	261 000
2013	295 000
2014	296 000
2015	390 000
2016	356 000
2017	392 000

1. **Create** a bar graph using the information in Table 4.2.
2. **Describe** the pattern of change in land clearing from 2009 to 2017.
3. **Identify** in what year the rate of vegetation clearing was the highest in Queensland.
4. **Identify** between which two years the greatest increase in vegetation clearing occurred. Calculate, approximately, the increase in vegetation clearing between these two years.

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The impact of deforestation on both the natural environment and humans is significant. More than 80 per cent of terrestrial plant and animal species live in forests. Deforestation lessens biodiversity and threatens many species with extinction, including Sumatran tigers, orangutans and Victoria's Leadbeater's possum. Around 750 million people also live in forests, including 60 million indigenous peoples, with a further 1.25 billion people reliant on forests for resources such food, water and energy, and for their livelihoods. Increasing rates of deforestation threatens the sustainability of these people's standard of living and quality of life.

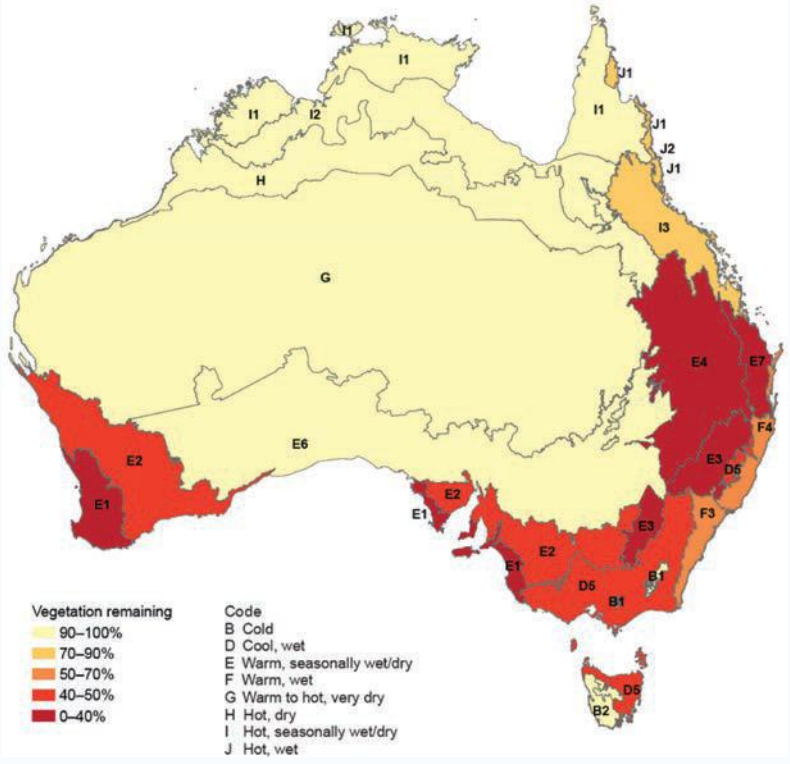
Deforestation is also a major contributor to climate change. Trees absorb carbon through the process of photosynthesis, with the world's forests storing massive amounts of carbon. When forests are burned, stored carbon is released into the atmosphere, mainly as carbon dioxide. However, this is a complex issue and any analysis has to look very carefully at exactly what the deforested areas are subsequently used for.

CASE STUDY 4.9

The effect of land-clearing: Queensland's disappearing Brigalow woodland

Deforestation in Australia, and particularly Queensland, has historically been so high that Queensland is now an infamous world leader in deforestation. Since European colonisation, farmers and successive governments have sought to clear the native vegetation to grow crops, graze cattle and sheep and build urban settlements. The Queensland Government even created laws that encouraged farmers to clear the Brigalow woodland for payment, with most of the deforestation occurring since the 1960s.

Many of these laws have only recently been changed to stop the deforestation. Brigalow Acacia (*Acacia harpophylla*), see Figure 4.98, is a particular species of silvery wattle that covers a large area of Queensland, stretching from Townsville down the east coast and inland regions to northern New South Wales. This area is known as the Brigalow Belt. The canopy of the Brigalow is usually 10–15 metres in height. Other dominant tree species that may occur



▲ **Figure 4.97** This map displays the remaining vegetation after decades of deforestation throughout Australia. The map shows evidence of the heavy deforestation that has occurred mostly throughout Queensland with only 40 per cent of natural vegetation remaining, with similar numbers in New South Wales and Victoria. The pattern of deforestation follows the urban and agricultural areas that have required land to be cleared down the east coast and the urban areas of Western Australia. The code letters show the differing climates that also impact the growth of vegetation.

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with the Brigalow include Belah, Gidgee, Lancewood or Bendee. The area is also home to native grasses and shrubs that create a special ecosystem for many native animals. Today, however, there is only a small remnant of Brigalow left in a few national parks.

Along with this almost total destruction of native bushland vegetation comes the loss of many native species of animals. Of the animal species that once occupied the Brigalow Belt, several are now totally extinct. These include the paradise parrot, white-footed rabbit-rat, brush-tailed bettong and the Darling Downs hopping-mouse. A number of other animal species are now regionally extinct; for example, the bilby, eastern quoll and long-nosed bandicoot.



▲ **Figure 4.98** The dominant tree species, Brigalow Acacia, gives its name to the type of bushland that once covered Queensland's east coast.



▲ **Figure 4.99** An aerial photo of land cleared in the Mary River Valley in South East Queensland, once the home of the gastric brooding frog, which has been extinct since the 1980s



▲ **Figure 4.100** Brigalow with Belah and a diverse shrub layer at Barakula in southern Queensland

For more information, search for 'Brigalow Belt Forests in Queensland' on the Australian Government Department of Agriculture, Water and the Environment website.

ACTIVITY 4.24

Check your understanding

1 **Explain** what is meant by 'landscape degradation'.
2 **Describe** and **explain** the term 'urbanisation'.
3 Summarise the change in the percentage of the world's population living in urban areas between 1950 and 2018.
4 Using examples, **explain** what natural resources are.
5 **Describe** the interconnection between urbanisation, megacities and landscape degradation in a short paragraph.
6 **Create** a flowchart that explains how the human use of one of the natural resources described in this section contributes to the degradation of landscapes.
7 Using examples from this section, **explain** the relationship between landscape degradation and the concept of sustainability.

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CASE STUDY 4.10

Palm oil: the loss of forests around the world

Palm oil has been used by humans for thousands of years, with evidence of it being used by the ancient Egyptians. Today, palm oil is the major cause of deforestation in South-East Asia and around the world. The oil palm tree produces fruits that contain very high levels of oil within the fruit flesh and the seed kernel inside.



▲ **Figure 4.101** Oil palm trees in Malaysia and an oil palm stem with its fruits

It is this oil that has become heavily sought after and used in everything from food additives and cosmetics to biodiesel oil for machinery. Most people are not aware that the products they use or eat contain this cheap palm oil. Over the past 60 years, the world's demand for palm oil has increased to 74 million tonnes annually and is expected to double by 2050. Indonesia and Malaysia are the first and second largest producers of palm oil. Other large producer countries include Thailand, Nigeria, Columbia and Ecuador. Over the past 60 years, up to 60 per cent of the equatorial rainforests in Malaysia and Indonesia have been cleared to plant the oil palm for commercial use.



▲ **Figure 4.102** Cleared forest for palm oil plantation on the left and natural rainforest on the right



▲ **Figure 4.103** Orangutans have become endangered as their rainforest habitat is destroyed to make way for palm oil plantations. They are one of many species becoming endangered or are now extinct due to deforestation on the island of Borneo.

There are both positive and negative impacts of the palm oil industry. Social impacts are often positive and relate directly to economic outcomes. There are more jobs and the country's economy is supported by benefits from exports of the product.

However, the environmental impacts are disastrous. The rainforest destruction has caused many plants and animals to become extinct or endangered due to destruction of habitat – most notably, the orangutan, native to the island of Borneo. There is now very little natural habitat for these beautiful creatures to survive.

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DEVELOPING YOUR UNDERSTANDING 4.4

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** the term 'deforestation'.
2 **Identify** two causes of deforestation.
3 **Identify** four different human uses of forests.
4 **Describe** the main way in which deforestation contributes to emissions of carbon dioxide.

Interpret

5 Use Figures 4.93 and 4.94 to answer these questions.
   a **Identify** the two types of forest you think have had the greatest net loss of forest.
   b **Identify** the forest zone you think has had the greatest net gain of forest.
6 Figure 4.93 shows the zones in which each of the three types of forests would grow if there were no human impact on forests. Figure 4.94 shows the 2012 levels of forest cover. Some parts of certain forest zones do not currently have forest cover. **Compare** the forest zones and 2012 levels of forest cover for these countries or regions, and **describe** how much human impact there appears to have been on forests in:
   a Europe
   b the United States
   c Australia
   d Brazil.
7 **Identify** where most of the deforestation in Australia occurred in 1992–2012, as shown by Figure 4.94. **Determine** why you think this might be.

Argue

8 **Explain** what is meant by reforestation. Include two examples of reforestation in your answer. Despite the massive reforestation projects taking place in different countries, why do you think the overall level of the world's forest cover continues to decrease?



◄ **Figure 4.104** A palm oil plantation in Indonesia, grown on deforested land

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4

4.5 How might the causes and impacts of a geomorphological hazard affect how people manage and respond to such events?

FOCUS QUESTION

How have humans learned to live with the possibility of a geomorphological hazard or natural disaster?

This section examines what is meant by geomorphological hazards and natural disasters. A study is made of a natural disaster, considering the causes, impact on both landscapes and humans, the human response to the disaster, and efforts to minimise the impact of similar hazards in the future.

New Zealand's Whakaari/White Island volcano disaster

Tours to Whakaari/White Island offer the adventure of a lifetime: the chance to walk upon New Zealand's most active volcano.

Formed by the cone-shaped tip of a mostly submerged stratovolcano, Whakaari/White Island is located in the Bay of Plenty, off the east coast of New Zealand's North Island. A barren landscape roughly three kilometres in length and two kilometres wide, the island is only accessible by boat, seaplane or helicopter. Visitors are guided to the volcano's crater, passing pools of boiling mud and steaming clouds of sulphur. On 9 December 2019, this spectacular adventure turned into a nightmare for the 47 people on the island. A large eruption spewed a column of ash more than three kilometres into the sky, with exploding rock, ash and poisonous gases covering the island. Tour operators used boats to immediately rescue 23 people from the island; however, subsequent search-and-rescue operations were inhibited by dangerous conditions, preventing boats and helicopters from landing on the island. Ultimately, 22 people were killed (two of whom are missing and declared dead) and 25 seriously injured in this tragic natural disaster.



▲ **Figure 4.105** A tour group trekking on Whakaari/White Island, prior to the disaster of December 2019

The story of the Whakaari/White Island eruption reflects the themes of this section: how a natural hazard – the volcano – and its eruption impacts humans and the natural environment, and the efforts of humans to respond to the disaster.

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▲ **Figure 4.106** Former New Zealand Prime Minister Jacinda Ardern meets with first responders at the Whakatane Fire Station on 10 December 2019 in Whakatane, New Zealand.



▲ **Figure 4.107** Satellite image of the Whakaari/White Island volcano after the eruption, 13 December 2019

ACTIVITY 4.25
MAKING THINKING VISIBLE

Think, pair, share

Reflect on the story of the Whakaari/White Island volcano.

1 *Think* about the story of the Whakaari/White Island volcano and **explain** your thinking with pictures or words in your notebook or on your digital device.
2 *Pair* with a peer and *share* your thoughts. **Explain** why you think people risk taking part in hazardous activities such as visiting an active volcano.
3 **Decide** whether the tour company should be held responsible for the tragic deaths and injuries caused by the disaster.

Hazard and disaster, words that we may use and hear often, have a specific meaning for geographers. A **hazard** is a situation that has the potential to cause harm to people, their property or the natural landscape. An active volcano, a total fire ban and an avalanche warning are all examples of hazards. They all have the potential to cause harm but are yet to do so. If the potential is realised and the volcano erupts, a bushfire starts or an avalanche occurs, it is known as a **hazard event**. The severity of the hazard event and the amount of harm caused determines if the event is a **disaster**. There is no exact measure of the amount of harm that constitutes a disaster, but a hazard event that causes significant damage to humans, through the loss of life or property, and or to the natural environment, is usually considered a disaster.

Natural hazards or disasters are those caused by nature or natural events such as floods or bushfires. Where these events affect the characteristics of the Earth's surface, they are known as **geomorphological hazards or disasters** and include volcanic eruptions, earthquakes, tsunamis, landslides and avalanches. Hazards created by humans, such as an oil spill or chemical leak, are known as **technological hazards or disasters**.

hazard a situation that has the potential to cause harm to people, their property or the natural environment

hazard event the realisation of a hazard, such as the eruption of a volcano

disaster a hazard event that causes significant damage to human or natural environments

natural hazards/disasters hazards or disasters caused by nature or natural events

geomorphological hazards/disasters natural hazards or disasters that affect the characteristics of the Earth's surface

technological hazards/disasters hazards or disasters caused by the actions of humans

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▲ **Figure 4.108** An active volcano, Mt Agung in Bali, Indonesia (left), has the potential to erupt, which makes it a hazard. The 2017 eruption (right) is a hazard event; however, the lack of damage to people and the landscape means it was not classified as a disaster.



▲ **Figure 4.109** Wreckage in Miyako, after a tsunami hit the city in north-east Japan on 15 March 2011, and the same area (bottom right) on 19 February 2021, ahead of the 10th anniversary of the Great East Japan Earthquake

ACTIVITY 4.26

Check your understanding

1 **Explain** what geographers mean by the terms 'hazard' and 'hazard event'.
2 **Describe** how a disaster is different from a hazard or hazard event.
3 **Describe** what type of hazard Whakaari/White Island is and where it is located.
4 **Explain** the human impact of the Whakaari/White Island eruption in terms of the number of deaths and injuries.
5 **Explain** the difference between a geomorphological hazard and a technological hazard. **Use** an example to illustrate your answer.
6 **Explain** why not all hazard events are considered disasters. Support your answer with examples from this section of the chapter.
7 'People make the choice to take part in dangerous activities such as the tours to Whakaari/White Island, so it is their responsibility if something goes wrong.' Write a paragraph that argues for or against the statement.

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What were the causes of the Nepal earthquake and how did it affect landscapes and humans?

On 25 April 2015, a massive earthquake devastated the Himalayan country of Nepal. Thousands of people were killed, even more injured, and their homes and other buildings destroyed. This section examines the type and causes of this natural disaster, its impact on humans and landscapes, and how humans responded to these impacts.

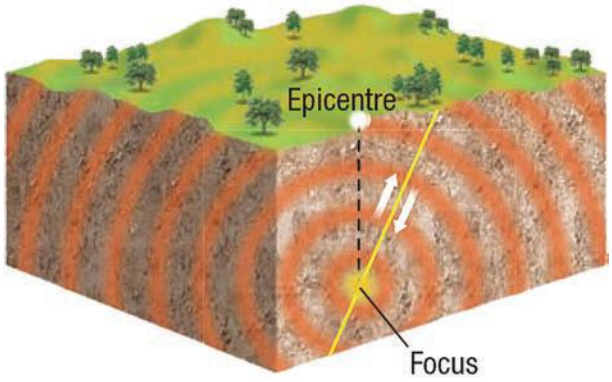
seismic waves vibrations of the Earth's crust that cause earthquakes

focus the point in the Earth's crust where an earthquake originates

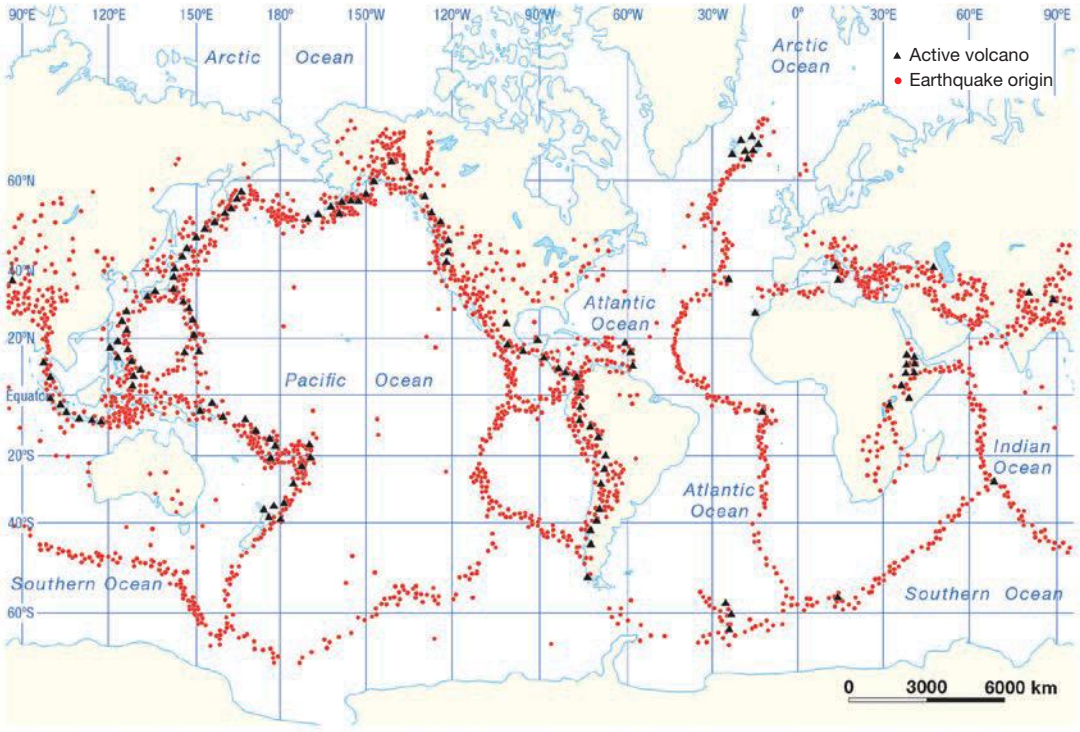
epicentre the point on the Earth's surface directly above the earthquake's focus

THE TYPE OF HAZARD INVOLVED AND ITS CAUSES

Earthquakes are one of the most powerful and deadly types of natural disaster. They are caused by the movement of the tectonic plates that make up the Earth's crust. The friction created by the size, mass and jagged edges of the plates means that as they crash into and slide alongside each other, they may become stuck, building up huge amounts of pressure that, when finally released, sends vibrations known as **seismic waves** through the crust, causing the surface of the Earth to shake. Figure 4.111 shows the direct connection between plate tectonic movement and the location of global earthquakes. The origin of the seismic waves within the crust is known as the earthquake's **focus**, and the point directly above this on the surface is the **epicentre**.

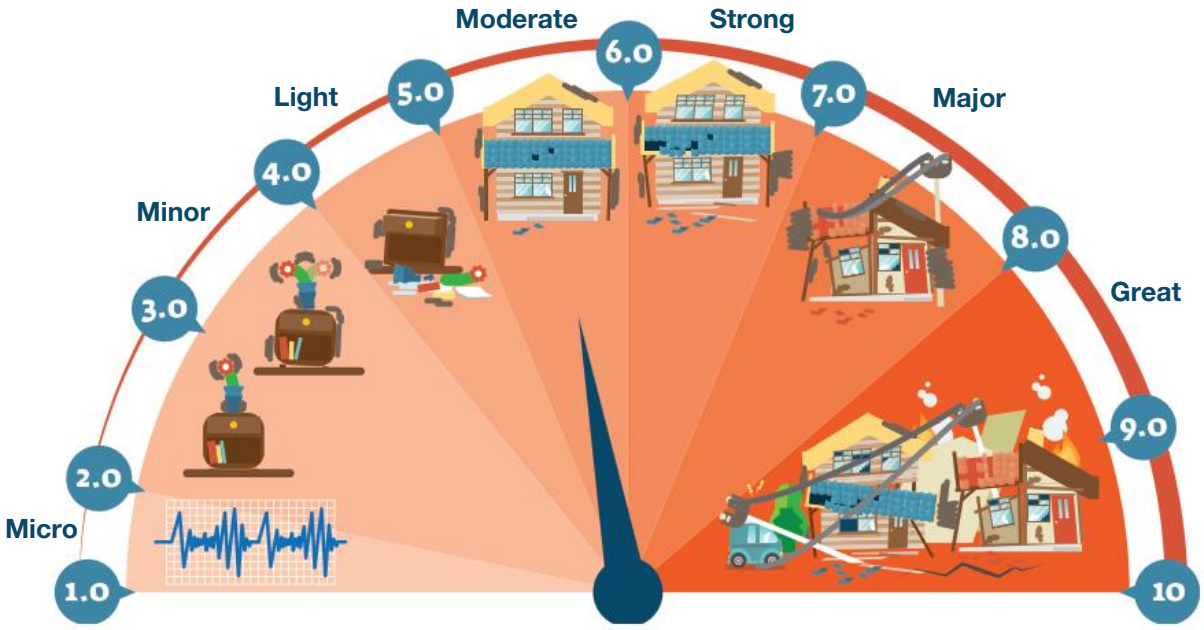


▲ **Figure 4.110** The focus, epicentre and seismic waves of an earthquake



▲ **Figure 4.111** Recent global earthquake activity (marked through red dots)

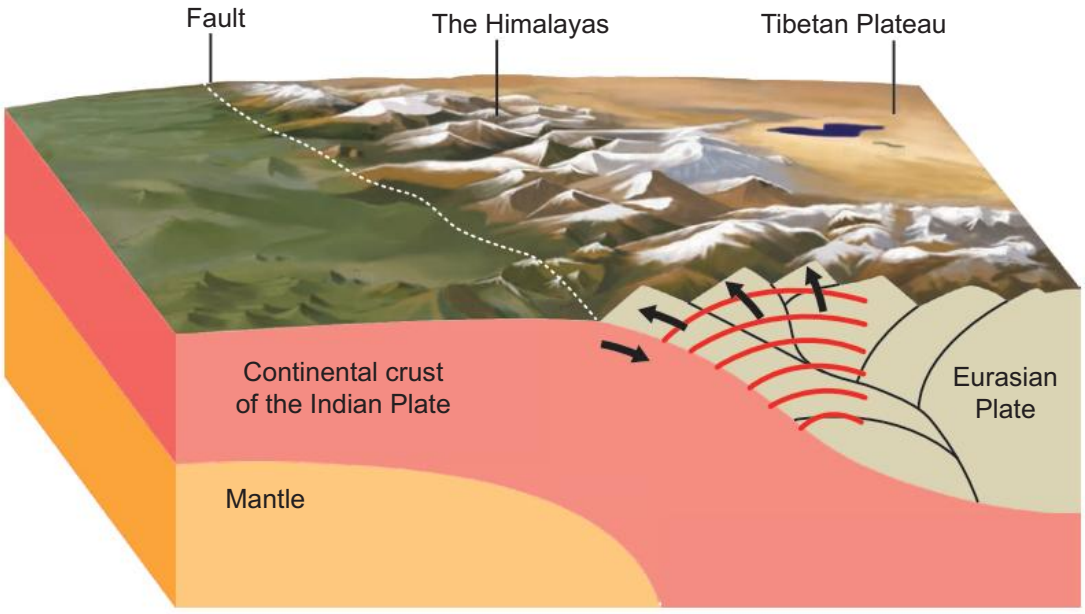
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▲ **Figure 4.112** Illustration of the Richter scale

Richter scale the scale used to measure the magnitude of an earthquake

Scientists describe the strength of an earthquake using the **Richter scale**, which places the magnitude of seismic waves on a scale from 0 to 10, with the power of the waves increasing tenfold from one level to the next. Minor earthquakes of a magnitude less than 3 occur millions of times each year but are imperceptible or barely felt by humans. Earthquakes with a magnitude greater than 7 are considered major and occur around 20 times each year globally. The size of an earthquake on the Richter scale is a helpful indicator of its potential impact, but this is also determined by other factors, including the depth of the focus, with shallow earthquakes having a greater impact than deeper ones, as well as the proximity to the earthquake's epicentre.



▲ **Figure 4.113** The convergence of the Indian and Eurasian tectonic plates created the Himalayan Mountain range, one of the world's most earthquake-prone landscapes.

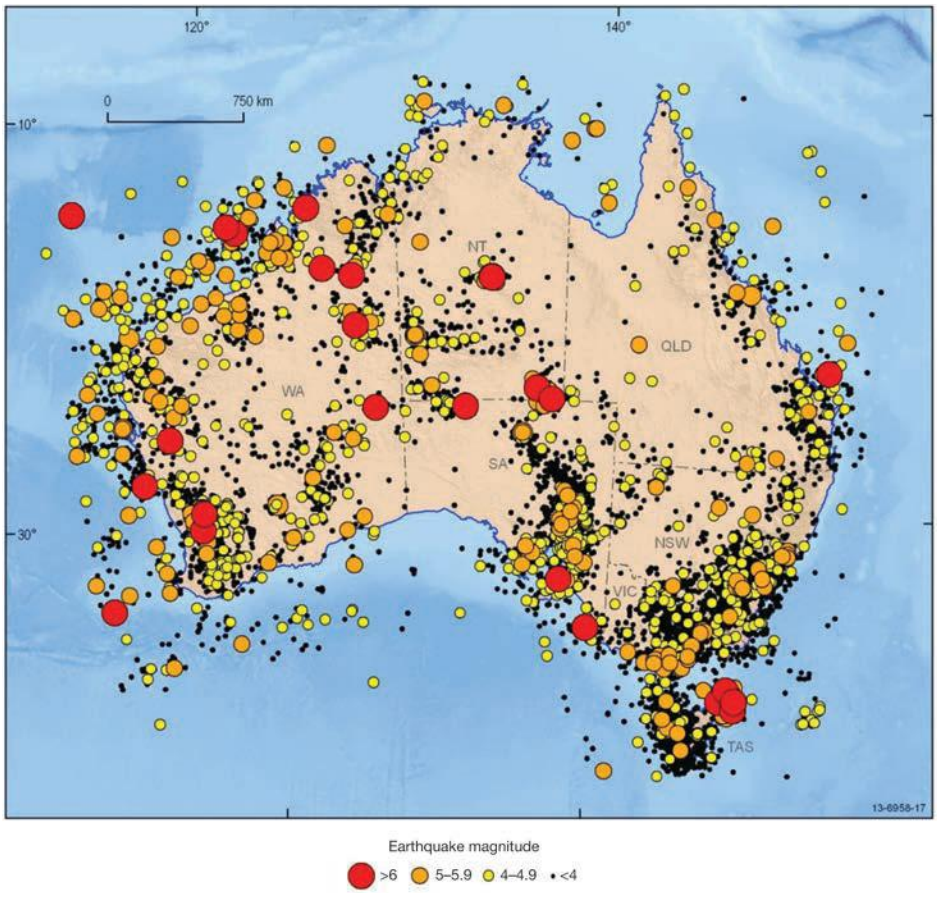
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The 2015 Nepal earthquake was caused by the collision of the Indian and Eurasian tectonic plates. As these giant slabs of the Earth's crust crash into each other, the Indian plate is thrust under the Eurasian plate, which is crumpling, creating the Himalayan mountain range. The build-up and release of pressure along the fault line between the plates results in regular minor earthquakes in the region, as well as major quakes, including one of magnitude 6.9 in 1988, and magnitude 8 in 1934.

Interesting fact

Earthquakes in Australia and Queensland

You may not realise it, but you have probably experienced an earthquake. Over the last century more than a thousand earthquakes have occurred in Queensland; however, most of these are less than magnitude 3, and are barely perceptible to humans. These 'intraplate' quakes are caused by the same processes as larger quakes, the movement of tectonic plates, but result from smaller faults within plates rather than on their margins. Most of the earthquakes in Queensland occur along the populated coastline east of the Great Dividing Range. The largest earthquakes in the state were at 6+ on the Richter scale, offshore near Gladstone in 1918 and Gayndah in 1935. (For more on Queensland's earthquakes see the University of Queensland website).



▲ **Figure 4.114** All detected Australian earthquakes up until 2011
Source: Geoscience Australia

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THE IMPACT ON PLACES AND HUMANS

aftershock one or more smaller tremors that follow the main shock of an earthquake

The 7.9-magnitude 2015 Nepal earthquake's epicentre was only 60 kilometres from Nepal's capital, Kathmandu, and was followed by a series of **aftershocks**, including one of 7.3-magnitude. These events had a dramatic direct impact on human landscapes, completely razing homes and entire villages in rural areas and destroying more than 180 buildings in Kathmandu, including a number of significant cultural and heritage sites. Overall, around 600 000 homes were destroyed and 280 000 damaged, leaving about 3.5 million people homeless. More devastating was that almost 9000 people died and 27 000 people were injured, as a result of collapsing buildings and landslides triggered by the quake. Among these were 19 climbers killed in an avalanche on Mt Everest. In the longer term, the arrival of the monsoon (rainy) season resulted in landslides, and a lack of basic food, shelter and sanitation increased the presence and risk of disease for those left homeless by the quake. Nepal, already one of the world's poorest countries, was also economically affected by the quake, with most of the season's crops destroyed and tourism numbers, an important contributor to the country's revenue, dropping significantly.

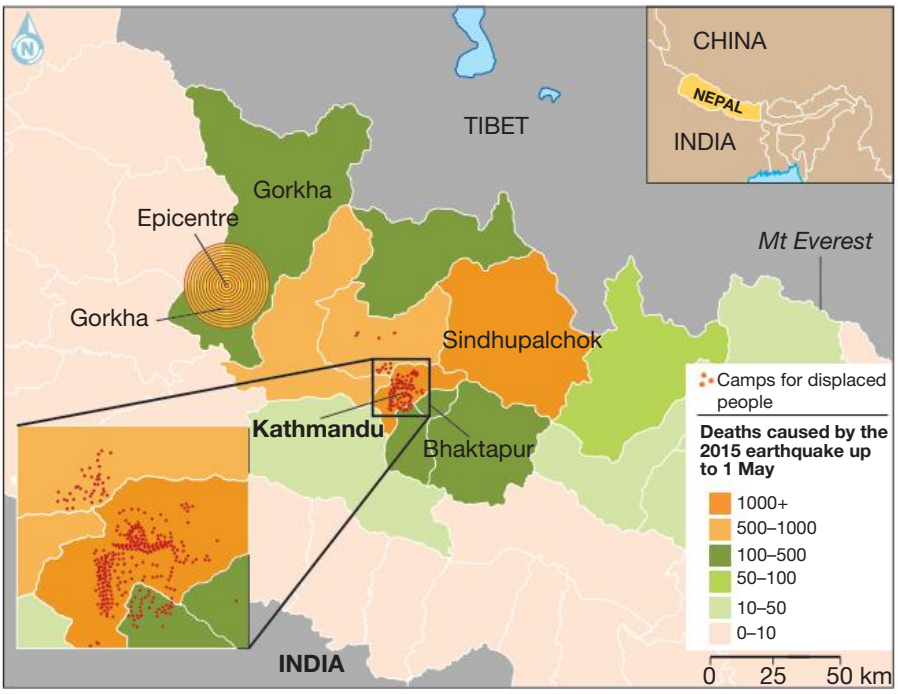


▲ **Figure 4.115** Destruction caused by the 2015 earthquake in the Nepalese capital, Kathmandu

RESPONSE TO THE DISASTER AND EFFORTS TO MINIMISE THE FUTURE EFFECTS OF SIMILAR HAZARDS

The devastating effect of the quake provoked an immediate response from the Nepalese government, other countries and international organisations. The initial priority, to locate and rescue survivors, was carried out by the Nepalese army with assistance from rescue teams sent from around the world. Nepal was then faced with the huge task of caring for the millions of people left homeless by the disaster. Donations of money, resources and personnel from national governments, individuals and non-government organisations, such as the Red Cross and World Vision, assisted with these efforts. India, Nepal's neighbour, donated more than $1 billion in aid, while the Australian Government provided more than $14 million in aid, and sent military and government personnel to assist.

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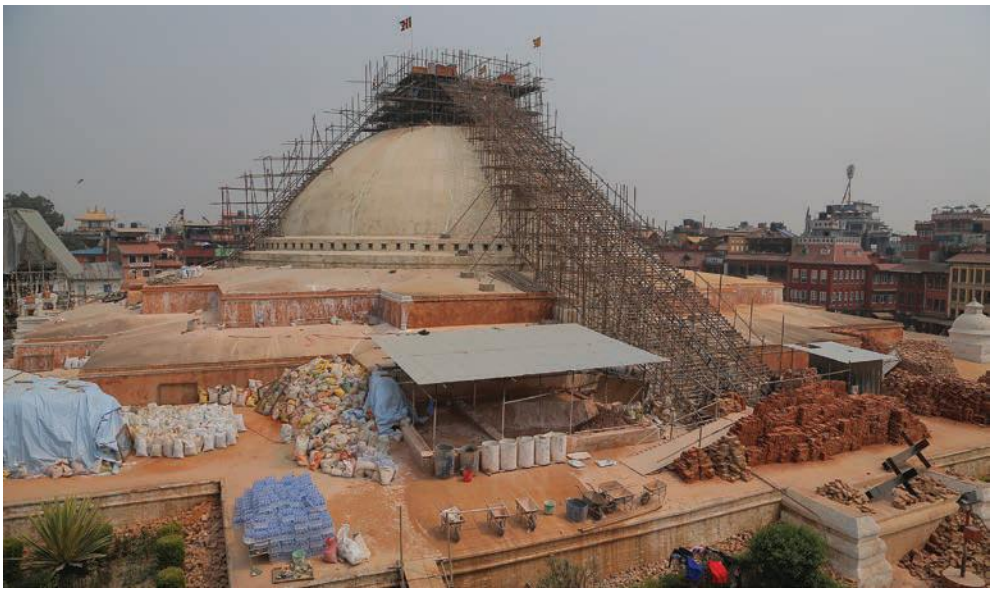
▲ **Figure 4.116** The location of the 2015 Nepal earthquake's epicentre and its death toll across the country

The reconstruction of buildings and infrastructure that were destroyed or damaged by the quake is ongoing. A number of factors have made reconstruction a slow and difficult process, including the sheer size of the task, determining how to distribute aid to fund reconstruction, and tensions in the community created by the building of modern, earthquake-proof buildings to replace historic and culturally significant buildings.



▲ **Figure 4.117** Gyan Binayak Phateja, 50, helps his neighbour by cutting iron rods from collapsed structures at Thulo Byasi in Bhaktapur, Nepal on May 14, 2015.

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▲ **Figure 4.118** Reconstruction work on the Boudhanath Stupa temple (a UNESCO heritage site) in Kathmandu in early 2016

DEVELOPING YOUR UNDERSTANDING 4.5

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Describe** the processes that caused the Nepal earthquake by writing a short paragraph using the terms 'focus', 'epicentre', 'seismic waves' and 'tectonic plates'.
2 **Identify** three types of damage caused by the Nepal earthquake.
3 Summarise the response to the Nepal earthquake by using the headings 'rescue', 'recover' and 'rebuild'.
4 **Describe** and **explain** the magnitude and impact of one earthquake that has affected Queensland.

Interpret

5 Refer to Figure 4.111 to complete the following tasks.
   a **Use** an atlas to **identify** one country in each continent that has experienced earthquakes. **Identify** which continent is the most earthquake-prone.
   b **Identify** two countries that have experienced earthquake activity that are not located on the boundary of a tectonic plate.
6 Refer to Figure 4.116 to complete the following tasks.
   a **Describe** the location of the 2015 earthquake's epicentre in relation to the city of Kathmandu.
   b **Describe** the relationship between the number of deaths caused by the earthquake and the distance from the earthquake's epicentre.
   c Based on this information, **identify** which factors, besides distance, can determine the magnitude of a disaster.
7 **Investigate** and **compare** the following two earthquakes: the 2011 Japan earthquake and the 2004 Boxing Day earthquake in Indonesia. **Identify** the basic facts of what and where the earthquakes occurred and find appropriate maps to illustrate the locations. List the magnitude, associated hazards, major impacts, earthquake management, social impacts, economic impacts and international aid for both earthquakes.
8 Write a paragraph response to **compare** the differences between the two earthquakes and **explain** why these earthquakes happened.

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Conclusion

Throughout this chapter you have been investigating the key inquiry question:

'How do the interactions of people and geomorphological processes shape and inform how humans perceive and manage the characteristics of places?'

As you undertook this geographic inquiry, you have learned about various geomorphic processes that shape the surface of the Earth. You have also learned about key landscapes and landforms across the continent of Australia. As you have studied the physical features of our planet, you have also learned about the importance of seeing landscapes and landforms as being connected with the cultures of the people who live on, near and use these landscapes. When you learn about landscapes in this way, it helps to understand that knowing about landscapes and landforms is more than just the physical processes that formed them. We also need to understand the spiritual, cultures, aesthetic and recreational reasons why people find landscapes and landforms significant.

ACTIVITY 4.27
MAKING THINKING VISIBLE

Key ideas

1. Take two to three minutes of individual reflection to **create**, from memory, a list of key ideas you recall from this chapter
2. Swap your list with the list of one of your classmates. Take one to two minutes to read that list and add new things (such as details, missing ideas, a correction etc.).
3. Repeat step 2 at least two times with different classmates.
4. Retrieve your list. Read through and review all the additions made to your list. Add any new ideas you might have had from reading three other lists.

Summarise your learning

1. Based on the information and sources in this chapter, either create a mind map or write a short response of 5–10 sentences to summarise what you have learned and to answer the question:

   'What are respectful ways for geographers to work with First People's cultural heritage?'

2. How could the information and sources in this section contribute to answering the overall inquiry question for this chapter? Be sure to directly refer to specific evidence as part of your answer.

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Reflect on your learning

1 Reflections are personal explorations. In this visible thinking routine, track the difference between what you knew about landforms and landscapes before starting this unit, and what new understandings you have acquired since doing this unit. Try to identify at least five different ways in which your thinking has changed. Using these stem sentences, write a paragraph to **explain** what you previously knew about landforms and landscapes, and another paragraph to **explain** what you now understand about the topic.
   - I used to think …
   - Now I understand …

2 In small groups, use resources from this chapter to **create** a detailed mind map on how First Nations peoples sustained the environment for thousands of years. You may want to use a mix of words, symbols and drawings in your mind map. Using your group's mind map, write a short paragraph about one particular aspect (such as fire management or bush food). Share your paragraph with your group and **discuss** how the practices of ancient First Nations peoples can be valuable today.

3 What has been the most important thing you have learned in this chapter? Everyone will have a different response!

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End-of-chapter assessment

1 Project

Investigating landscapes and landforms

A project assesses students' responses to a single task, stimulus, question, situation or scenario that gives students authentic opportunities to demonstrate their historical knowledge, understanding and skills.

Using additional background research, create a short presentation (two to three minutes) in response to the question: 'What does it mean to manage a landscape or landform in a sustainable manner?'

Hint: students would want to consider the importance of both geomorphological and human factors as part of their answer. Teachers might like to direct students towards the United Nations 17 Sustainable Development Goals for further ideas.

2 Research

An investigation assesses students' abilities to identify, select, analyse, organise and draw conclusions about evidence from primary and secondary sources.

Using information and evidence from this chapter, and additional research, create a short presentation (two to three minutes) about one iconic landform or landscape. Research your choice to discover:

- The type and location
- Why it is iconic
- The processes that shaped it
- Human uses that have degraded or protected it
- Significance for different people.

Present your research digitally or as a poster or brochure. Include at least one map and other pictures, illustrations or diagrams.

3 Investigation

Developing an evidenced-based opinion

In recent years there has been much discussion in Australia around how to balance the cultural concerns of First Nations peoples with other uses of landscapes. In the media there was much discussion when the climbing trail to the summit of Uluru was closed forever in 2019. Since then, there has been further moves to close the walking or climbing trails of other significant landforms such as the peaks of the Glasshouse Mountains on the Sunshine Coast, or Wollumbin-Mt Warning in northern New South Wales. Another example students have studied in this chapter is the removal of the sacred trees of the Djab Wurrung people to build a highway.

Students undertake an investigation into these and other related issues. Have a class discussion around how the concerns of First Nations peoples should be considered in cases like road projects in Victoria, or tourist accessibility such as walking trails. Perhaps invite a local Elder to come and share their views on similar issues in your local area.

Digital resources

Visit the Interactive Textbook or Online Teaching Suite to access:

- General Capability Project
- Interactive chapter quiz
- Interactive Scorcher quiz
- Videos, image galleries and other extra materials.

SCORCHER

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UNIT

2

Changing nations

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Overview

In 1960, roughly one-third of the global population lived in cities. This had increased significantly to 56 per cent in 2020 and is projected to rise even further to 68 per cent by 2050. As people are drawn to cities for better employment opportunities and facilities, cities are growing to unprecedented sizes. According to the United Nations, there were 34 megacities in 2020, which housed 7 per cent of the world's population. The largest of these was Tokyo with more than 38 million people, although this is expected to be overtaken by Delhi by 2030. Managing these changes in terms of housing availability, employment and population growth is an increasing challenge.

This unit explores the geographic processes of urbanisation and migration as well as the factors that drive these processes. You will investigate case studies in Australia, Indonesia, China and the United States in order to understand the consequences of urbanisation and explore some of the ways in which these impacts are managed. You will also study the factors leading to international and internal migration and the associated social, economic and environmental impacts. By combining this knowledge, you will consider future challenges involved in managing Australia's urban future and the strategies seeking to ensure this future is sustainable.

Learning goals

After completing this unit, you should be able to answer these questions:

- What are the causes and consequences of urbanisation?
- What are the reasons for and effects of international migration?
- What are the reasons for and effects of internal migration?
- What will be some of the challenges of managing and planning Australia's urban future?

Introducing geographical concepts and skills: *space, change* and *interconnection*

Throughout this unit there will be a focus on developing your understanding of space, change and interconnection. In geography, space refers to the spatial distribution of places, characteristics within places and other phenomena – in other words, the ways in which things are arranged. Geographers use maps and various forms of spatial technology to examine and compare spatial distributions. When comparing maps of different time periods, the change in distribution can be examined. Changes occur at a variety of spatial scales such as local, national and global. They can also occur at a range of temporal (time) scales and are often projected to enable planning for future changes. An example of a change is urban development and the spread of a metropolitan region into what was previously a rural area.

◄ **Figure 5A** An aerial view of Tokyo. Tokyo has many skyscrapers to accommodate its large urban population.

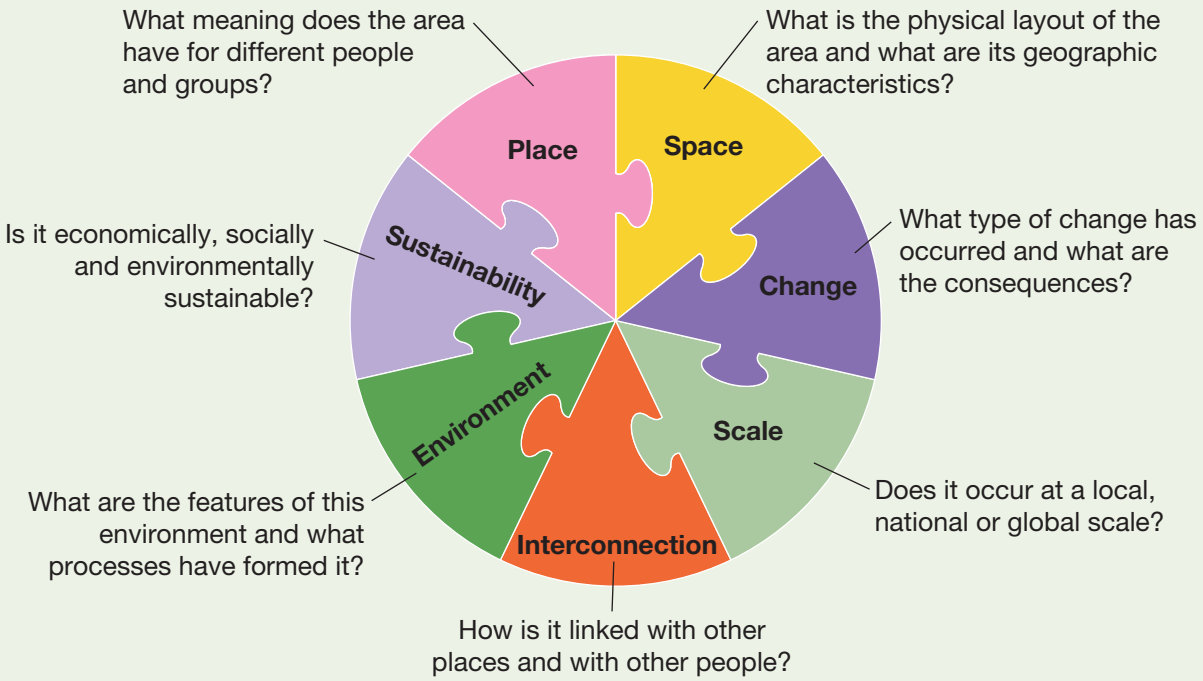
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Interconnection involves the links between places and the influences that people have on the characteristics of places. People are interconnected with places in the ways that they create, change and manage them. Australia has a rich history of migration. Each wave of migrants has brought food, customs and language that have contributed to Australia's unique culture.

Although this unit has a specific focus on space, change and interconnection, these concepts are part of a group of seven interrelated key ideas that help us to think geographically.

Geographic concepts



▲ **Figure 5B** Adapted from ACARA, 'Understand this learning area: Geography 7–10', Australian Curriculum: Geography V9.0

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CHAPTER 5: Changing nations

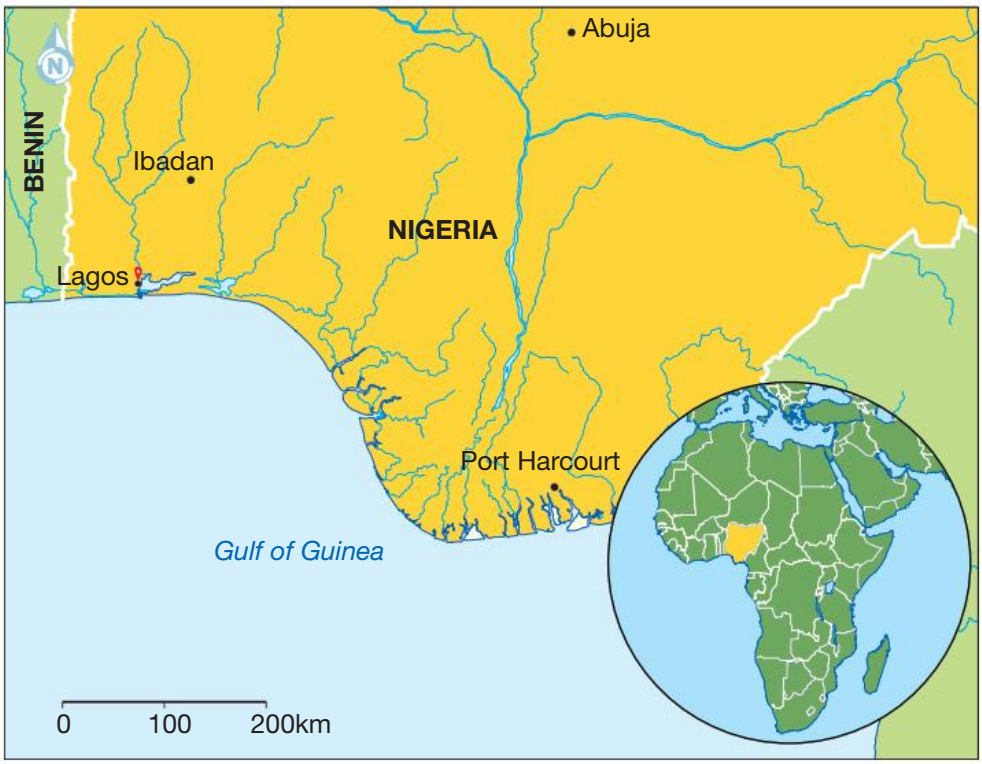
Setting the scene: the explosive urbanisation of Africa

Africa's population is projected to nearly double over the next 30 years from 1.35 billion in 2020 to 2.5 billion by 2050. Most of this growth will occur in Africa's urban areas. In fact, over this period, Nigeria's urban population alone is expected to grow by 189 million people. That's seven and a half times the size of Australia's population! This will certainly create enormous challenges within cities that are already struggling to manage their explosive growth.

urban relating to a large town or city

megacity a very large city with a population of over 10 million people

Lagos is a city in south-western Nigeria, Africa's most populated country. It covers more than 1000 square kilometres. During the 1960s, it was a small coastal town with a population of just 200 000 people, similar in population to Townsville. Since then, it has grown at an unprecedented rate to become what is currently one of the largest **megacities** in the world. Official estimates of the population of Lagos in 2020 vary from anywhere between 13 and 17 million. However, when including the entire metropolitan region, the population exceeds 21 million.



◄ **Figure 5.1** The location of Lagos within Nigeria, Africa

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The rapid growth and enormous size of Lagos have led to a range of challenges. While the population continues to increase, the infrastructure needed to support these people simply cannot keep up. Residents face crippling traffic, poor public transport and inadequate waste management. While a small number of the population of Lagos are incredibly wealthy, most people are battling poverty and unemployment. Millions of people live in **slums**, which are very densely populated regions on the outskirts of the city where there is limited access to piped water, **sanitation** or reliable electricity. Makoko is a slum located on the waterfront of Lagos where houses made of scraps of wood and corrugated metal are elevated on stilts in an attempt to protect against flooding.

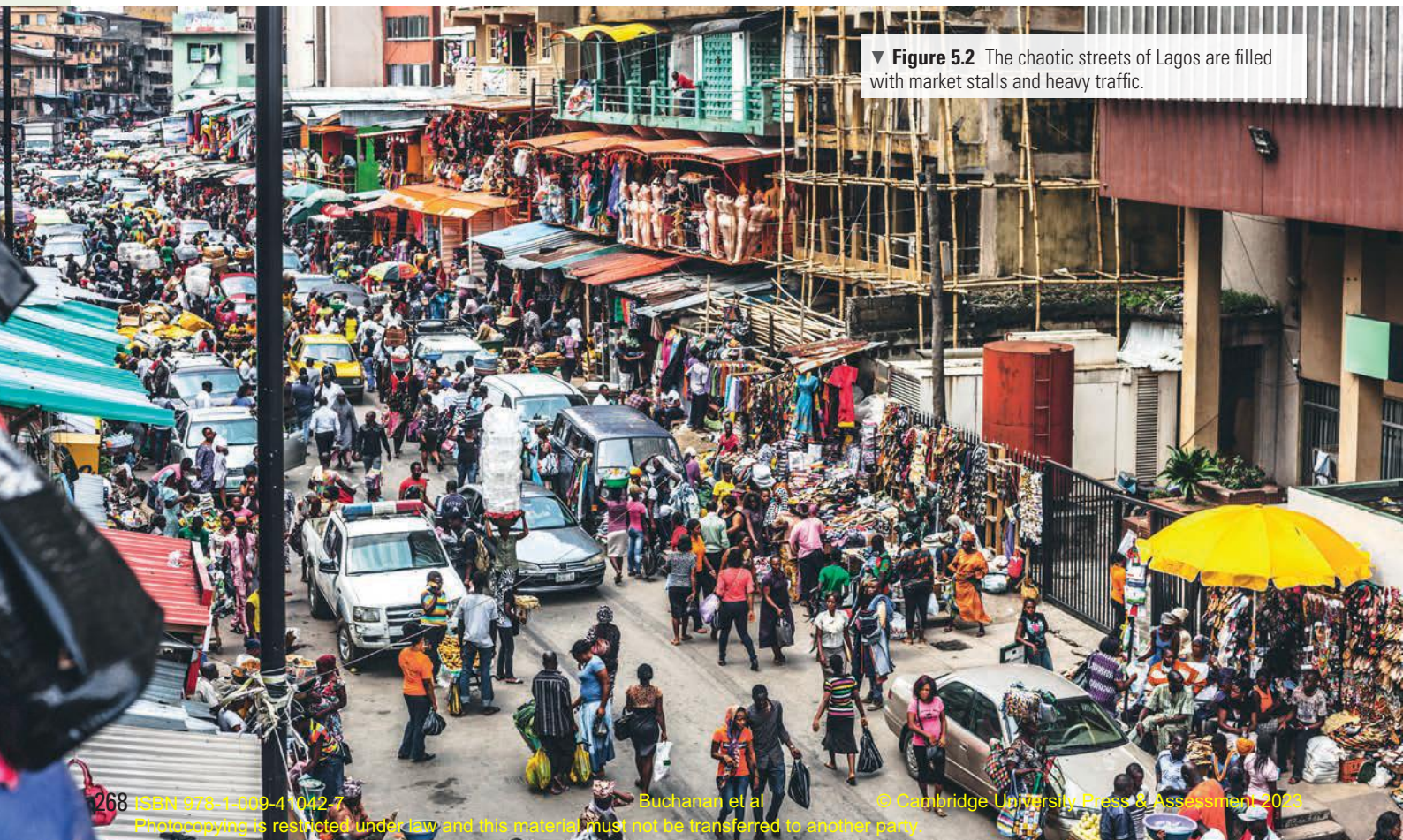
slums dense informal settlements in urban areas where residents do not have a legal claim to their land

sanitation access to clean drinking water and adequate sewage disposal

In 2020, the annual growth rate of the total population in Lagos was 3.34 per cent. This translates to a growth of approximately 1200 people per day. This trend is expected to continue, which will make Lagos the third-largest city in the world by 2050 and possibly the largest by 2100 with as many as 100 million people! This growth is unsustainable, meaning it cannot continue at its current rate without causing a range of economic, environmental and social impacts. Nigeria is hoping that the rapid growth of young people in Lagos will eventually drive economic growth, as there will be a lot of people of working age. This has the potential to increase productivity in many industries and help the region break out of poverty.

Interesting fact

Less than 10 per cent of people in Lagos live in homes with sewer connections, and less than 20 per cent have access to piped water.



▼ **Figure 5.2** The chaotic streets of Lagos are filled with market stalls and heavy traffic.

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▲ **Figure 5.3** Google Earth Pro can be used to view satellite images that depict the expansion of Lagos from 1988 (top) to 2020 (bottom).



▲ **Figure 5.4** Dilapidated buildings sit alongside a modern skyline, Lagos.

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▲ **Figure 5.5** Makoko is a slum located on the waterfront, and partly on the water, of the Lagos Lagoon.

ACTIVITY 5.1
MAKING THINKING VISIBLE

Think, puzzle, explore

1 **Describe** why you think Lagos has grown so rapidly.
2 **Explain** what you find interesting about this place.
3 Explore Lagos using Google Earth, Google Street View and by researching its history.
4 **Compare** Lagos with your local town or city.

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Chapter overview

Introduction

Migration, along with births and deaths, determines changes to a population. This includes the number of people in a population, its average age and the way in which it is arranged within a country. The movement of people over time has led to the development of cities and urban areas. This includes large towns, small cities, and cities containing millions of people. Urban areas are places that have been highly modified by people to the point where their original environment is largely unrecognisable. This chapter explores the growth of urban areas and the geographic process known as migration. It considers the different ways in which cities grow, the range and types of migration, the challenges in managing cities and the positive and negative impacts of migration.

Learning goals

After completing this chapter, you should be able to answer these questions:

- What is urbanisation?
- What are the causes and consequences of urbanisation?
- What is urban concentration?
- What is the spatial distribution of urban populations?
- What are the consequences of different urban concentrations?
- How do urban settlement patterns vary and what impacts does this have?
- What is internal migration?
- What impacts do internal migration have in Australia and China?
- What is international migration?
- Why are migrants entering Australia and what effects is this having?
- What challenges does Australia face in managing its urban future?

Geographical skills

After completing this chapter, you will be able to demonstrate the following skills:

- **Use** your knowledge and understanding of geographic terms, concepts and processes
- **Develop** relevant questions about urbanisation and migration
- **Use** primary research methods and secondary research materials
- **Collect**, **organise** and **represent** data and information about urbanisation and migration
- **Explain** patterns, trends and relationships about urbanisation and migration by interpreting and analysing data and information
- **Identify** and **explain** the impacts of urbanisation and migration.
- **Propose** appropriate strategies to address the challenges of urbanisation and migration.

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5

5.1 Causes of urbanisation and its impacts on places and environments

FOCUS QUESTIONS

- What is urbanisation?
- What are the causes and consequences of urbanisation?

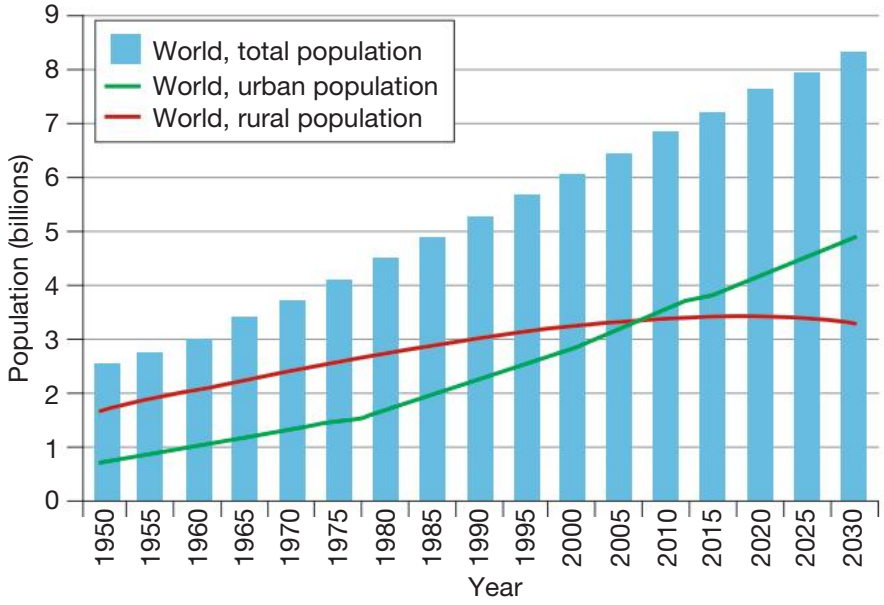
What is urbanisation?

In 2007, for the first time in human history the amount of people living in urban areas and rural areas was equal, both at approximately 3.33 billion people (see Figure 5.6). Since then, population growth in urban areas has continued to increase rapidly while the growth in rural areas has slowed. Cities have expanded both in **population** size and **population density** and in 2020, accommodated 55 per cent of the global population. The United Nations predicts that this trend will continue and that the proportion of those living in urban areas in 2050 will reach 68 per cent. Figure 5.6 indicates that by 2030 most of the world's population will be living in cities. This increase in the proportion of people living in urban areas compared to rural areas is known as **urbanisation**. Figure 5.7 shows a global map of urbanisation in 2022. Countries are categorised as either majority urban or majority rural. This means over 50 per cent of the population live in urban areas, or more than 50 per cent of the population live in rural areas.

population the amount of people living in an area

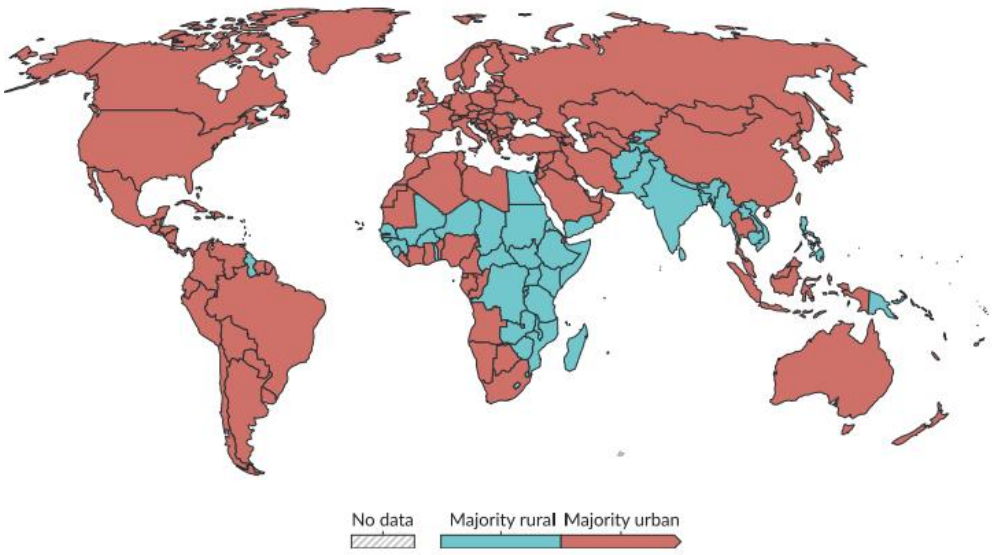
population density the amount of people per square kilometre

urbanisation the increase in the proportion of people living in urban areas compared to rural areas



▲ **Figure 5.6** The change in the number of the world's population living in rural and urban areas, with projected numbers for 2020 to 2030

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▲ **Figure 5.7** Breakdown of global population as being majority rural or urban



▲ **Figure 5.8** Delhi, India, is one of the fastest growing cities in the world, with the population increasing by 79 people per hour.

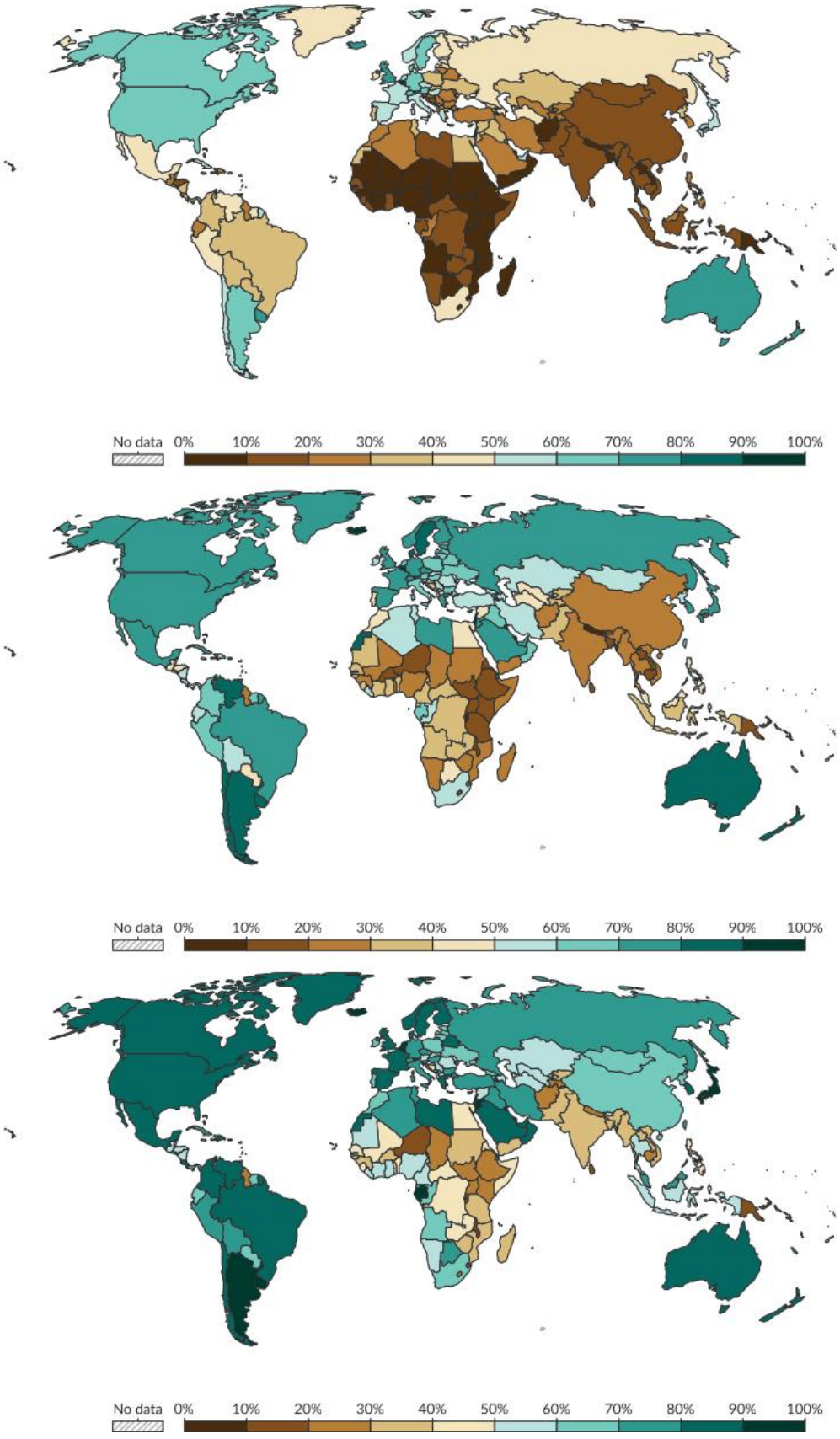


▲ **Figure 5.9** Tokyo, Japan, is the largest city in the world by population, with more than 38 million people.

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▲ **Figure 5.10** The proportion of people living in urban areas in 1950 (top), 1990 (middle) and 2020 (bottom)

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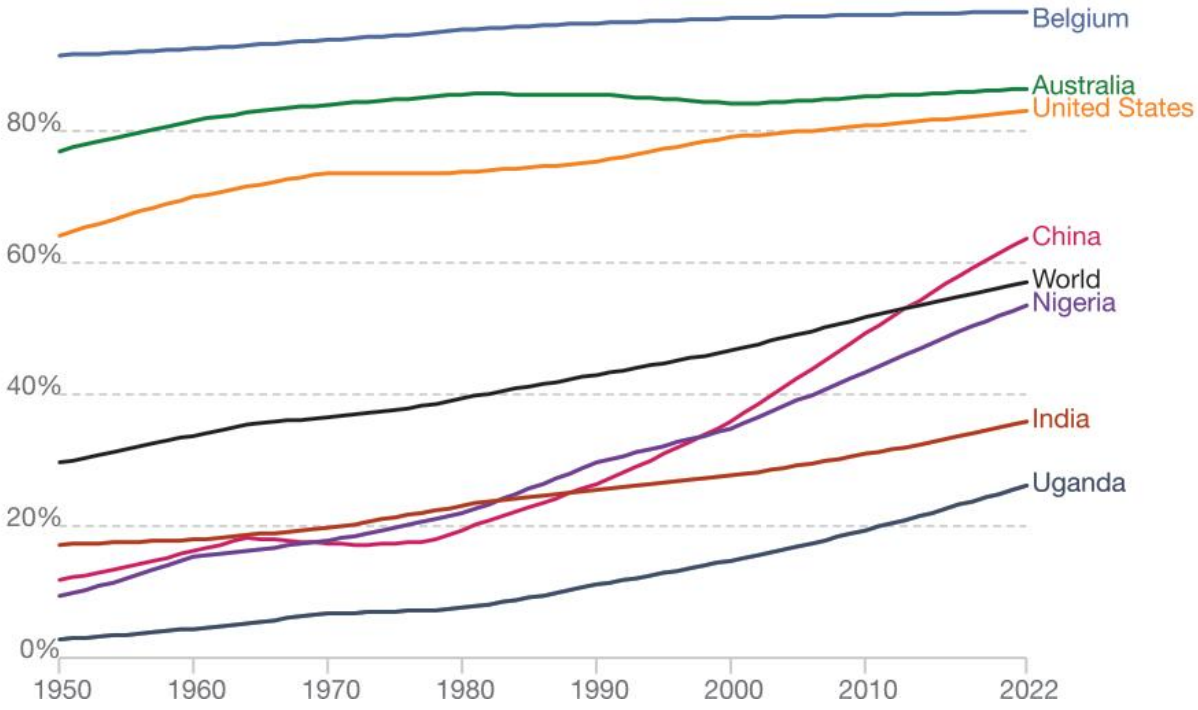
ACTIVITY 5.2

Analysing urbanisation data

1 Refer to Figure 5.6 and **describe** how the number of people living in urban and rural areas has changed since 1950 and how it is expected to change by 2030.

2 Figure 5.10 shows a change in the proportion of people living in urban areas for each country. **Examine** the maps in this figure and answer the following questions:
   - **a** **Identify** which regions of the world were the most urbanised in 1950.
   - **b** **Identify** any countries that stood out as being more or less urbanised than neighbouring countries.
   - **c** **Describe** which regions have had a large change in the proportion of the population living in urban areas. Refer to specific countries and approximate percentage changes.
   - **d** **Describe** regions of the world that still have a large proportion of the population living in rural areas.

Although urbanisation is a global trend, the rate at which it is occurring varies significantly. Figure 5.11 shows the trend at which seven countries are becoming urbanised compared with the global trend. Many countries that already had highly urbanised populations over the past few decades, such as Australia and the United States, have shown little change. However, many countries that had predominantly rural populations during most of the twentieth century, such as Uganda, are becoming rapidly urbanised. Table 5.1 lists the 10 countries with the highest and lowest rates of urbanisation between 2015 and 2020. This refers to the percentage change of the size of the urban population over this five-year period. Negative values refer to countries where the urban population is decreasing.



▲ **Figure 5.11** The rate at which countries are becoming urbanised compared with the world trend

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▼ **Table 5.1** The countries with the highest and lowest average rates of urbanisation

Highest 10	Rate (%)	Lowest 10	Rate (%)
Uganda	5.70	Latvia	–0.93
Burundi	5.68	Samoa	–0.47
Oman	5.25	Romania	–0.38
Tanzania	5.22	Ukraine	–0.33
Burkina Faso	4.99	Andorra	–0.31
Mali	4.86	Lithuania	–0.31
Ethiopia	4.63	Poland	–0.25
Congo	4.53	Bulgaria	–0.22
Madagascar	4.48	Puerto Rico	–0.14
Bahrain	4.38	Japan	–0.14



ACTIVITY 5.3

Analysing the rate of urbanisation

Figure 5.11 shows the rate at which seven countries are becoming urbanised, as well as the globalised rate. Use the information in the graph to answer the following questions.

1 **Identify** which countries have the highest and lowest proportion of their populations living in urban areas in 2020.
2 **Identify** the country that has shown the fastest rate of urbanisation since 2000.
4 **Identify** and **explain** some issues that might be facing the populations in Belgium, China and Uganda. In your response, make sure you consider the population size and geographic size for each country.
5 Table 5.1 lists the 10 countries with the highest and lowest rates of urbanisation. **Use** the table as a starting point to complete the tasks below.
   - **a** Using an atlas or Google Maps, **describe** the location of the countries with the highest urbanisation rates.
   - **b** **Investigate** whether or not there is a clear pattern in the location of countries with the lowest rates of urbanisation. If you find a pattern, **suggest** a reason for this.
   - **c** **Research** and **compare** the changes that you think would be happening in countries such as Uganda and Latvia to accommodate changes to their urban populations.

What are the causes of urbanisation?

NATURAL POPULATION GROWTH

natural population growth the difference between the numbers of people who are born and who die in a population

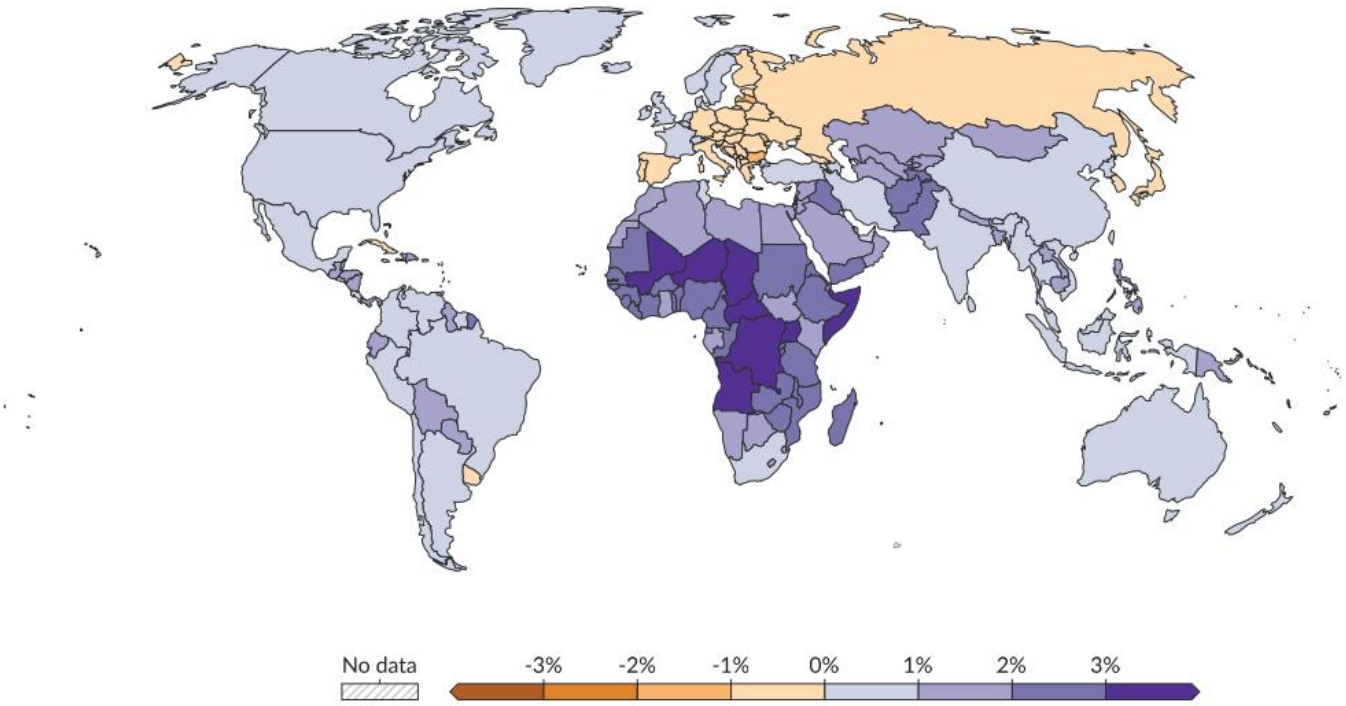
There are two main reasons why urban areas are growing. The first relates to natural population growth. **Natural population growth** is the difference between the numbers of births and deaths within a population. This means more people are being born than are dying. This does not take into account those who move into or out of an area, a process known as migration. The 10 countries with the highest urbanisation rates (Table 5.1) are also countries with very high levels

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of natural population growth (see Figure 5.12). For example, Uganda and Burundi both have a population growth rate above 3.2 per cent, placing them in the top five in the world. Improvements in living conditions within urban areas mean the **death rate** is lower than in rural areas, while the **birth rate** remains quite high. This means that the majority of natural population growth occurs within urban areas, contributing to the rate of urbanisation.

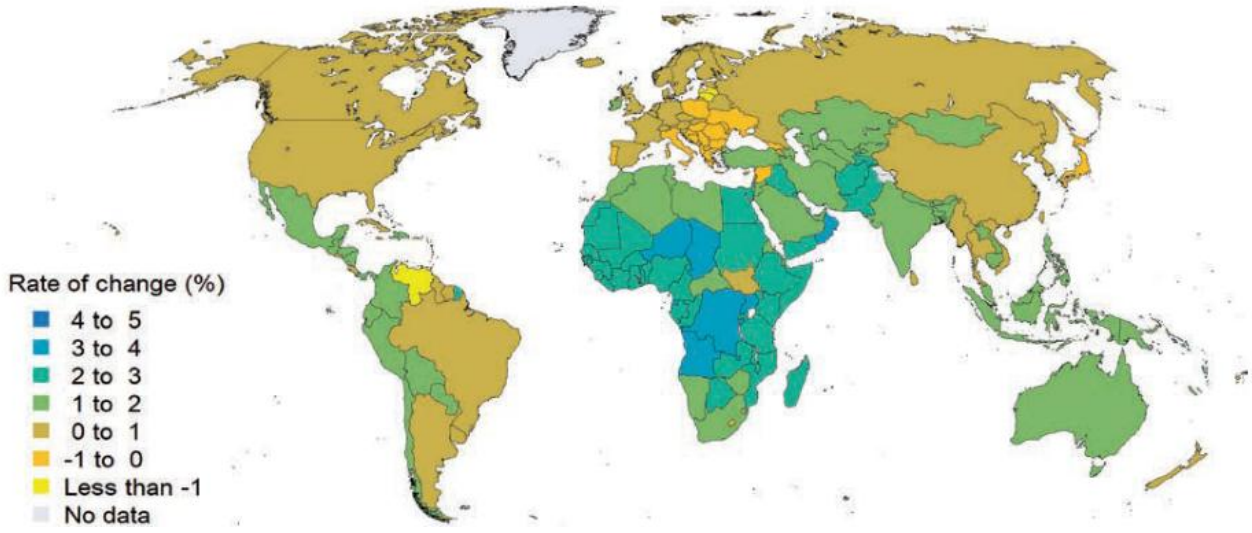
death rate the number of people who die per year in a population per 1000 people

birth rate the number of people born per year in a population per 1000 people



▲ **Figure 5.12** The natural population growth rate of countries around the world in 2022. Negative values refer to places where the number of deaths is greater than the number of births.

Source: United Nations – Population Division (2022 Revision)



▲ **Figure 5.13** The urban population growth rates between 2015 and 2020

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ACTIVITY 5.4
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Describing the spatial association between two phenomena

Describing the **spatial association** between two phenomena is an important part of understanding the relationship between them. It involves looking at two maps of the same scale and analysing how similar or different their spatial distributions are. In other words, are they arranged in the same way? A spatial association can be described as strong if the two maps have a very similar distribution, moderate if the distribution matches in some regions but not others, and weak if the two maps do not appear to have much of a relationship.

spatial association the degree to which two or more phenomena have similar spatial distributions

When describing spatial association, there are three important things to include: the degree of association, quantification and an exception. This is also known as the DQE method. Use at least one sentence to **describe** each of these:

- *Degree:*
  - Give a general overview of the degree of association.
  - Is there a strong, moderate, weak or no degree of association between the two phenomena? Does the distribution pattern of each map look similar or different? If it is very similar then you would say the degree of association is strong, if it is a little similar you would say the degree of association is moderate, and if it is not at all similar then the degree of association is weak.
- *Quantification:*
  - Provide specific evidence to demonstrate the association.
  - Examples of specific evidence would include specific data and locations to support your argument.
- *Exception:*
  - **Identify** an example or several examples of specific places that do not fit the pattern of association.
  - Even if the spatial association is strong, it is still possible that there is at least one exception. Try to locate, name and **describe** the exception.

Using Figure 5.12 and Figure 5.13, **describe** the spatial association between natural population growth and urbanisation rate.

RURAL TO URBAN MIGRATION

The second main cause of urbanisation is rural to urban migration. This refers to the rate at which people are moving from rural areas to urban areas. The reasons why people migrate are known as push and pull factors. Push factors are the reasons why people choose to leave and pull factors attract people to a particular place. Table 5.2 summarises some of the push and pull factors that cause people to migrate from rural to urban areas within a country.

▼ **Table 5.2** Push and pull factors leading to rural to urban migration

Push factors	Pull factors
• Limited employment opportunities and high levels of unemployment • A lack of essential services such as reliable water and electricity supplies and sanitation • Basic health and educational facilities • Social isolation and loneliness • Forced migration due to urban expansion into rural areas	• Employment opportunities • Higher standards of living • Better health facilities • Better educational opportunities • Social connectedness • Improved access to entertainment and recreational activities

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ACTIVITY 5.5

Ranking factors

Rank the push and pull factors listed in Table 5.2 from the one that you think would have the biggest impact on a person's choice to move from a rural to urban area, to the one you think would have the smallest impact. **Compare** your rankings with a classmate and **justify** your opinion.

Unfortunately for many, the perception and reality of city life do not necessarily match. Rapid rates of urbanisation coupled with high population densities mean that residents in many cities face high levels of unemployment. While many are lured to the entertainment opportunities that cities provide, others prefer the cheaper housing and more relaxed lifestyle of rural living, leading to **counter-urbanisation**. This process has been observed in Australia during the COVID-19 pandemic.

counter-urbanisation the movement of people from urban areas to surrounding rural areas

Interesting fact

In 2018, more than 25 million people applied for 90 000 jobs with India Railways, and 200 000 people applied for 1137 jobs in the Mumbai Police.

Urbanisation in Dubai

Improvements in technology and engineering is another factor that is contributing to increased urbanisation, as cities have been constructed in some of the most inhospitable environments. Dubai is the largest city in the United Arab Emirates and is growing rapidly, increasing from 500 000 in 1990 to more than 2.9 million in 2020. This is especially significant considering Dubai's desert climate consisting of high temperatures, strong winds and lack of water. Figure 5.14 shows the extent of Dubai's development using satellite imagery. Since 2000, the cityscape has expanded up to 20 kilometres inland from the coast of the Persian Gulf. The desert has been filled by buildings and roads, while sand removed from the sea floor has been used to create artificial islands designed in the shape of palm trees.



▲ **Figure 5.14** Satellite imagery showing urban development in Dubai from 1990 (top) to 2019 (bottom)

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▲ **Figure 5.15** Dubai's skyscrapers now dominate a landscape that was desert only a few decades ago.

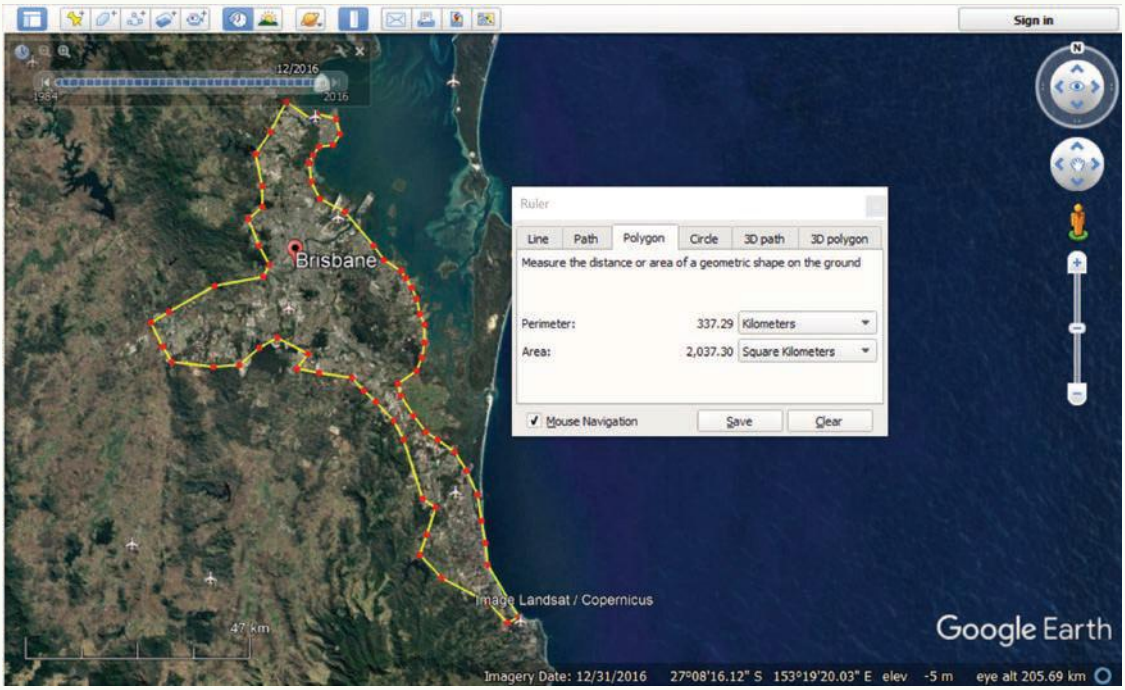
ACTIVITY 5.6
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Exploring historic satellite imagery using Google Earth

Google Earth Pro is a free program that enables you to explore satellite imagery of any corner of the globe. Geographers can use this spatial technology to investigate the geographic characteristics of places such as land cover (e.g. forest, bare ground, agriculture, urban) and to perform **analysis** such as measuring distances and area (as you can do in Google Earth Pro – see Figure 5.16). The Historical Imagery function can be used to change the date of the satellite image. This enables you to track changes over time, which is very relevant to the study of urbanisation. Figure 5.14 is an example where satellite imagery has been used to track the progress of urban development in Dubai. Download and install Google Earth Pro to your computer, and then follow these steps to **explore** changes in an urban environment:

1. Choose a city that has undergone recent expansion; for example, Lagos, Las Vegas, Shanghai or even the outskirts of Australian cities such as Melbourne or Brisbane.
2. Use the Historical Imagery slider to move back in time as far as possible. Depending on where and how far you are zoomed in, this might be as far back as 1984.
3. Record how the characteristics of the place have changed over this period. Refer to specific parts of your chosen city and the specific changes that have taken place.
4. Select the Ruler tool and the Polygon tab. Use this tool to trace around the city boundary at two different time periods and calculate how much the city has grown in size during this time.

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▲ **Figure 5.16** The Historical Imagery and Ruler functions can be used in Google Earth Pro to calculate the change in the size of cities such as Brisbane.

Consequences of urbanisation

Urbanisation can lead to a variety of positive and negative consequences. Table 5.3 lists some of these, although the extent to which they impact a population will vary between cities and will depend on how they are managed.

▼ **Table 5.3** Some of the positive and negative consequences of urbanisation

Positive consequences	Negative consequences
• Dense urban environments can have environmental benefits as travel is more efficient and surrounding land can be reserved for **conservation** • Urban areas in wealthy nations are more likely to have better healthcare facilities than in rural areas • The economy in urban areas is often based on manufacturing and services, which are more profitable than agriculture • Residents in urban areas have greater access to a variety of higher paying jobs • The provision of infrastructure is often cheaper and more efficient in denser regions	• The growth of cities leads to a loss of habitat and a subsequent loss of animal and plant species • High population densities can increase the spread of infectious diseases such as malaria and tuberculosis • Inequality can develop, as those living closer to a city centre have better access to infrastructure, facilities and employment than those living on the outskirts • High population densities lead to traffic congestion, and noise and air pollution • Infrastructure development in rapidly growing cities can struggle to keep up with demand • Waste management is a constant challenge and can have further environmental and social impacts

conservation the protection of the natural environment

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ACTIVITY 5.7

Classifying impacts

Classify each of the impacts of urbanisation listed in Table 5.3 as either environmental, economic or social. Environmental consequences refer to changes in either the natural or human environments, social consequences refer to impacts on people and society, and economic consequences refer to impacts involving finances.

Interesting fact

According to the World Health Organization, three million deaths every year are linked to exposure to air pollution.

correlation an association or relationship between two phenomena

gross domestic product (GDP) per capita a measure of the strength of a country's economy per person

industrialisation the shift of a country's economy from one based primarily on agriculture to one based on manufacturing

exporting sending goods to another country for sale

Urbanisation and economic growth

Figure 5.17 shows a **correlation** between the percentage of a country's population that is urbanised and **gross domestic product (GDP) per capita**. Countries with a high level of urbanisation also tend to have a stronger economy. However, this does not necessarily mean that urbanisation causes economic growth. Rapid urbanisation in China has coincided with **industrialisation**. Rural areas have supplied Chinese cities with a massive workforce, allowing it to become the largest manufacturing and **exporting** nation in the world. The story is very different in many African cities, where urbanisation has been very rapid and industrialisation has not been able to keep up. This has led to the development of slums.



▲ **Figure 5.17** The relationship between the percentage of a country's population that lives in urban areas and its GDP per capita
Source: Gapminder. To interact with this map, go to https://cambridge.edu.au/redirect/10254

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ACTIVITY 5.8

Analysing the relationship between variables

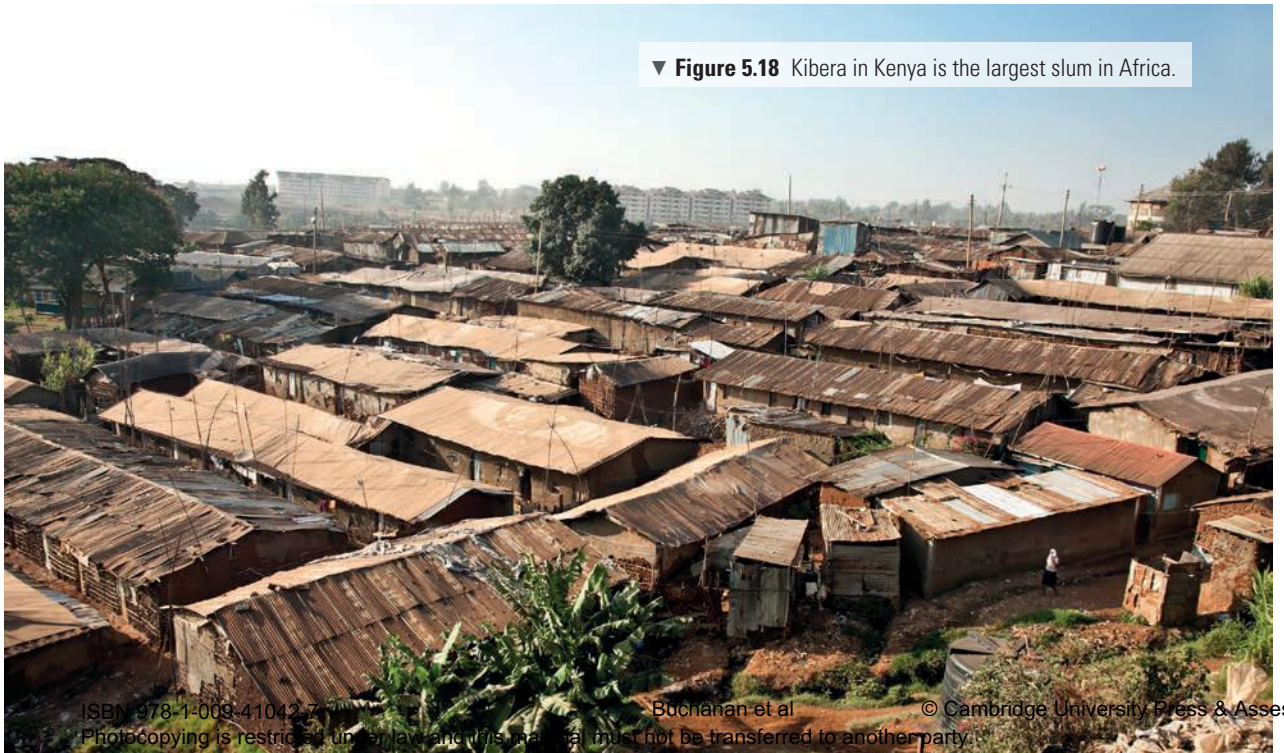
Visit the Gap Minder website. Scroll down to *Animating Data*, click on 'Understanding a Changing World'.

1. Change the *x* (horizontal) and *y* (vertical) axes to match those in Figure 5.17.
2. Hover your mouse over the different circles to get the names of the different countries represented. **Identify** three countries with high levels of urban population and GDP per capita and three with low levels.
3. **Interpret** what this graph reveals about the relationship between urbanisation and a country's economy.
4. Click on the Play button at the bottom of the page and observe the changes over time.
5. Change the *x* and *y* axes to other variables that you are interested in and **describe** their relationship.

SLUMS

Slums are informal settlements where residents do not have legal ownership of the land. They are usually located on the outskirts of cities or on less economically valuable land and consist of densely packed and unstable housing that is built using scrap materials. They often lack basic services such as piped water, sanitation, electricity and transport infrastructure. They are also unsafe and vulnerable to fire and flooding. In African cities, 62 per cent of people live in slums and this number is expected to grow. Kibera, Kenya, is Africa's largest slum, and is estimated to be home to anywhere between 500 000 to 1 million people. The average shack in this region is 12 square metres (a similar size to an average Australian bedroom). They are made of mud walls, dirt floors and a roof of corrugated metal sheets, and will often house a family of eight.

▼ **Figure 5.18** Kibera in Kenya is the largest slum in Africa.



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▲ **Figure 5.19** Slums often lack stable housing, piped water and sewerage systems.

DEVELOPING YOUR UNDERSTANDING 5.1

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 Define the following terms:
   - **a** Urban
   - **b** Rural
   - **c** Urbanisation
   - **d** Population density
   - **e** Natural population growth
   - **f** Rural to urban migration.

2 **Explain** the two main causes of urbanisation.

3 **Identify** at least three positive and three negative consequences of urbanisation.

Interpret

4 **Explain** the link between urbanisation and natural population growth.

5 **Explain** the relationship between urbanisation and gross domestic product per capita.

6 **Select** one of the urban areas discussed in this section of the chapter and **conduct** further research to find out what life is like there. **Compare** this urban area with your local area.

Argue

7 'Urbanisation always has positive consequences for local populations.' **Evaluate** this statement and **discuss** whether you agree with it. **Organise** your arguments by referring to specific examples.

8 **Propose** an example demonstrating how poor land management in urban areas can have negative consequences.

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5

5.2 Differences in the distribution of urban settlements and urban concentration in Australia and the United States and their implications

FOCUS QUESTIONS

- What is urban concentration?
- What is the spatial distribution of urban populations?
- What are the consequences of different urban concentrations?
- How do urban settlement patterns vary and what impacts does this have?

While global trends show that the proportion of people living in urban areas is increasing, the extent of this growth, the sizes of the urban areas and ways that they are arranged vary significantly. In this section we will explore the consequences of various urban concentrations and settlement patterns and compare urban environments in Australia and the United States.

What is urban concentration?

Urban concentration is defined as the proportion of a country's population living in large cities. This can be difficult to measure since there is no specific definition for what a large city is. However, contrasting examples can help us to understand this concept. Ninety per cent of Argentina's population lives in urban areas. Thirty-five per cent of its 45 million people live in its three largest cities. Buenos Aires is Argentina's largest city with around 15.5 million people in 2023. Since a large proportion of Argentina's population live in three large cities, it is considered to have a high urban concentration. On the other hand, although 98 per cent of Belgium's population lives in urban areas, its most populous city, Antwerp, has only half a million people. Belgium's population is very evenly spread over many small cities. Therefore, although it has a large urban population, it has a low urban concentration.

urban concentration the proportion of a country's population living in large cities



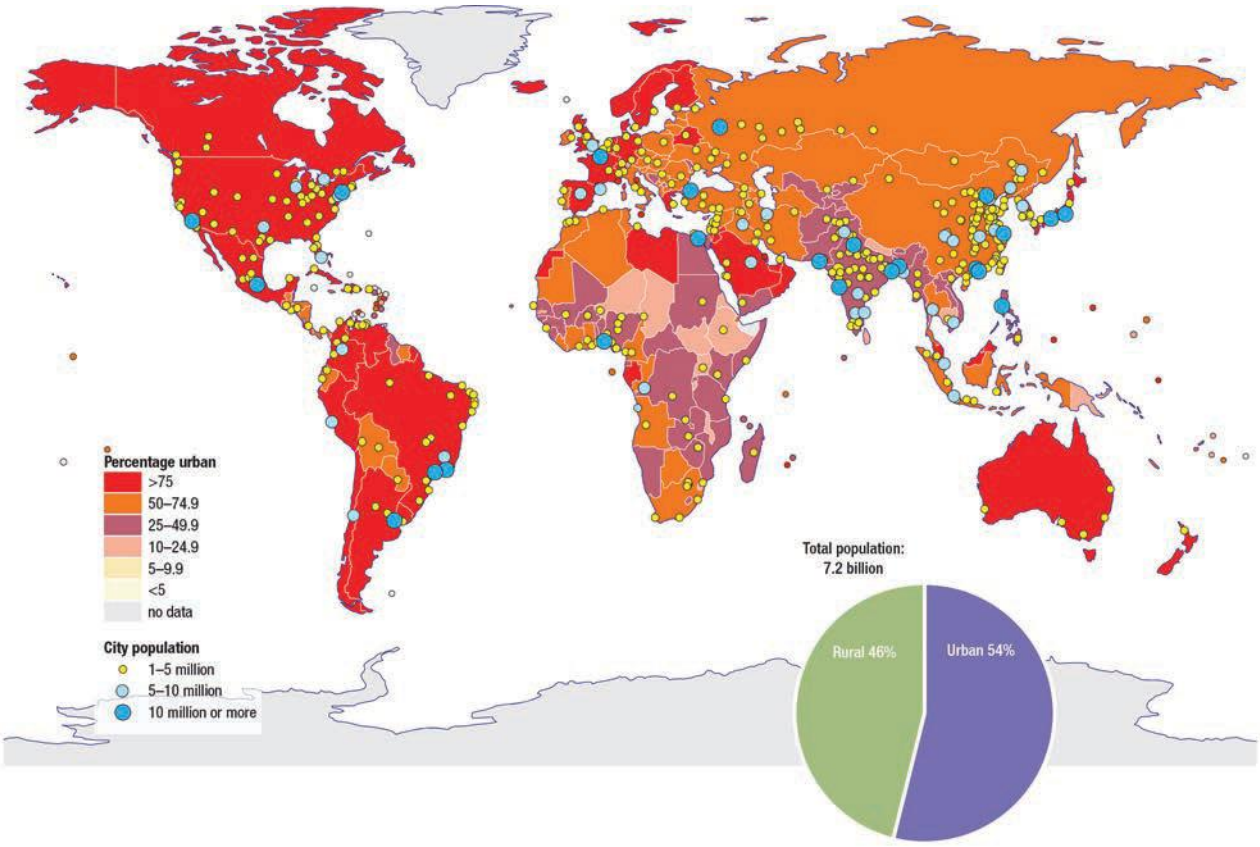
▲ **Figure 5.20** Buenos Aires in Argentina (top) and Antwerp in Belgium (bottom)

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THE SPATIAL DISTRIBUTION OF URBAN POPULATIONS

Geographers use maps to analyse the distribution of phenomena in space. In this context, space refers to spatial, and distribution refers to the way in which things are arranged. By analysing the spatial distribution of phenomena, geographers are able to find patterns. Figure 5.21 shows both the spatial distribution of urban populations and of large cities of varying sizes. Together this can help us to get a better understanding of which countries have high and low urban concentrations.



▲ **Figure 5.21** The spatial distribution of countries with high and low urban populations and large cities, 2014

ACTIVITY 5.9
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Describing spatial distribution using the PQE method

When describing the distribution of a phenomenon using a choropleth map, which is a thematic map showing interval data (generally using different shades of one colour), there are three important things to include: the pattern, quantification and an exception. This is also known as the PQE method. Use at least one sentence for each of these.

Pattern: Give a general overview of the distribution.

- Is the overall distribution even or uneven?
- Where are areas that have a high or low amount? Provide some examples.

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Quantification: Provide specific evidence to demonstrate the pattern. Use the legend and approximate areas using percentages.

- Roughly how much of the Earth has a high or low amount?
- What percentage of Africa has a high or low amount?
- How many European countries have this amount?

Exception: Identify an example or several examples of specific places that do not fit your pattern.

- Where is a place that has a high amount surrounded by places with a low amount?
- Where is a place that has a much higher or lower amount than anywhere else?

It is important not to give the reason for the distribution unless you are asked to suggest one. This information is not provided in the maps and would require additional research.

Referring to Figure 5.21, answer the following questions.

1 **Describe** the spatial distribution of countries that have more than 75 per cent of their populations living in urban areas.
2 **Identify** countries that have both a high urban percentage and contain large cities of at least one million people. These are countries that are likely to have a high urban concentration.
3 Using the data provided, **justify** whether or not there appears to be a link between countries that are highly urbanised and countries that contain large cities. **Explain** the reasons for your decision.

Megacities: high urban concentrations

A megacity is a very large city with a population of more than 10 million people. New York was the world's first megacity, reaching 10 million people in the 1930s. By 2020, there were 34 megacities across the world and another six are likely to reach 10 million by 2030. The data in Table 5.4 shows that megacities vary considerably in size but also with the percentage of the population that they contain. Megacities also vary in the rate at which they are growing and the wealth of the countries in which they are found. Large megacities located in poorer regions face enormous management challenges including:

- heavy traffic congestion
- poor air quality
- inadequate housing and sprawling slums
- poverty
- unemployment
- pollution and insufficient waste management
- overcrowded public transport
- **food insecurity**
- crime, violence and substance abuse.

food insecurity
unreliable access to a sufficient amount of affordable and nutritious food

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▼ **Table 5.4** Megacities across the world in 2022

City	Country	2022 Population (millions)	% of country's population
Hyderabad	India	10.5	0.7
Bangkok	Thailand	10.9	15.2
Lima	Peru	11.0	32.4
Paris	France	11.1	17.2
Jakarta	Indonesia	11.1	4.0
Bogota	Colombia	11.3	21.9
Chennai	India	11.5	0.8
Moscow	Russia	12.6	8.7
Shenzhen	China	12.8	0.9
Bangalore	India	13.2	0.9
Lahore	Pakistan	13.5	5.7
Rio de Janeiro	Brazil	13.6	6.3
Tianjin	China	14.0	1.0
Guangzhou	China	14.0	1.0
Manila	Philippines	14.4	12.5
Kolkata	India	15.1	1.1
Lagos	Nigeria	15.4	7.0
Buenos Aires	Argentina	15.4	33.8
Istanbul	Turkey	15.6	18.3
Kinshasa	DR Congo	15.6	15.8
Karachi	Pakistan	16.8	7.1
Chongqing	China	16.9	1.2
Osaka	Japan	19.1	15.4
Mumbai	India	21.0	1.5
Beijing	China	21.3	1.5
Cairo	Egypt	21.8	19.6
Mexico City	Mexico	22.1	17.3
São Paulo	Brazil	22.4	10.4
Dhaka	Bangladesh	22.5	13.1
Shanghai	China	28.5	2.0
Delhi	India	32.1	2.3
Tokyo	Japan	37.3	30.1



CASE STUDY 5.1

Jakarta: a sinking city

Jakarta is home to more than 10 million people and has been the capital city of Indonesia since 1961. However, in 2019, President Joko Widodo announced that the capital would be relocated to a new city to be constructed in Kalimantan, Borneo. It is expected to be finished by 2024 and will cost more than US$33 billion.

The reason for the move is because Jakarta is sinking. North Jakarta has already sunk 2.5 metres over the last decade, while the rest of Jakarta sinks between 3 and 15 centimetres each year.

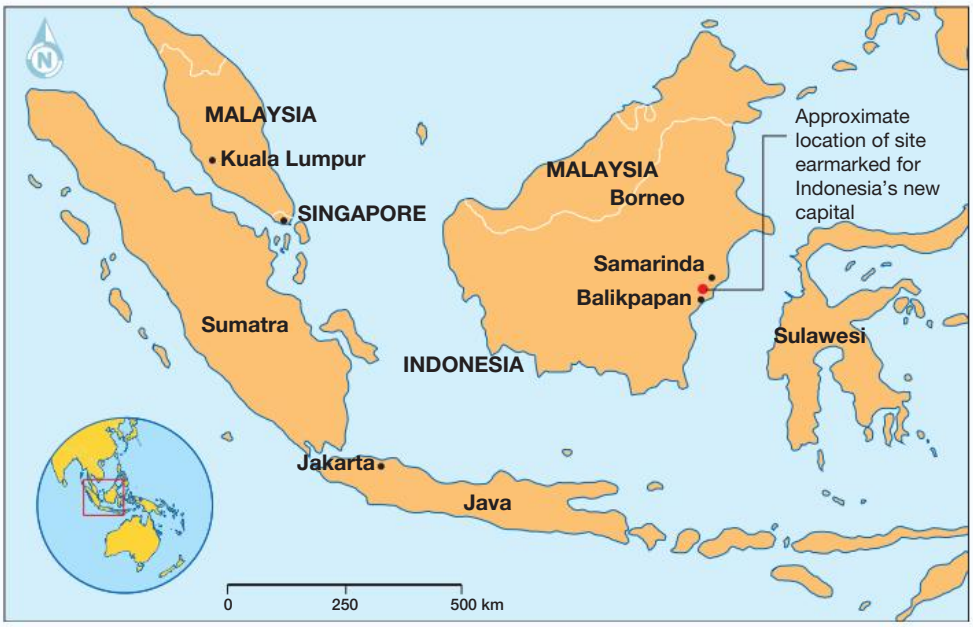
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About half of Jakarta currently sits below sea level, leading to frequent flooding, while modelling has projected that 95 per cent of the city could be underwater by 2050. It is likely that flooding and sinking will also damage Jakarta's drainage, piping and sewerage systems, which will intensify these effects.

The main cause of the sinking is the unsustainable rate of **groundwater** extraction. Half of Jakarta's households do not have piped water and so residents rely on water that is pumped from the **natural aquifer** that is beneath the city. Once this water is removed, land above it sinks in its place. With population growth and urbanisation, the problem is worsening. Although government restrictions on groundwater extraction have lessened the impact, illegal extraction and a lack of alternatives mean that sinking has not stopped. Although the capital is moving, Jakarta will remain Indonesia's business and finance centre, with the government pledging to spend US$40 billion to upgrade its infrastructure.

groundwater water located below the Earth's surface

natural aquifer an underground layer of rock and other material containing groundwater



▲ **Figure 5.22** The proposed location of Indonesia's new capital city



▲ **Figure 5.23** Flooding has become a common occurrence and a part of daily life for Jakarta's residents.

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▲ **Figure 5.24** Thousands of people evacuated Jakarta's central business district during a large flood in 2013.

landfill the disposal of waste by burying it in the ground

Waste management in São Paulo, Brazil, is an increasingly difficult problem to manage. **Landfill** sites are filling, meaning waste must be transported up to 30 kilometres for disposal.

This is significant, considering the city produces over 16 000 tonnes of waste each day! Improper disposal of waste is polluting local waterways, contaminating soil and increasing air pollution, all of which are affecting the health of São Paulo's 22 million+ residents.

▼ **Figure 5.25** São Paulo is the capital of Brazil



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▲ **Figure 5.26** Waste management is one of São Paulo's biggest management challenges.



▲ **Figure 5.27** Overcrowded trains are a daily reality in Mumbai, India.

ACTIVITY 5.10
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Representing data on a thematic map

Geographers use maps to represent information spatially. This can highlight trends and reveal connections between the physical and human environments. Thematic maps are used to represent a specific theme or subject area such as the location of megacities.

1 Using the data in Table 5.4 and a blank map of the world, **create** a thematic map showing the location of megacities. Represent megacities using symbols that are different colours or sizes to represent different populations. Proportional circles are commonly used to represent and quantify populations with larger circles indicating larger populations. Figure 5.21 is an example of this method. Ensure that your map contains all of the BOLTSS mapping conventions: border, orientation, legend, title, source and scale.
2 Using your map, **describe** the global distribution of megacities using the PQE method (see Activity 5.9).
3 Based on this distribution, **propose** three factors that determine where megacities are located.

What are urban settlement patterns?

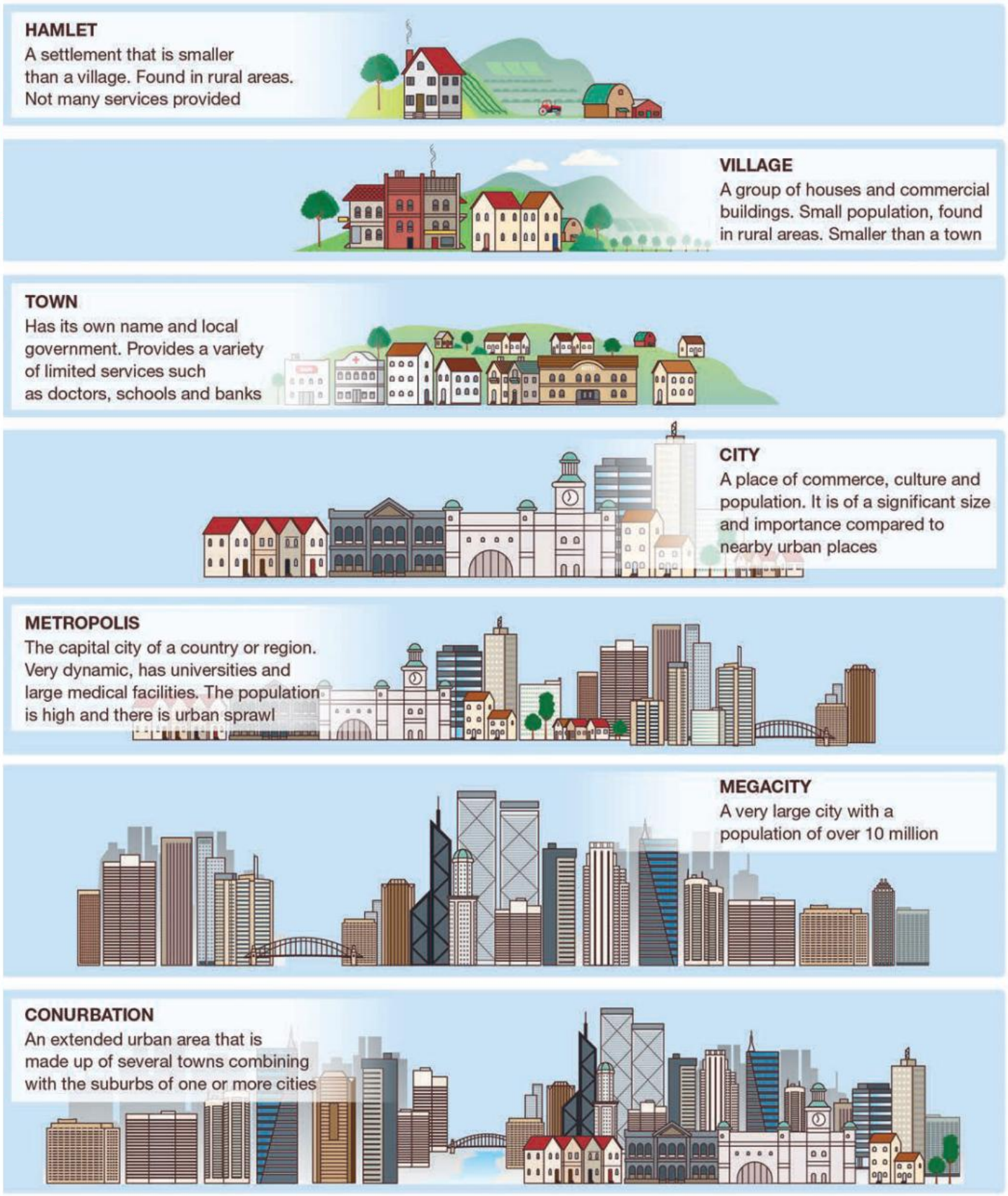
Urban settlements vary based on their scale. Figure 5.28 shows the variation in settlement size from a hamlet or village within a rural area through to large urban **conurbations** where a number of cities or towns have merged to form one interconnected and continuous urban environment. China contains three main conurbations. The Yangtze River Delta is home to 150 million people and encompasses cities such as Shanghai, Nanjing, Hangzhou and Ningbo. Urban settlement patterns refer to the ways in which different kinds of urban environments are spatially distributed or arranged. These are summarised in Figure 5.29 and Table 5.5.

conurbation a city area containing a large number of people, formed by various towns growing and joining together

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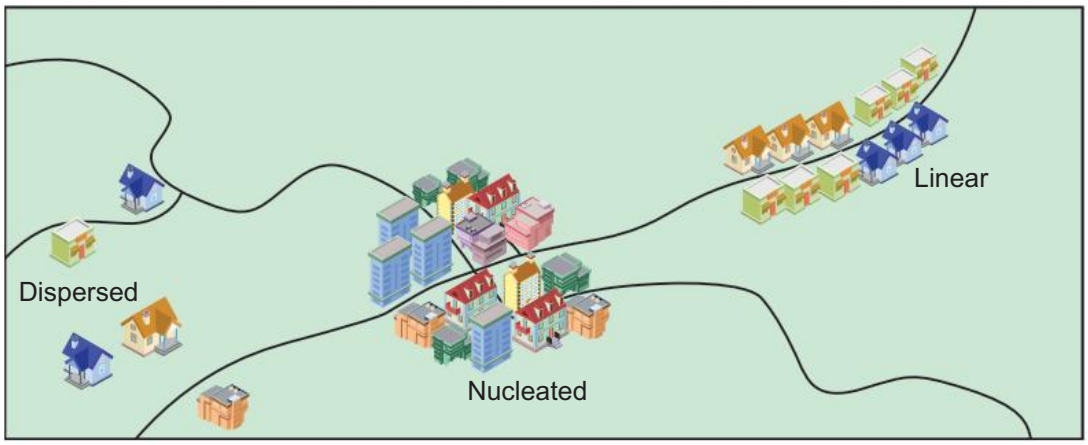
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▲ **Figure 5.28** Different types of urban settlements

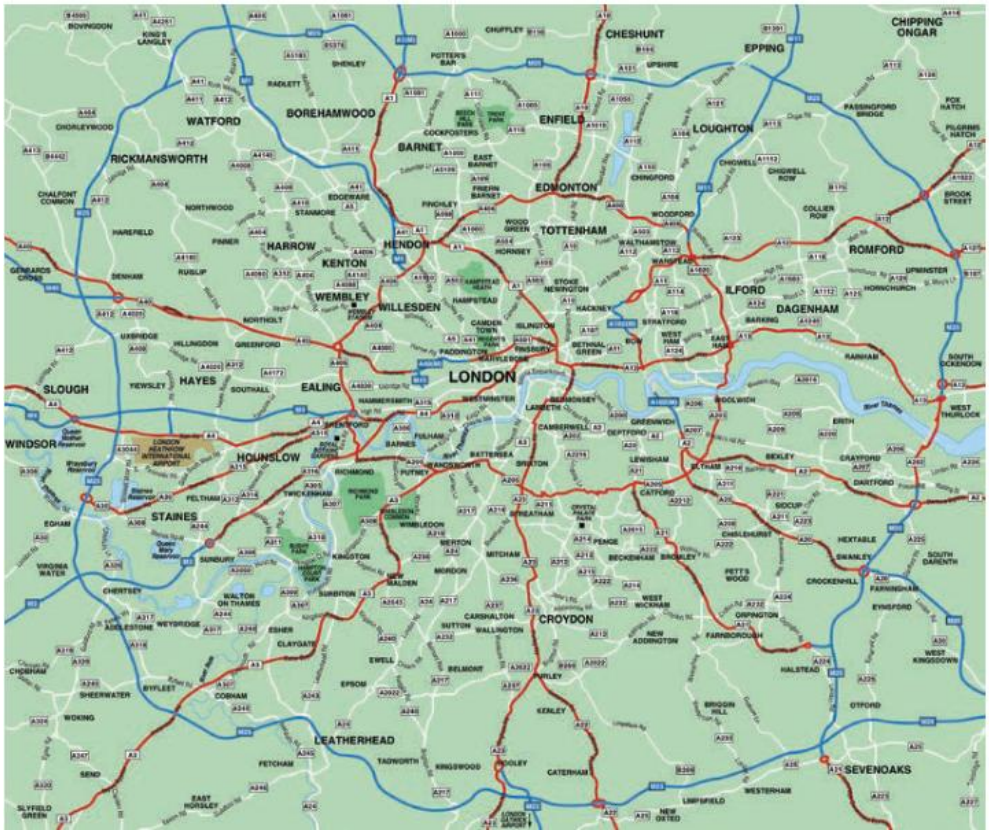
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▲ **Figure 5.29** The layout of different settlement patterns

▼ **Table 5.5** A description of three common settlement patterns

Urban settlement pattern	Description	Example
Dispersed	Urban areas that are evenly spread out across a region	Large cities containing several industrial and commercial centres or towns dotted across a rural landscape
Nucleated	Urban areas that spread out in all directions from a central point	Residential suburbs and industrial zones spreading out from a **central business district**
Linear	Urban areas that are arranged roughly in a straight line	Cities or towns built along features such as a river, coastline, mountain range or major highway



▲ **Figure 5.30** London spreads out from the city centre into the surrounding metropolitan region and into **satellite cities** in surrounding regions. Please note that you can zoom in on this map in the digital versions of this book.

central business district (CBD) the main business and commercial centre of a city

satellite cities smaller cities or towns that are next to major cities

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ACTIVITY 5.11

Describing settlement patterns

Select an urban settlement in Australia or a country of your choice. **Use** Google Earth or Google Maps to get a satellite image of this place and use it to **examine** its urban settlement pattern.

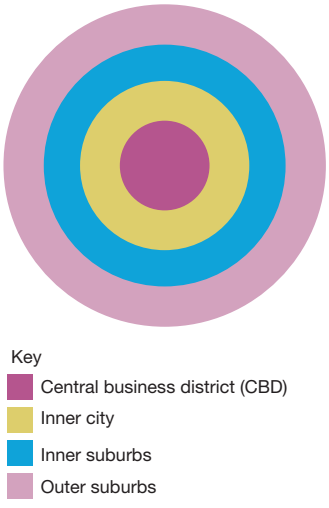
City designs often follow similar distribution patterns. Models are used in geography to outline patterns that apply to several different areas. The Burgess – or Concentric Zone – model (Table 5.6) and Hoyt – or Sector – model (Table 5.7) demonstrate common urban settlement patterns found throughout the world. As with all models, while many cities follow these patterns, there are several that do not. They have been used to explain the way cities, particularly in Europe and the United States, have evolved over time.

The Burgess model reflects the development of cities prior to the widespread use of motor vehicles. Industrial areas such as factories were often closer to the Central Business District, and the working class who were employed in these industrial areas had to live nearby. Because of the pollution and poor conditions, the inner city was less desirable for the wealthier residents. With the increased availability of motor vehicles, changes started to occur in cities, as seen in the Hoyt model. Improved transport meant that industrial areas started to move further away from the Central Business Districts. Those who worked in those industries moved with them.

working class people working in labour or industrial work, often for lower wages

rural–urban fringe the border between rural and urban environments on the outskirts of a city

▼ **Table 5.6** The Burgess model, also known as the Concentric Zone model, was developed by Ernest Burgess in 1925

Burgess model	Zones
	**CBD:** the commercial and business centre of a city, located in the middle of the urban settlement
	Inner city: historically this zone contained dense housing for the **working class** such as terraced housing (Figure 5.31). These areas are now highly sought after and are often the location of high-rise apartment buildings.
	Inner suburbs: less dense housing on larger blocks of land. Due to the way cities spread outwards, suburbs closer to the CBD are generally older than those further out.
	Outer suburbs: this zone is on the outskirts and includes areas on the **rural–urban fringe**. Land is generally cheaper because of the distance from the CBD.

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▼ **Table 5.7** The Hoyt model, also known as the Sector model, was developed by Homer Hoyt in 1939

Hoyt model	Zones
	**CBD:** the commercial and business centre of a city, located in the middle of the urban settlement
	Industry: factories and major transport links such as railway lines and major roads to facilitate various industries
	Residential: different zones of residential with the lower-class workers located near the industrial zone and the upper class located in cleaner, quieter zones in larger blocks



▲ **Figure 5.31** High-density terraced houses, such as in Ealing, housed London's working class.



▲ **Figure 5.32** Satellite imagery can be used to view urban land uses. This satellite image of Hobart shows a range of land uses including industrial, commercial, residential and natural forested mountains.

ACTIVITY 5.12

Comparing models of urban design

1 **Create** a table to list the advantages and disadvantages that you think might arise from cities that are designed using models like the Burgess and Hoyt models.
2 Using Google Earth or Google Maps, search for a city of your choosing (Figure 5.32 shows Hobart). Inspect the land use using satellite images and StreetView starting from the CBD and moving outwards. Based on this information, **decide** whether your chosen city best fits the Burgess or Hoyt model.

How do urban areas grow?

There are two main contrasting ways that urban areas grow: urban sprawl and urban consolidation.

URBAN SPRAWL: GROWING OUTWARDS

Urban sprawl is the unrestricted expansion of a city outwards. It involves an increase in the physical size of the cities, usually into surrounding farmland. Expansion is often rapid and is primarily

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commute time the amount of time taken to travel to and from work

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low-density housing on large blocks. New suburbs often lack essential infrastructure such as train lines, and residents are therefore reliant mainly on cars. Residents often have to travel further to get to work or school, leading to traffic congestion and stresses relating to large **commute times**. Urban sprawl can also lead to a range of environmental impacts such as a loss of biodiversity if forested land is cleared for development.



▲ **Figure 5.33** Urban sprawl, such as in the suburbs surrounding Perth (WA), often leads to the creation of low-density housing estates.

URBAN CONSOLIDATION: GROWING UPWARDS

Urban consolidation is the opposite of urban sprawl. Instead of growing a city outwards, urban consolidation involves containing the growth within the existing city boundaries. It focuses on increasing the density of cities using higher-density houses and apartments. While urban consolidation does not impact the landscape surrounding a city, it can have both positive and negative impacts within a city. Increases in density can cause traffic congestion, yet there is often more access to public transport. Although many people dislike apartment living because of a lack of privacy and outdoor space, many prefer the convenience and lack of maintenance. Concentrating a population into a smaller area can allow more space surrounding a city for food production and nature conservation.



▲ **Figure 5.34** High-density living in Hong Kong allows space for the preservation of forests surrounding the city.



▲ **Figure 5.35** A satellite image of Hong Kong shows the contrasting land use between the dense urban areas and surrounding forest.

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Urban environments in Australia

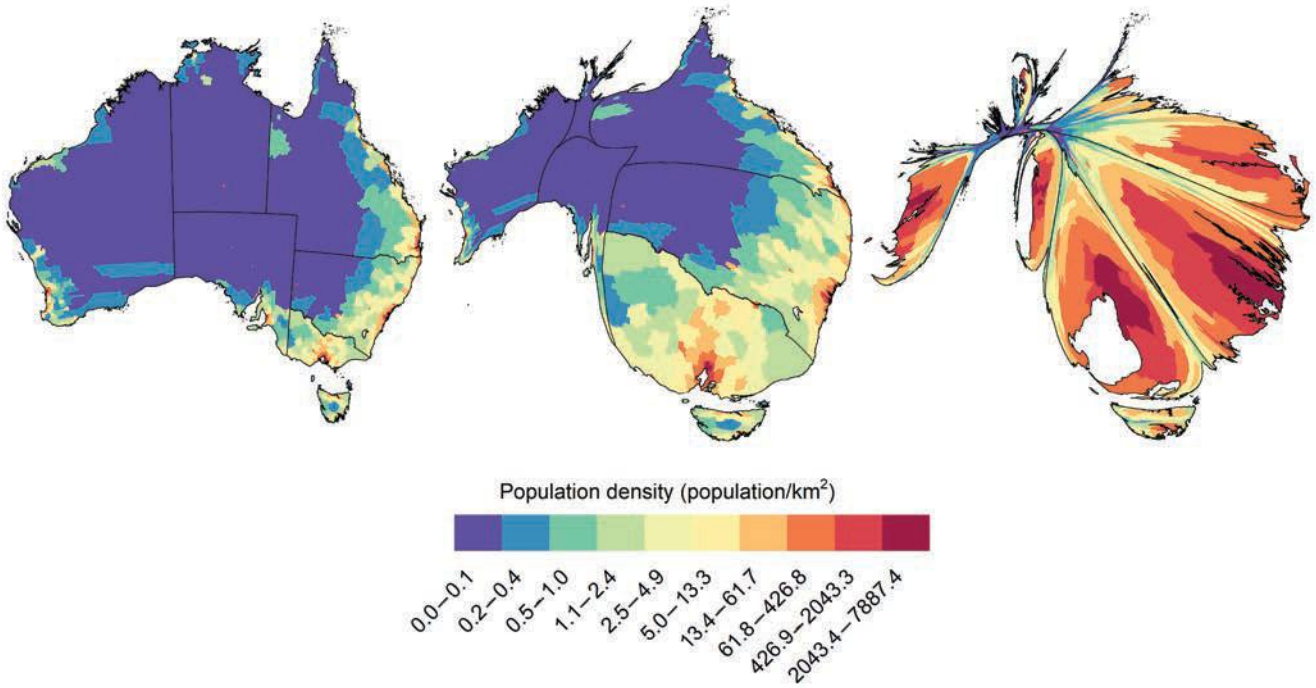
According to the Australian Bureau of Statistics, just over one-third of Australians lived in Australia's eight capital cities in 1901. That figure has now reached approximately two-thirds. Overall, more than 86 per cent of Australia's 25.7 million people lived in urban areas in 2021. This ranks it in the top 30 most urbanised countries in the world. Five Australian cities have a population of more than a million people, while another 14 have populations of over 100 000.

▼ **Table 5.8** The population of Australian cities containing more than 100 000 based on the 2021 Estimated Resident Population

City	Population (2021)
Sydney	4 856 693
Melbourne	4 778 716
Brisbane	2 484 947
Perth	2 150 403
Adelaide	1 383 209
Gold Coast–Tweed Heads	706 673
Newcastle–Maitland	509 894
Canberra–Queanbeyan	482 250
Sunshine Coast	355 631
Central Coast	340 203
Wollongong	305 880
Geelong	289 400
Hobart	230 353
Townsville	181 665
Cairns	155 638
Toowoomba	143 994
Darwin	135 305
Ballarat	111 702
Bendigo	102 899

CARTOGRAMS

A cartogram is a value-area map that visualises a data theme. It allows the data to warp or expand to visually show the geographic size of the data in relation to its distribution.



▲ **Figure 5.36** These maps show 2016 Australian populations. The first is a standard map, and the second two are cartogram maps. These are distorted to show areas with higher population densities as larger areas, according to state (middle) or local government areas (right).

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Interesting fact

Australia's urban areas cover less than 0.5 per cent of the total available land on the continent.

URBAN SPRAWL: THE GREAT AUSTRALIAN DREAM

Urban sprawl has been a major part of Australia's urban development since the 1950s and the increased availability of motor vehicles. During this period, the 'Great Australian Dream' was to own a **detached house** on a quarter-acre block (1000 square metres) with a backyard, clothes line, lemon tree and barbeque. Land surrounding cities was sold for development and urban boundaries expanded. By the 1990s, urban planners began to realise that infinite urban sprawl was not possible and it certainly wasn't sustainable. This led to government policies that focused on re-populating the inner and middle suburban areas with **subdivision** of house blocks, **dual occupancy**, smaller block sizes, redevelopment of industrial land and high-rise apartments.

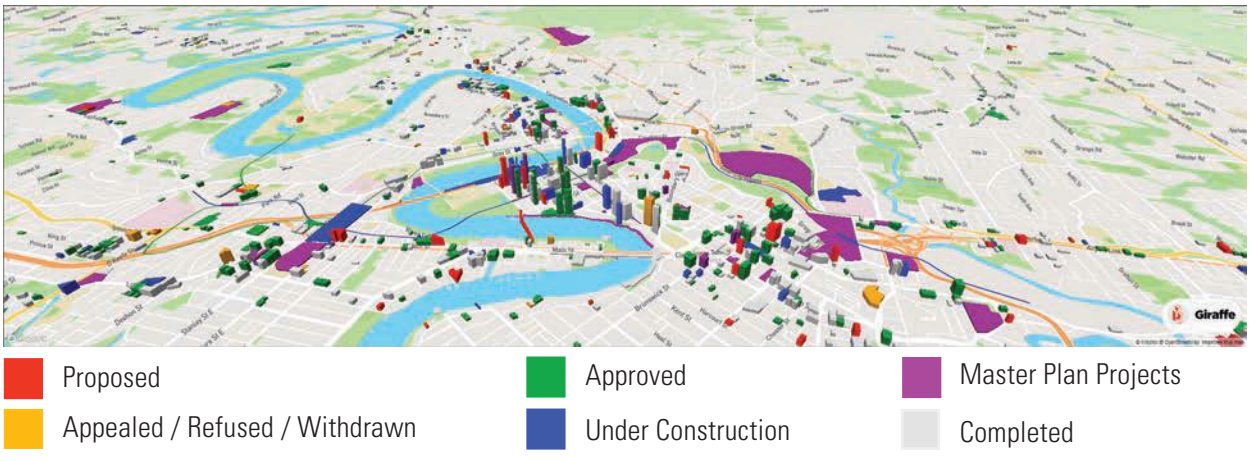
detached house a house that stands alone and is not joined to any other house

subdivision the division of a block of land into smaller pieces for development

dual occupancy a type of development where two dwellings are built on a single block of land

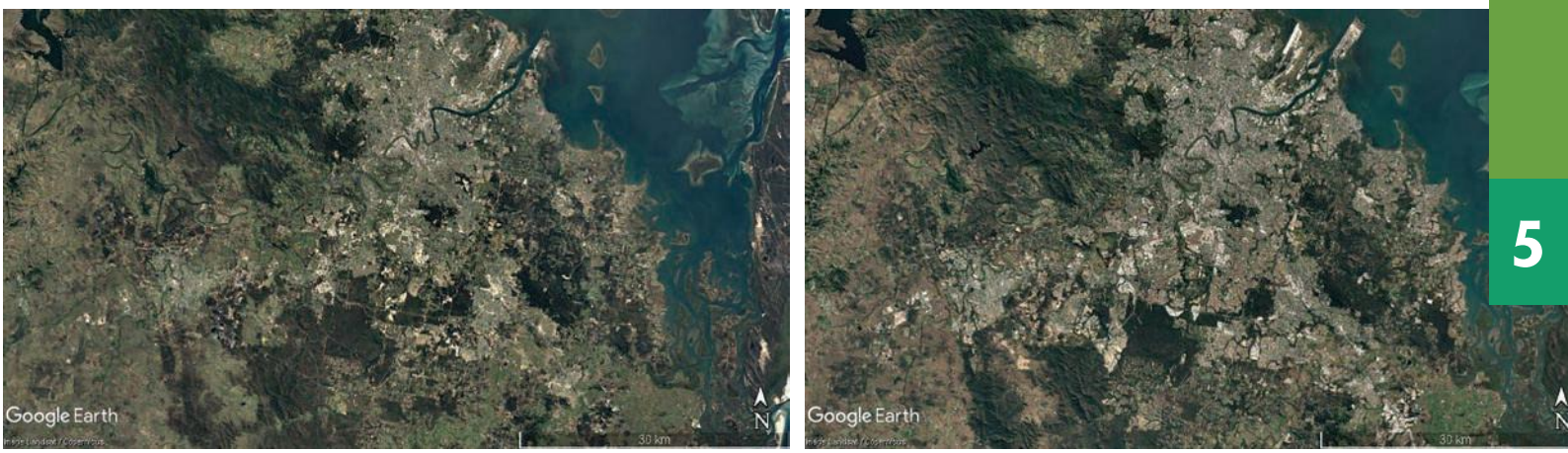
South East Queensland is expected to grow by over two million people by 2050. Most of this growth will occur in the long narrow strip of land between Noosa and the Gold Coast known as the '200 km city'. Accommodating this growth will involve a mix of urban sprawl and urban consolidation within the existing urban boundary. Growth is currently occurring in places such as Ipswich to the southwest of Brisbane and Caboolture to the north in what was previously agricultural land. Many people living on these outskirts of Brisbane are facing a range of impacts including a reliance on cars due to inadequate public transport, traffic congestion and related mental and physical health risks.

One solution to reduce urban sprawl is high-rise development within existing urban areas. This has occurred in places like Woolloongabba in Brisbane's inner south. However, these sorts of developments are often met with criticism due to their locations. For example, high-rise apartment buildings constructed in quiet neighbourhoods lead to an instant increase in local population density and an associated increase in demand for services such as public transport, parks, medical facilities and schools. Fitzgibbon Chase in Brisbane's north is an example of a more sustainable approach, developing a mix of houses, town houses and units with ample green space and access to public transport.



▲ **Figure 5.37** The Brisbane Development Map is an online digital map showing current and future development projects within Brisbane.

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▲ **Figure 5.38** Brisbane has continued to both sprawl outwards and increase in density between 1984 (left) and 2020 (right).

ACTIVITY 5.13

Urban development in South East Queensland

1 Visit the Brisbane Development website to access the interactive development maps for Brisbane and the Gold Coast.
   - **a** **Describe** the distribution of current and future development projects across Brisbane.
   - **b** Click on some of the buildings to see images of the designs for future development projects. **Consider** whether or not the intended developments are appropriate for their location and **propose** some associated positive and negative impacts. In your response, refer to specific locations and projects.

2 Using Figure 5.38 or Google Earth, **describe** how Brisbane has changed between 1984 and 2020. In your description, **consider**:
   - **a** The directions and locations in which Brisbane has grown
   - **b** The extent of Brisbane's growth (using the linear scale)
   - **c** The names of some of the specific suburbs that have grown or new suburbs that have been created.

3 Using Google Earth, visit another location in South East Queensland such as Noosa or the Gold Coast and **compare** their changes over time with Brisbane's.

ACTIVITY 5.14
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Using a geographic information system (GIS)

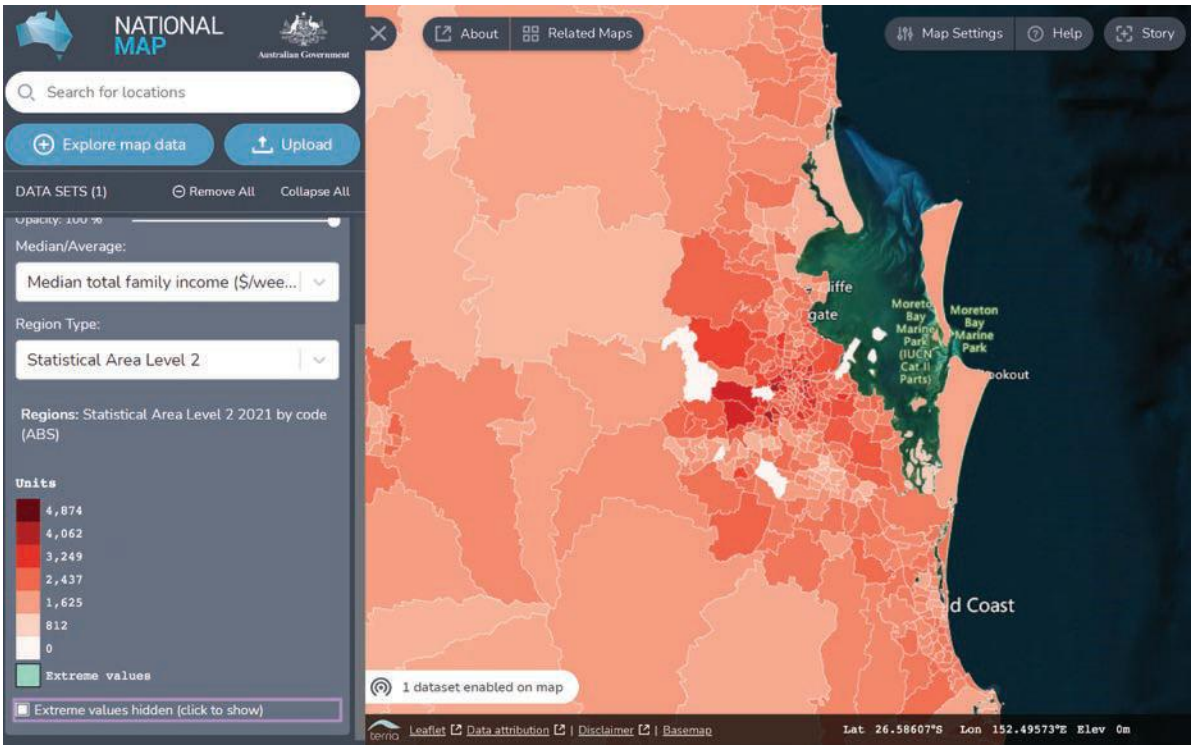
A geographic information system (GIS) is a form of spatial technology used to gather, manage and analyse spatial information such as census data. By organising the data in layers using interactive maps, geographers better understand the causes and impacts of processes such as urban sprawl. For example, Figure 5.40 shows spatial information gathered from a GIS representing the number of people who travel to work using just a car across Brisbane.

Follow these steps to compare the characteristics of Brisbane's inner and outer suburbs:

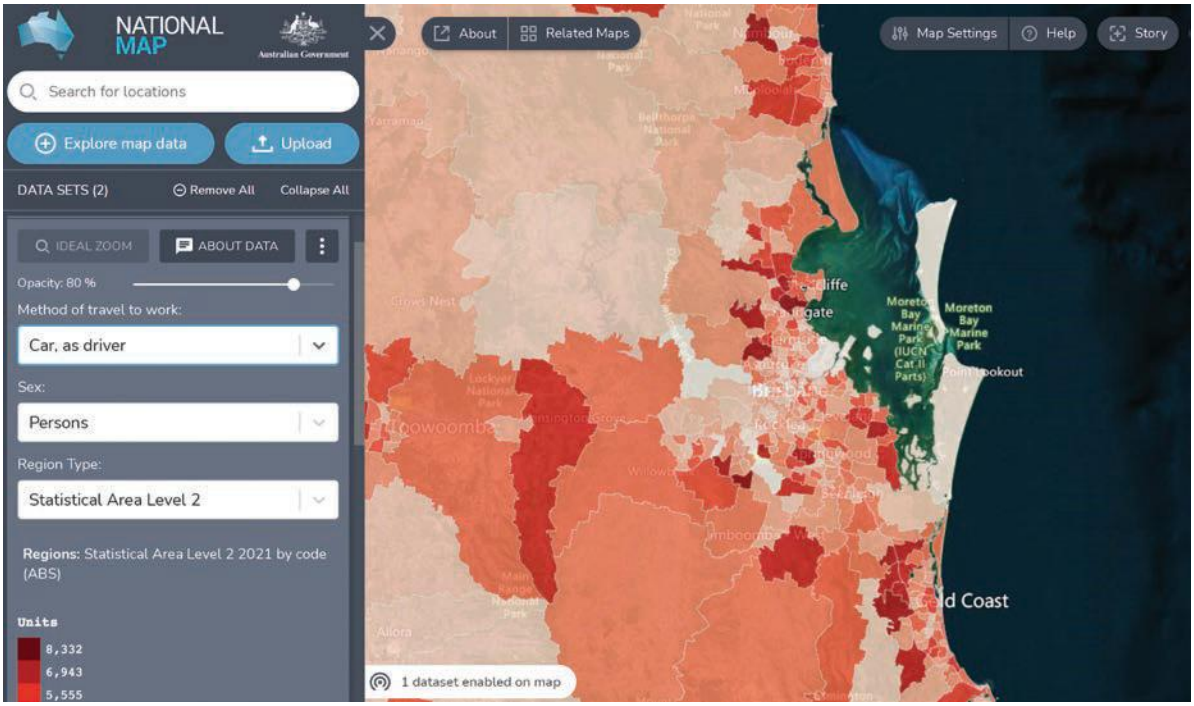
1 Visit the NationalMap website.
2 Click on 'Explore map data', – 'Social and economic', – 'ABS.Stat'.

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3 Next click on 'Census 2021', you can select a specific geographic level that you would like to look at. Statistical areas show localised data and may be more useful for you.
4 When you have selected the data you want, click on 'Add to the map'.
5 Depending on the data set, you might be able to be more specific with your data and select certain categories. For example, under occupation you may be able to select a specific category of occupation such as Professional or Trades to show. Note: you may need to click 'Hide extreme values' as some data can skew the results.



▲ **Figure 5.39** The distribution of average total weekly income per family in the Brisbane area based on 2021 census data. Darker colours indicate higher incomes. © CSIRO Data61 2014–2021



▲ **Figure 5.40** The distribution of people who travel to work by car based on 2021 census data in the Brisbane area. Darker colours indicate more people travelling to work by car. © CSIRO Data61 2014–2021

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ACTIVITY 5.15

Analysing data using a GIS

1 a **Analyse** the data in Figure 5.39 and Figure 5.40 and use this information to **evaluate** the following stereotypes of urban development:

- Housing prices are cheaper in the outer suburbs and are therefore more attractive to lower-income families
- Outer suburbs lack access to public transport and residents are therefore reliant on cars.

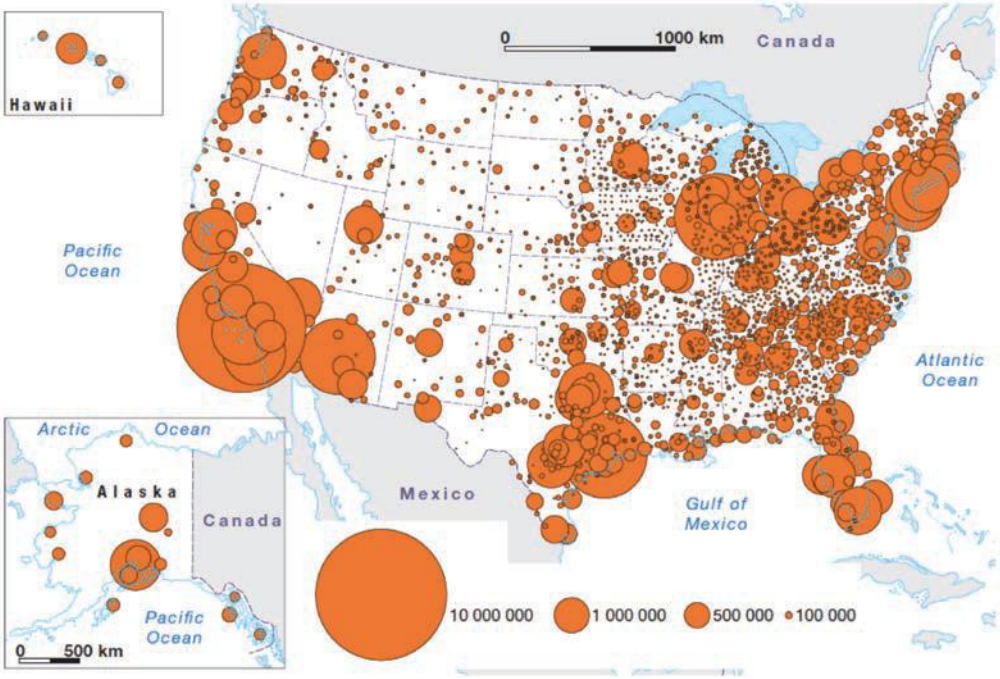
b **Identify** additional information that could be used as evidence to help answer part a.

2 Write your own research questions about the differences in the characteristics of Brisbane's inner and outer suburbs based on the data available. Swap with a classmate and answer each other's questions using the spatial information within the NationalMap GIS.

3 **Evaluate** the usefulness of a GIS such as NationalMap in analysing the impacts of urban development. **Consider** the ease of use and the effectiveness and reliability of the data available.

Urban environments in the United States

In 1920, the number of Americans living in cities surpassed the number living in rural areas for the first time. In 2022, nearly 83.5 per cent of the United States' 332 million people lived in urban areas. This number is increasing as large cities in particular continue to grow. Figure 5.41 shows the distribution of the US population organised by size. In this map, there only appears to be one city of more than 10 million people and several that are not much larger than one million. However, many of these cities are now conurbations that make up one interconnected and continuous urban environment. The populations of some of these conurbations are listed in Table 5.9.



▲ **Figure 5.41** The spatial distribution of the United States' population, 2019

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▼ **Table 5.9** The population of the largest 20 cities in the United States in 2020 and 2010 (based on census data)

City	2010 Census	2020 Census
New York, New York	8 175 133	8 804 190
Los Angeles, California	3 792 621	3 898 747
Chicago, Illinois	2 695 598	2 746 388
Houston, Texas	2 100 263	2 304 580
Phoenix, Arizona	1 445 632	1 608 139
Philadelphia, Pennsylvania	1 526 006	1 603 797
San Antonio, Texas	1 327 407	1 434 625
San Diego, California	1 307 402	1 386 932
Dallas, Texas	1 197 816	1 304 379
San Jose, California	945 942	1 013 240
Austin, Texas	790 390	961 855
Jacksonville, Florida	821 784	949 611
Fort Worth, Texas	741 206	918 915
Columbus, Ohio	787 033	905 748
Indianapolis, Indiana	820 445	887 642
Charlotte, North Carolina	731 424	874 579
San Francisco, California	805 235	873 579
Seattle, Washington	608 660	737 015
Denver, Colorado	600 158	715 522
Washington, DC	601 723	689 545

URBAN SPRAWL IN THE UNITED STATES

Many cities in the United States have also sprawled outwards in a similar way to Australian cities. Table 5.10 lists the 10 most compact and 10 most sprawled cities in the United States. The rapid increase in car ownership and cheap oil prices following World War II was one of the primary factors leading to this growth. The economic cost of the US urban sprawl is significant. This includes costs based on the construction of complex road networks (see Figure 5.42), services such as sewerage and healthcare costs associated with a less healthy population. A difficult value to measure is the amount of lost profit from having so many workers stuck in traffic each day.

Los Angeles is one of the most infamous examples of urban sprawl in the world. Although it has a very large medium-density urban area, unlike New York it does not have a high-density centre. Until recently, Los Angeles did not have an adequate train network. Even today, just over 1 per cent of all daily trips use the train network. Residents rely on cars and they spend an average of 64 minutes in traffic each day.

Interesting fact

It has been estimated that urban sprawl costs the US economy more than US$1 trillion each year!

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▼ **Table 5.10** A list of the 10 most compact and most sprawled cities in the United States in 2020

Most compact cities	Most sprawled cities
New York City	Hickory
San Francisco	Atlanta
Atlantic City	Clarksville
Santa Barbara	Prescott
Champaign	Nashville
Santa Cruz	Baton Rouge
Trenton	San Bernadino
Miami	Greenville
Springfield	Augusta
Santa Ana	Kingsport

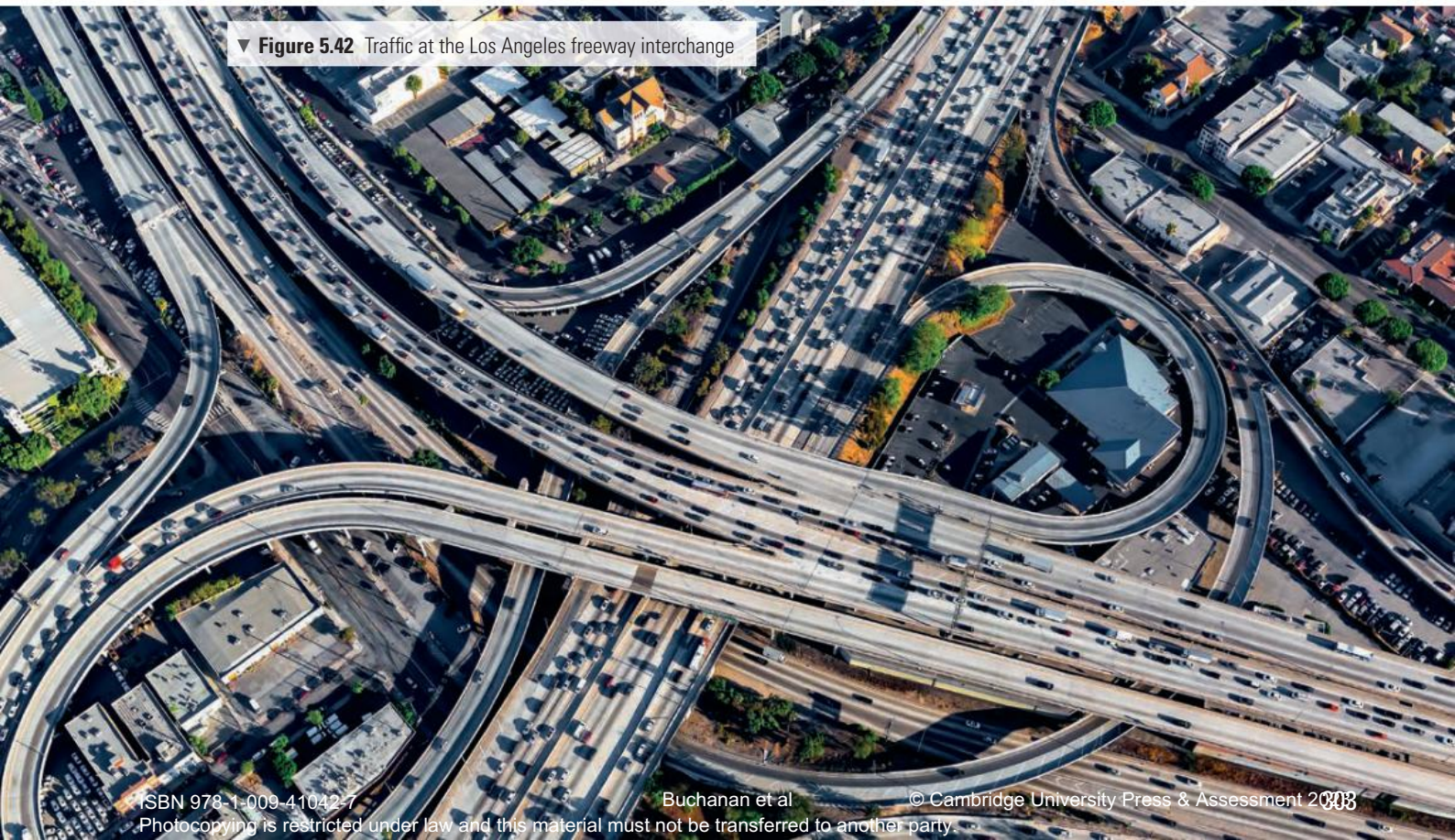
ACTIVITY 5.16

Comparing population densities of US cities

Refer to Table 5.10.

1. Research online to **investigate** the geographic size and population of each of the cities listed and **organise** this data using a table.
2. Divide the population for each city by its geographic size (kilometres squared) to calculate each city's population density.
3. **Compare** the densities of compact and sprawled cities and **explain** whether or not there is a significant difference.
4. **Apply** the same technique to **compare** the density of these American cities with several Australian cities such as Brisbane, Melbourne and Hobart.

▼ **Figure 5.42** Traffic at the Los Angeles freeway interchange



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▲ **Figure 5.43** Central Park, Manhattan

NEW YORK CITY: THE CITY THAT NEVER SLEEPS

With more than 8.8 million people in 2020, New York City is the largest city by population in the United States. When including the surrounding metropolitan area, its population just over 20 million, which classifies it as a megacity. While New York is not the biggest city in the world, it does use the most energy in terms of electricity and fuel, even compared to the greater Tokyo metropolitan area, which has an extra 18 million people. However, New York is making efforts to improve its environmental sustainability by protecting the health of urban waterways, encouraging cycling as a form of sustainable transport, growing food locally in urban gardens including on rooftops and by building energy-efficient buildings. One of New York's unique features is Central Park, located in the middle of Manhattan (see Figure 5.43). It contains more than 18 000 trees and provides an important urban habitat for local wildlife, improves air and water quality, and encourages active lifestyles.

ACTIVITY 5.17

Using Google Earth Pro to explore and compare cities

1 Find the location of Central Park using Google Earth Pro.
2 Measure the size of Central Park using the ruler tool and **compare** it with the size of a park near your school.
3 **Investigate** the design of Adelaide and its urban parkland. **Consider** the similarities and differences between the layout of parkland in Adelaide and Manhattan.

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DEVELOPING YOUR UNDERSTANDING 5.2

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** the following terms:
   - **a** Urban concentration
   - **b** Megacity
   - **d** Urban settlement
   - **e** Conurbation.

2 **Explain** dispersed, nucleated and linear settlement patterns as shown in Figure 5.29 and provide an example of each.

3 **Identify** and **explain** the differences between the Burgess and Hoyt models of urban settlement.

4 **Explain** the advantages and disadvantages of urban sprawl and urban consolidation.

Interpret

5 With reference to an example, **explain** why a city might have a large urban population but a low urban concentration.

6 **Identify** and rank three challenges facing megacities in order of the most severe to the least severe. **Justify** your decision.

7 **Compare** the spatial distribution of Australia's population and the United States' population by referring to Figures 5.36 and 5.41.

Argue

8 Using Tables 5.8 and 5.9, calculate the percentage of Australians and Americans who are living in large urban areas. To do this, divide the population of each city by the total population of the entire country. Use this calculation to **determine** which country has a higher urban concentration.

9 'Urban sprawl is an essential part of urban growth and should be encouraged.' **Evaluate** this statement and **apply** examples from this chapter to **justify** your evaluation.



▲ **Figure 5.44** The skyline of Barcelona, Spain. How do you think urban sprawl is affecting this area?

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5

5.3 Internal and international migration in Australia and China

FOCUS QUESTIONS

- What is internal migration?
- What impacts does internal migration have in Australia and China?
- What is international migration?
- Why are migrants entering Australia and what effect is this having?

The Australian Bureau of Statistics defines internal migration as the movement of people from one defined area to another within a country. This includes:

- Rural to urban migration
- Urban to rural migration
- Intra-urban migration where people move to a different part of an urban area
- Inter-urban migration where people move to a different urban area
- Interstate migration where people move to a different state.

Unlike international migration, internal migration does not change the population of a country. Instead, it changes its spatial distribution or arrangement of where people live. Therefore, for every place within a country that is growing due to internal migration, another place within that country is shrinking. The reasons for and impacts of internal migration are explored in this section in the context of Australia and China.

Internal migration within Australia

WHY ARE AUSTRALIANS MOVING?

According to data from the 2021 Australian census, 15 per cent of Australians changed their address in the year before the census. The reasons why Australians choose to move include:

- Expensive house prices in capital cities forcing people to move to the outer suburbs, nearby cities or rural areas
- Lucrative job opportunities in industries such as mining
- Access to educational opportunities such as high-quality universities
- Lifestyle choices such as preferences for where to raise children or retire.

A common example of movement is young people who have grown up in a rural area who choose to move to a capital city to attend university. The Australian Government encourages this movement by offering **financial incentives** such as **youth allowance**, **rent assistance** and various **relocation scholarships**. Similarly, educated professionals such as doctors and teachers are enticed to work in rural and remote areas through salary bonuses and housing subsidies (discounts).

financial incentive money that is offered to people to encourage them to do something such as migrate

youth allowance fortnightly payments available through Centrelink for full-time students aged between 16 and 24

rent assistance payments to contribute towards rent expenses for those living away from home

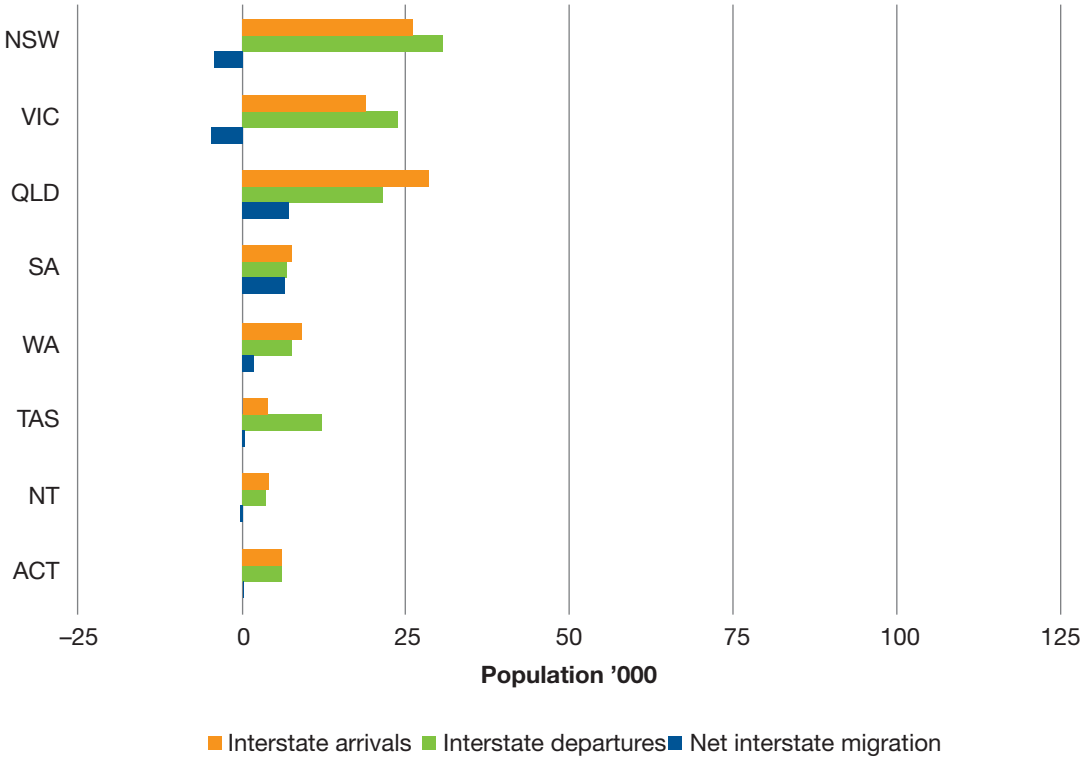
relocation scholarship payments for each year of study for students from regional and remote areas who undertake full-time study

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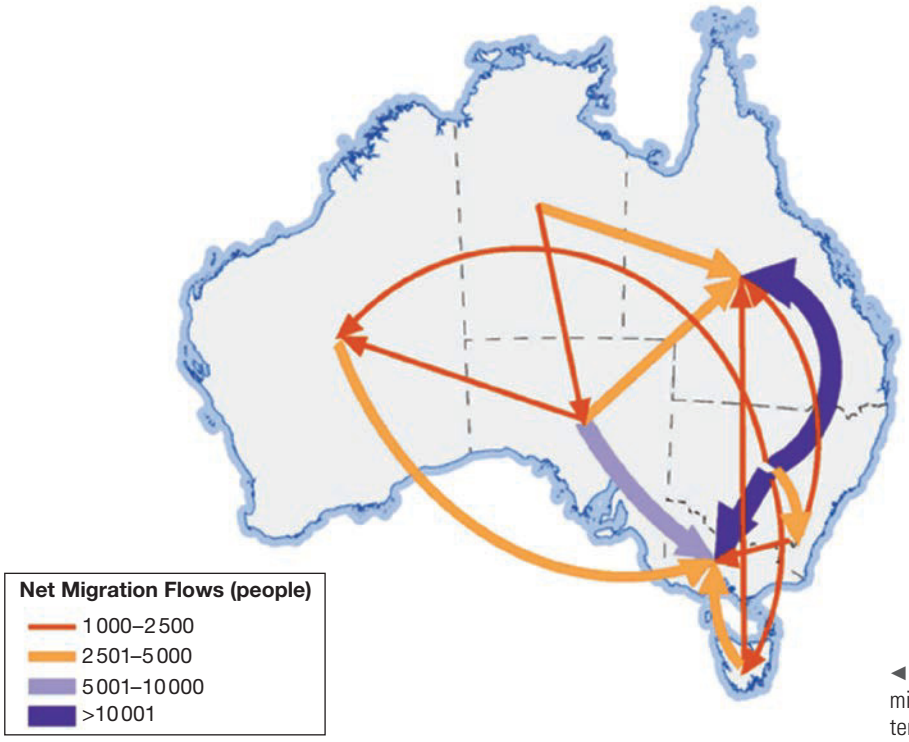
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WHERE ARE AUSTRALIANS MOVING TO?

Over the year to March 2022, Queensland and Western Australia were the states with the highest positive net interstate migration (see Figure 5.45). This means there were more people who migrated to these states compared with those who left. Figure 5.46 is a map which



◄ **Figure 5.45** The annual number of interstate arrivals and departures, and the net interstate migration for each state and territory



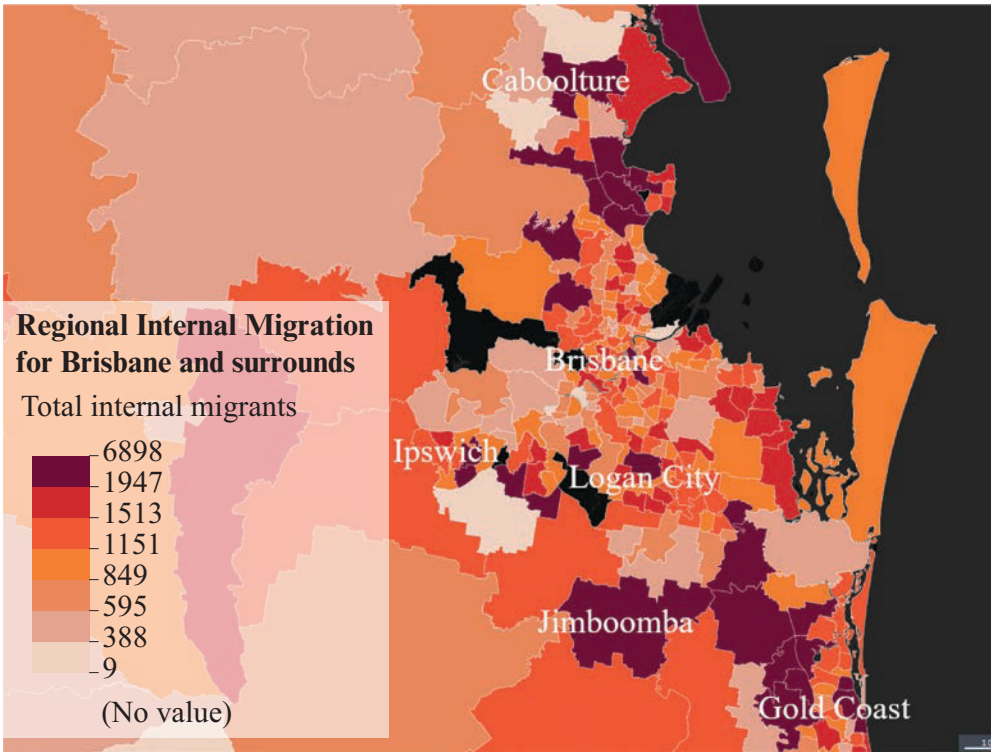
◄ **Figure 5.46** The level of net migration between states and territories in 2016

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details major trends in migration from 2016. It shows the origin and destination of internal migrants within Australia at this time. Within each state, the location of where migrants are choosing to live also varies spatially. Figure 5.47 shows the distribution of internal migrants within and around Brisbane.



▲ **Figure 5.47** The distribution of internal migrants within Brisbane and surrounding areas

ACTIVITY 5.18

Analysing internal migration

1 **Create** a table to record and estimate the levels of net migration for each state and territory using the data in Figure 5.45.
2 Using Figure 5.46, **identify** the major movements of people between states and territories in 2016.
3 Using your answers to Questions 1 and 2, write a paragraph summarising patterns of internal migration in Australia.
4 Refer to Figure 5.47.
   a **Describe** the spatial distribution of where internal migrants are living across and surrounding Brisbane.
   b **Identify** and **explain** why migrants might be moving to these particular locations.
   c **Consider** the social, economic and environmental consequences of this distribution in Brisbane.

POPULATION BOOM TO BUST

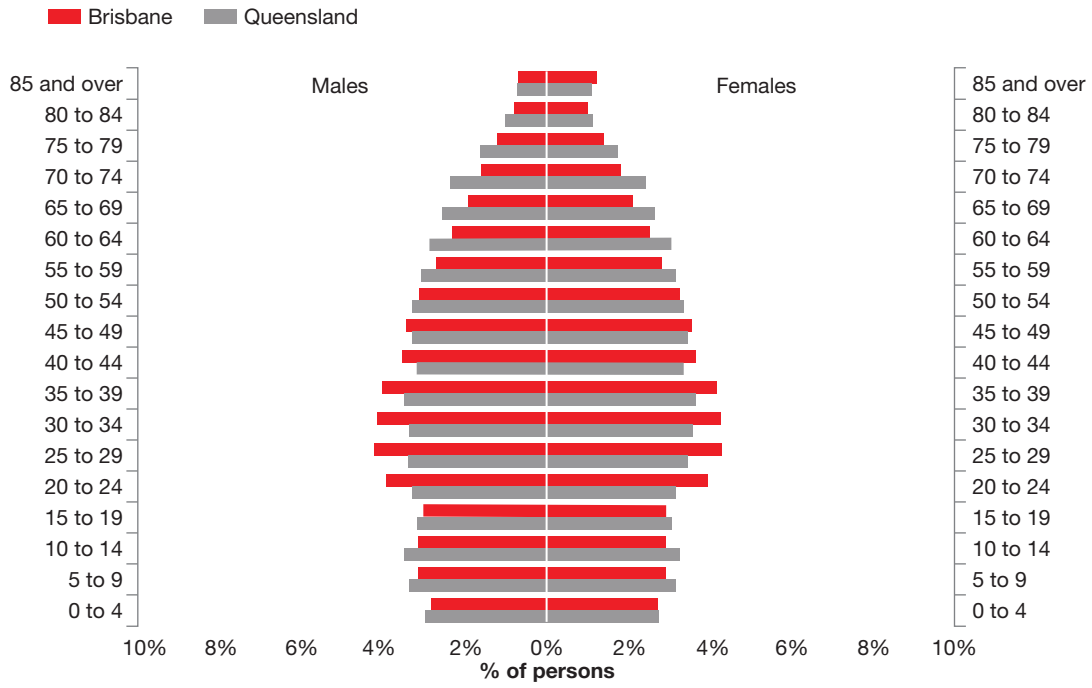
We have looked at impacts of rural to urban migration in terms of urbanisation and the increasing density of urban areas. This form of internal migration also affects the population structures of rural areas where these people came from. Many rural towns experience a mass movement of young adults each year as they finish school and move

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to cities to attend universities to find a wider range of jobs. Oakey is a town located approximately 150 kilometres west of Brisbane, past Toowoomba. The town has a total population of approximately 4300 people. Figure 5.48 shows population pyramid of the area compared to Queensland. A population pyramid is a graph that shows the population of an area broken down by five-year age groups and sex. The population pyramid in Figure 5.48 shows that there is a lower percentage of people aged between 20 and 39 in Oakey compared to the state as a whole. This is very different to the age structure of Brisbane City shown in Figure 5.49.



▲ **Figure 5.48** The population pyramid of Oakey, compared to Queensland in 2021



▲ **Figure 5.49** The population pyramid of Brisbane and Queensland in 2021

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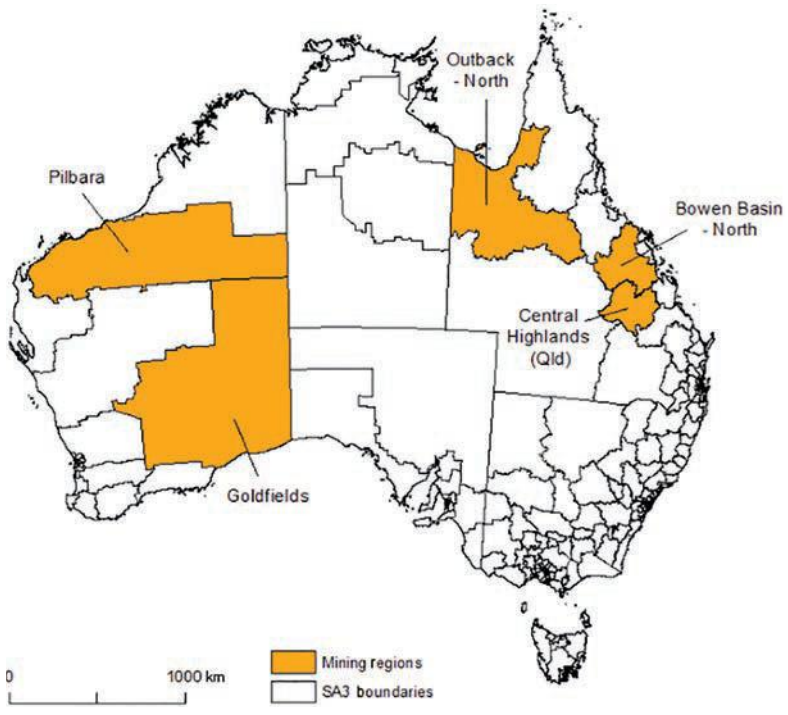
ACTIVITY 5.19

Comparing population pyramids

1 **Compare** the percentages of people in the young, middle and older age groups and **discuss** what this implies about internal migration within Queensland.
2 **Propose** a list of reasons that might **explain** the similarities and differences between the population pyramids of Oakey and Brisbane.
3 Find population pyramids for two other areas in Queensland. **Use** this information to **determine** whether or not internal migration and urbanisation in Queensland are causing a similar imbalance in population structures.

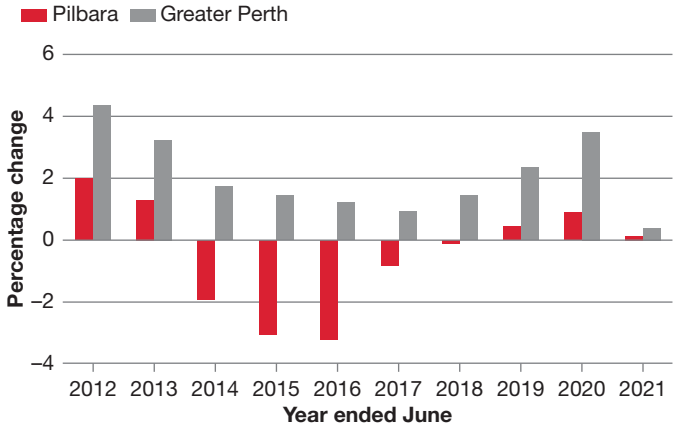
Changes to rural industries can have a significant impact on internal migration. For example, strong economic growth in the mining industry has attracted tens of thousands of people to remote mining regions. One of the most well known is the Pilbara region in northern Western Australia covering an area of 500 000 square kilometres. While the Pilbara's population has increased by 40 per cent since 2005, Figure 5.51 shows that the population started to decrease in 2015 for the first time since the mining boom began. This was largely driven by a drop in the price of iron ore.

The reduction or losses of these industries can have a flow-on effect on small towns. Kambalda is located 60 kilometres south of Kalgoorlie in Western Australia. It boomed during the 1960s when nickel mining began. A reduction in the price for nickel has led to the recent closure of the four biggest mines. Since the closures, Kambalda's 2500 residents are struggling with the closure of their bank and the prospect of losing their doctor's surgery. This is further contributing to their declining population. In contrast, mining activity within Queensland's Bowen Basin has led to major growth in property value and rental yields in townships such as Emerald and Rockhampton. Population projections for Rockhampton show that it is expected that Rockhampton's population will grow 20 per cent from 83 065 in 2021 to 99 664 in 2041. Growth in the city could see it return onto the list of the 20 biggest cities in Australia by 2050.

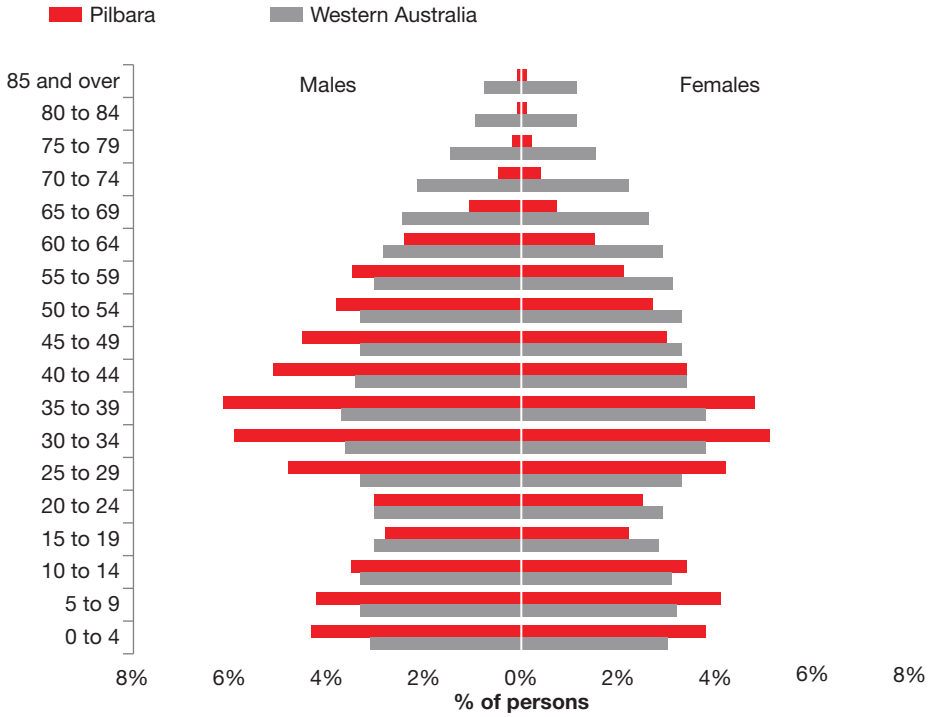


▲ **Figure 5.50** This map shows the locations of five of Australia's mining regions in which more than 10 per cent of the population are employed in the mining industry. This includes the Pilbara region of Western Australia and the Bowen Basin in Queensland.

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▲ **Figure 5.51** Annual population growth in the residential population in the Pilbara region



▲ **Figure 5.52** The population pyramid of the Pilbara region based on census data, 2021

Internal migration within China

HOW IS THE DISTRIBUTION OF CHINA'S POPULATION CHANGING?

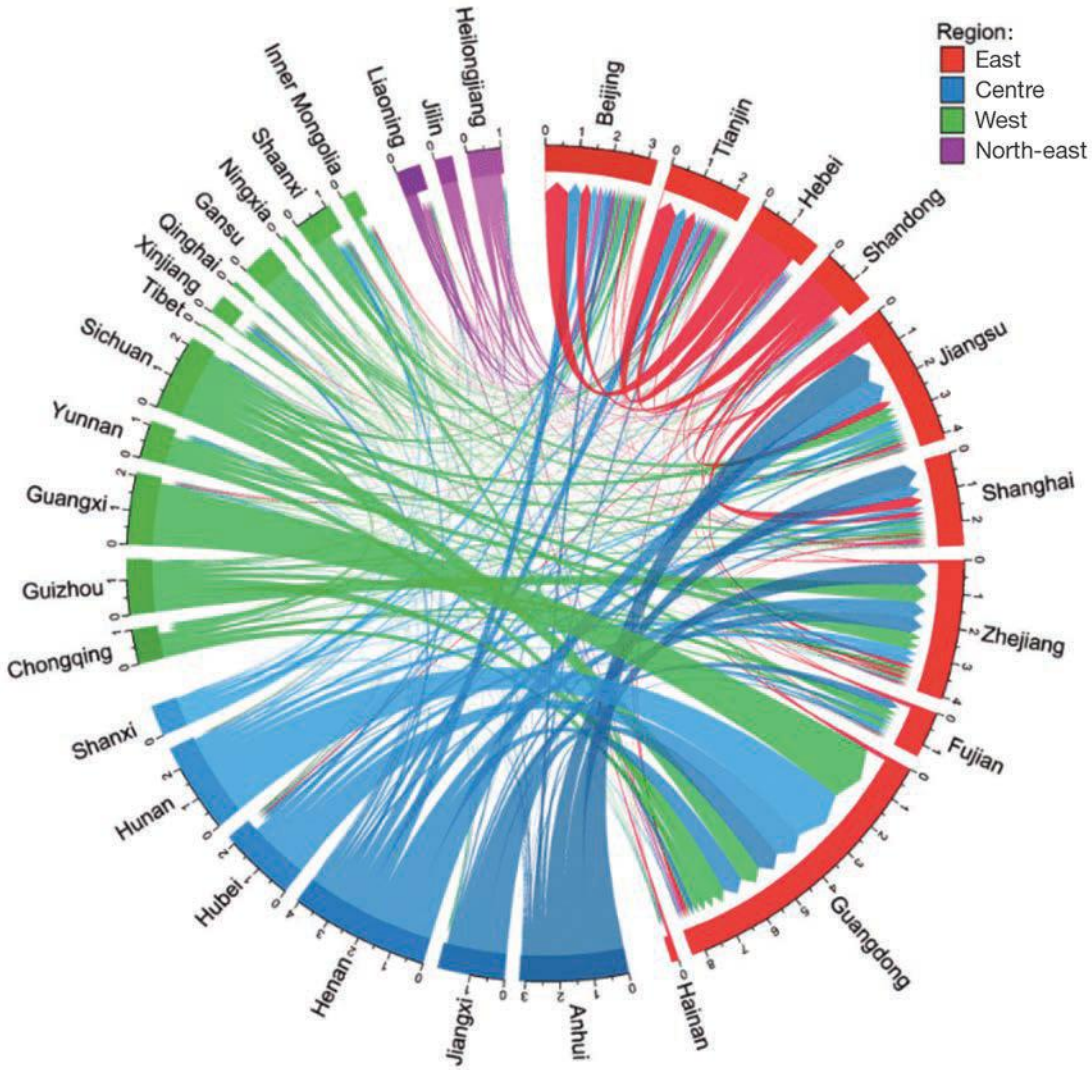
Data from China's last national census in 2010 showed that more people were living in urban than rural areas for the first time. This is a significant increase from 1990 when China was only 26 per cent urbanised. The main cause of this urbanisation has been the rural to urban migration of workers driven by China's economic growth and industrialisation. This has been occurring at an unprecedented rate since 1978, when laws preventing internal migration were abolished. The main destination for internal migrants is Guangdong province, which contains the Shenzhen and Zhuhai economic zones.

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There are currently more than 270 million rural migrants working in China's cities, which is roughly 20 per cent of China's total population. Thirty-nine per cent of these work in the manufacturing industry. These migrants are mostly temporary migrants, meaning they will eventually return to their home towns. Around half of them have migrated without their families.



▲ **Figure 5.53** The origin and destination of migrants within China by province, between 2010 and 2015, in millions.

ACTIVITY 5.20

Internal migration in China

1 **Identify** the major places where people are moving from and to.
2 **Describe** the distribution of provinces with a net positive and net negative level of migration.
3 **Explain** a factor that might be responsible for this migration pattern.

Interesting fact

The number of people living in urban areas in China grew from 108 million in 1960 to 883 million in 2021.

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CHINA'S FLOATING POPULATION

Every citizen in China is registered in the place where they were born. This household registration is known as ***hukou***. This policy was intended to limit the amount of internal migration to ensure its sustainability. *Hukou* allows residents to access government assistance including education, welfare and health care within their registered area. China's temporary internal migrants are not registered in the places where they work and are therefore referred to as the floating population. These people are not able to access government services in the places where they are working. They are forced to either pay a large sum of money to access these services or attempt to transfer their *hukou*, which is a long and difficult process. Children of migrants are only eligible for the same *hukou* as their parents. This means that if a child is born to unregistered migrant workers in Beijing, they will not be registered to Beijing but instead to the place where their parents came from.

hukou an official document registering that a Chinese citizen is a legal resident of a particular area

WHAT ARE THE IMPACTS OF CHINA'S INTERNAL MIGRATION?

The rise of migrant workers in China has led to a range of negative impacts:

- Many migrant workers are often forced to work in dangerous working conditions with no job security.
- Migrant workers are often forced to undertake very low-paid jobs and work extremely long hours.
- The children of migrants who do not have a valid *hukou* are forced to return to their home town, often to live with their grandparents.
- Many migrant workers spend many years away from their families.

On the other hand, internal migration has been a major factor in China's economic growth and industrial development. Money sent back to families in rural areas has improved the living conditions within these places, while a reduction in the rural population has reduced the rural unemployment rate. China has also begun to relax the *hukou* system. The 2019 Urbanization Plan requires that small cities with populations between one and three million people will lift the restrictions on migrants without registration. This plan will also help workers in larger cities to transfer their *hukou* to their place of work. These reforms aim to both reduce the negative impacts of the system and boost urbanisation in these smaller urban areas.



▲ **Figure 5.54** The *hukou* is China's government household registration system, which identifies a person's area of residence, name, parents, spouse and date of birth.

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What is international migration?

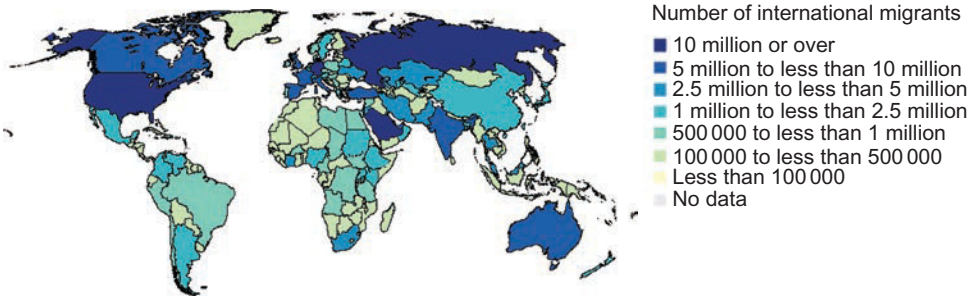
According to the United Nations, an international migrant is 'any person who lives temporarily or permanently in a country where he or she was not born, and has acquired some significant social ties to this country'. A migrant worker is an example of a temporary migrant. They might be working internationally for a fixed amount of time to fill a position that is in high demand, to earn money to send back home to their family or simply to enjoy a unique experience. Permanent migrants, on the other hand, move to a new country to live without any intention of moving back home again. This involves either gaining **citizenship** or being granted **permanent residency**.

citizenship the status of officially being a member of a country and having legal rights such as voting in elections

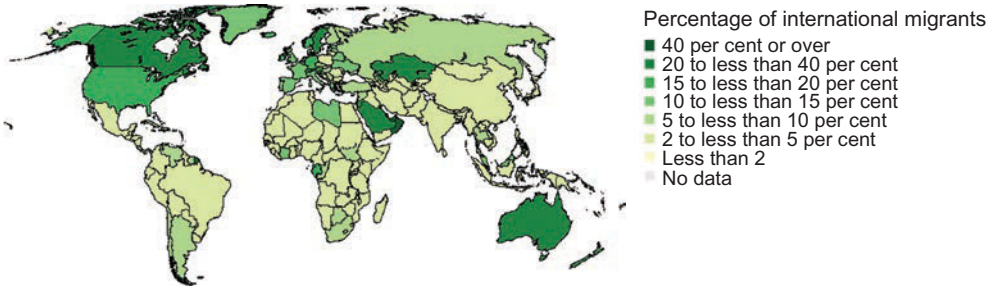
permanent residency having the right to live in a country for as long as you like without being a citizen

WHAT ARE THE ORIGINS AND DESTINATIONS OF INTERNATIONAL MIGRANTS?

During 2019, there were an estimated 272 million international migrants living outside of their country of birth. This was 3.5 per cent of the global population. The number has risen from 173 million in 2000 (see Figure 5.57) and is projected to reach over 400 million by 2050. Figure 5.55 shows the number of international migrants living within each country. The global distribution is very uneven. Europe hosts the most with 82 million, while North America has 59 million. However, when considering the proportion of migrants compared to the entire population, Oceania ranks highest with 21.2 per cent and North America is second with 16 per cent. Figure 5.56 shows the distribution of countries based on what percentage of their population are migrants. Australia ranks among the highest at 29.7 per cent.

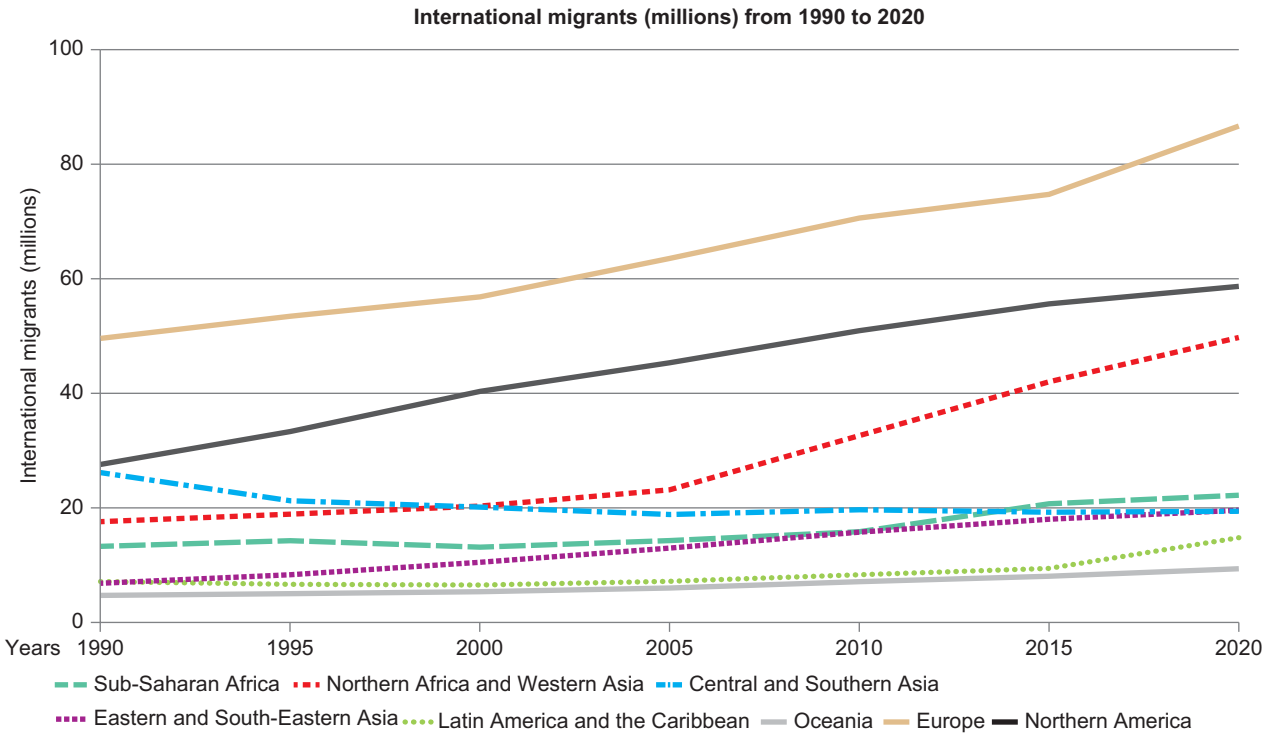


▲ **Figure 5.55** The global distribution of international migrants in 2019



▲ **Figure 5.56** The percentage of countries' populations that are made up of international migrants in 2019

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▲ **Figure 5.57** The number of international migrants in eight world regions between 1990 and 2020

Interesting fact

In March 2020, Australia closed its borders to all non-citizens and non-residents. In 2020 (financial year), there were 7.94 per cent fewer overseas migrant arrivals in Australia than in 2019, and 2 per cent more overseas migrant departures than in 2019. The figures for the 2021 financial year show a 73.5 per cent decline in the number of overseas migrant arrivals in Australia when compared to the pre-COVID levels of 2019. In the 2022 financial year, overseas migrant arrivals climbed by 170.5 per cent compared to the previous year.

THINKING DEEPER

As a class, discuss how these changes in migration numbers might have affected Australia.

ACTIVITY 5.21

Analysing migration data

1 Refer to Figure 5.55 and Figure 5.56.
   - a **Identify** five countries that host a large number of international migrants.
   - b **Identify** five countries in which migrants make up a large proportion of their population.
   - c **Describe** the spatial association between the number of migrants in a country and the proportion of their population that are migrants.
   - d **Propose** a reason for your answer to part c.

2 a **Analyse** Figure 5.57 and **describe** how the total number of migrants has changed over time.
   - b **Identify** the region that has gained the most migrants since 1990.

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5

net overseas migration the difference between the numbers of immigrants and emigrants in a country

immigrant a migrant who comes to live in a different country

emigrant a migrant who leaves a country to live in a different country

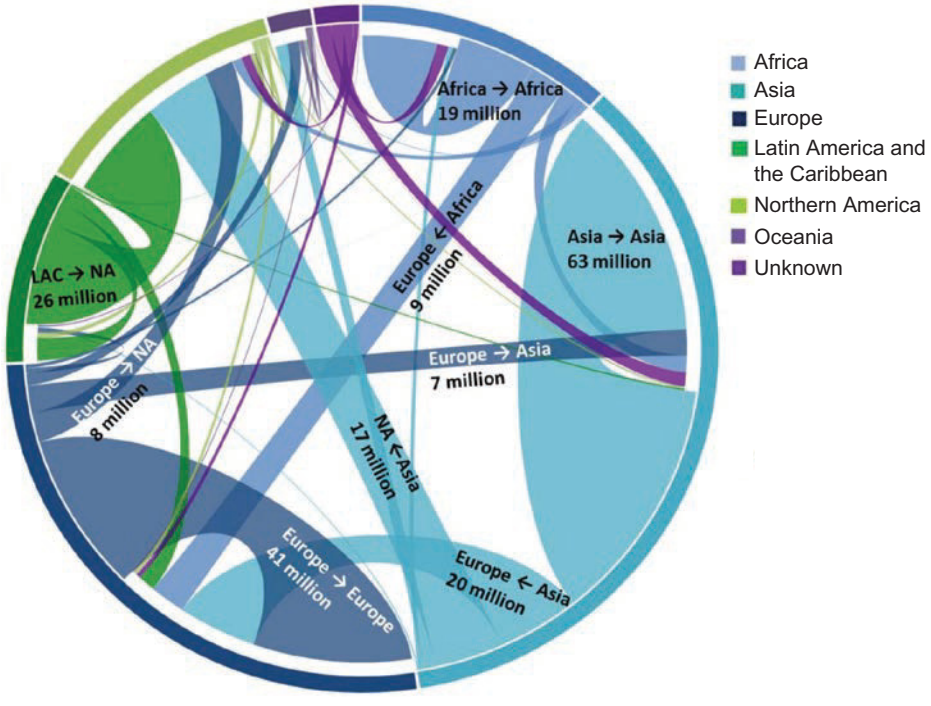
host country a country that is home to an international immigrant

donor country a country from which an international emigrant came

Net overseas migration is the difference between the number of people entering a country, known as **immigrants**, and the number of people leaving a country, known as **emigrants**. A country that has more immigrants than emigrants has a positive net migration. Table 5.11 shows the 10 **host countries** with the highest number of immigrants and the 10 **donor countries** with the highest number of emigrants. Russia is the only country to feature on both lists. Although it hosts 12 million immigrants, 10 million Russians are also living abroad, meaning it has only a relatively small positive net migration.

▼ **Table 5.11** The 10 countries that hosted the most immigrants and the 10 countries from which the most emigrants left in 2020

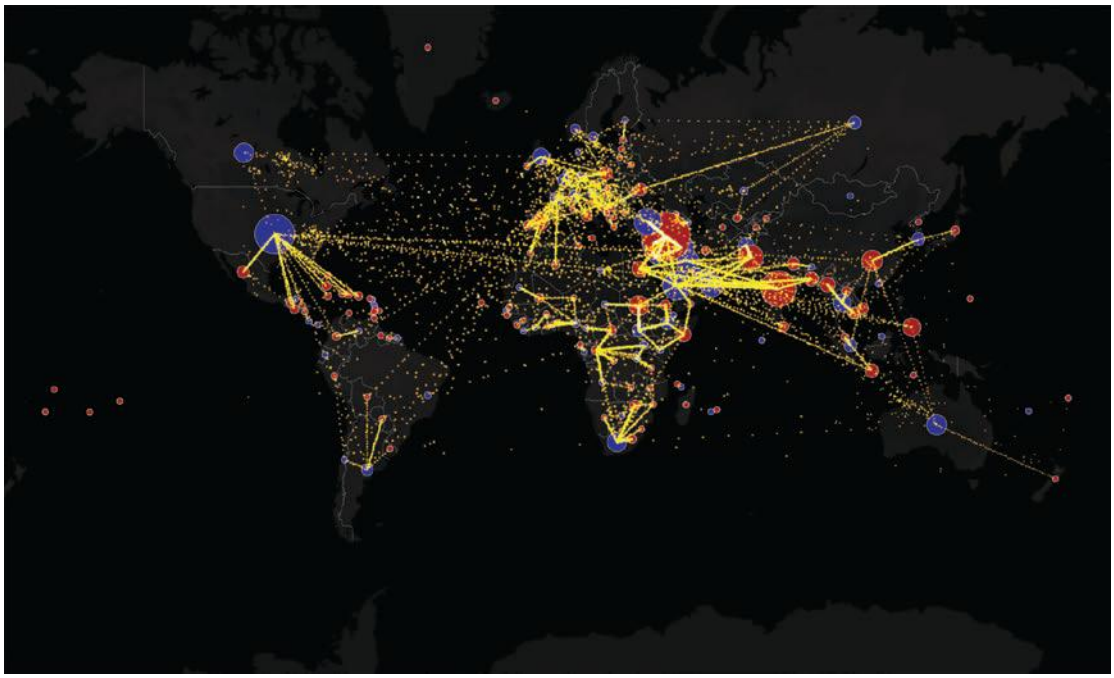
Host country	Number of international immigrants (millions)	Donor country	Number of international emigrants (millions)
United States of America	50.6	India	17.9
Germany	15.8	Mexico	11.1
Saudi Arabia	13.5	Russia	10.8
Russia	11.6	China	10.5
United Kingdom	9.4	Syria	8.5
United Arab Emirates	8.7	Bangladesh	7.4
France	8.5	Pakistan	6.3
Canada	8.0	Ukraine	6.1
Australia	7.7	Philippines	6.1
Spain	6.8	Afghanistan	5.9



▲ **Figure 5.58** The origin and destination of international migrants by region in 2019

Most international emigrants move to countries within the same region. Figure 5.58 demonstrates this concept. For example, while 41 million European migrants have moved to another European country, only 7 million have moved to Asia and 8 million have moved to North America.

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▲ **Figure 5.59** An online interactive map showing the movement of migrants (yellow) and the amount of net migration (blue for positive, red for negative) between 2010 and 2015

ACTIVITY 5.22

Analysing the movement of international migrants

Visit Metrocosm's online global immigration map.

1 **Identify** three common movements of migrants, three countries with the largest positive net migration and the largest negative net migration.
2 Click on a blue country and **identify** the countries from which it is receiving most of its immigrants.
3 Click on a red country and **identify** the countries to which most of its emigrants are moving.

WHY DOES INTERNATIONAL MIGRATION OCCUR?

We have previously looked at the concept of rural to urban migration as a cause of urbanisation, and listed some push and pull factors that might make people either want to leave a place or entice them to move to a place. Similar factors can be used to understand the reasons why people choose to move to a different country either temporarily or permanently. Some of these are listed in Table 5.12. Economic factors such as job availability, higher wages and a lower cost of living are common reasons for migrating. In fact, three-quarters of all international migrants are of working age, meaning they are aged between 20 and 64. Many people also move countries to live in a more favourable climate. For example, Ecuador on the west coast of South America is a popular retirement destination for North Americans due to its stunning beaches, cheap housing and average temperature of just under 20°C.

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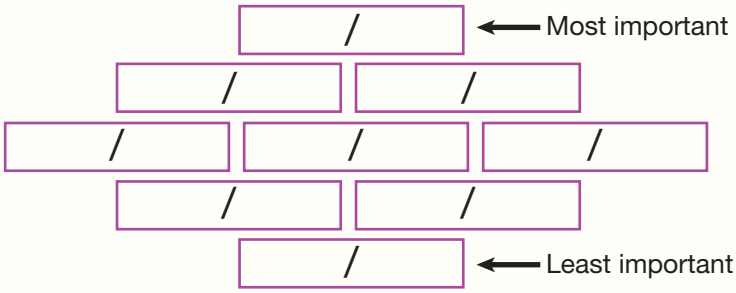
▼ **Table 5.12** Push and pull factors that lead to international migration

Push factors	Pull factors
• Poverty • Unemploy • High cost of living • Food insecurity • Natural disasters such as flood • War • Political, racial or religious persecution • An uncomfortable climate • A lack of services	• Better employment opportunities • A higher quality of life • A more affordable lifestyle • Food security • Safety • Political stability • Better quality services such as education • A more favourable climate • Close to family and friends

ACTIVITY 5.23

Using a diamond ranking template

Create a diamond ranking template to rank the nine push factors and nine pull factors from Table 5.12. **Decide** which of the factors would be the most and least significant in determining international migration and **justify** your decision.





▼ **Figure 5.60** Ecuador's varied natural environment and warm climate make it a popular destination for those wanting to retire abroad.

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▲ **Figure 5.61** Syrian refugees arriving on the shore of Lesvos, Greece, in November 2015

While many people migrate out of choice in an attempt to improve their lives, others are forced to leave. An **asylum seeker** is someone who flees their own country to seek sanctuary in a different country. They seek protection and once this is granted, they are classified as a **refugee** and are legally allowed protection and assistance. Refugees leave their home country out of fear of **persecution** due to their race or political or religious beliefs or to escape war or violence. In 2021 there were almost 32.5 million refugees across the world. Between 2015 and 2019, 1.4 million people crossed the Mediterranean Sea to escape conflict in Syria. They risked their lives in unseaworthy boats and dinghies in a dangerous attempt to reach Italy, Greece and Spain. Thousands have died while attempting this journey.

asylum seeker someone who leaves their own country, often for political reasons or because of war, and who travels to another country hoping that the government will protect them and allow them to live there

refugee a person who has escaped from their own country for political, religious or economic reasons or because of a war

persecution to treat someone unfairly or cruelly over a long period of time because of their race, religion or political beliefs

remittance money sent back to family in the migrant worker's home country

Interesting fact

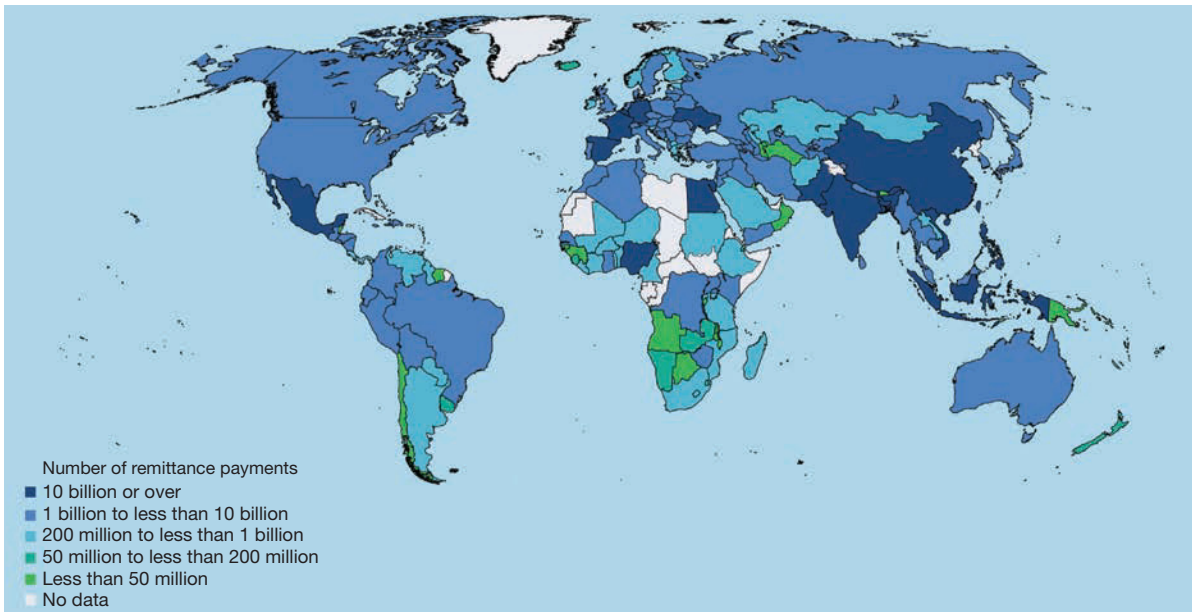
Studies have estimated that increased drought, catastrophic weather events and rising sea levels due to climate change could lead to the movement of 200 million climate refugees by 2050.

WHAT ARE THE IMPACTS OF INTERNATIONAL MIGRATION?

Migration leads to a range of positive and negative impacts both for the host and donor countries. One of the positive impacts for donor countries is the payment of **remittances**, which is money sent by migrant workers back to families in their home country. This can help reduce poverty, especially in poorer rural regions. Roughly one in every nine people around the world rely on remittances sent by migrant workers to support their health, education and nutrition. Unfortunately, in many cases this also means that families are temporarily separated. Upon returning home, many migrant workers bring new skills that can help to provide an economic boost to their communities. Many migrant workers returned home during the

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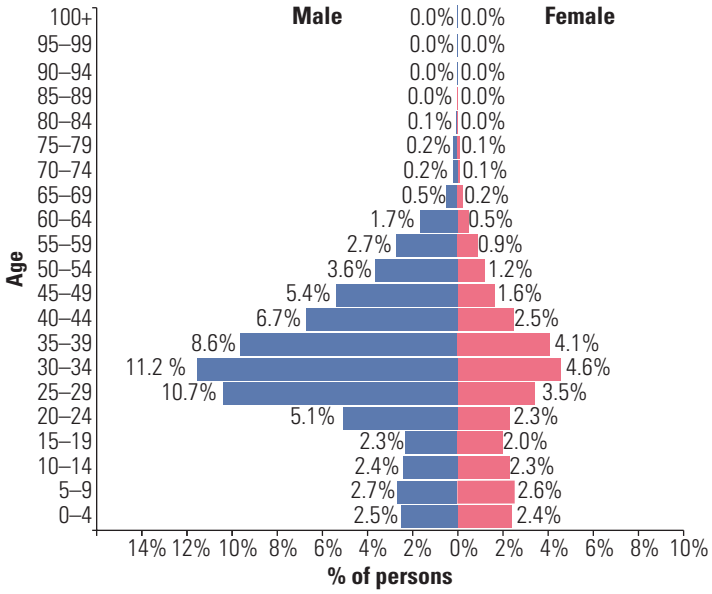
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▲ **Figure 5.62** The global distribution of countries receiving remittances
Source: United Nations, Department of Economic and Social Affairs, Population Division (2019), International Migrant Stock 2019.

COVID-19 pandemic while others were not able to migrate due to travel restrictions. This had a devastating impact on families relying on remittances for their survival and wellbeing.

The immigration of workers can help to fill labour shortages in highly skilled areas. For example, a migrant doctor might fill a position in a rural area. In wealthier countries, migrants also often fill less desirable and lower-paid positions. Unfortunately, many unskilled workers are forced to work in very poor conditions. Positive social impacts of immigration include a more diverse culture; however, this can also lead to conflict between people of different cultural and religious groups. Depending on how it is managed, an influx of migrant workers can also lead to overcrowding and increased costs associated with services such as health care. Remittances sent home lead to negative economic consequences in the host country, as earnings are not spent in the local economy.



▲ **Figure 5.63** The population pyramid (of 9 991 083 people) of the United Arab Emirates in 2021

The United Arab Emirates has a very high concentration of migrant workers: 80 per cent of the population. The majority of these workers are middle-aged men from places such as India and Pakistan. The influx of these people has led to a very uneven population structure. Figure 5.63 shows a very high proportion of males aged between 20 and 64 compared to females. This gender imbalance of 2.7 males for every one female is leading to a range of negative psychological consequences.

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ACTIVITY 5.24
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Interpreting population pyramids

Figure 5.63 is an example of a population pyramid or population structure. These graphs reveal the age–gender structure of a country's population. They display the proportion of the population in five-year intervals. Each interval is divided into males and females.

Visit the Population Pyramid website (populationpyramid.net).

1 Locate population pyramids for other Middle Eastern countries such as Saudi Arabia, Qatar and Yemen. **Compare** their population pyramid and state whether or not they have a similar basic shape.
2 Locate a population pyramid for a European country and **compare** it to one in Africa. **Identify** the differences between your two pyramids and **explain** one or more of the causes for their differences.
3 **Select** a country and change the year to see how its pyramid has changed over time and how it is expected to change in the future. **Propose** a list of factors that might be responsible for these changes and **explain** the reasons why.

International migration to Australia

HOW MANY INTERNATIONAL MIGRANTS ARE THERE IN AUSTRALIA?

Australia is one of the most culturally diverse countries in the world. International migration has been a significant part of our development since European settlement in 1788. Australia's migration history involves the penal transportation of convicts, the gold-rush era beginning in 1851, postwar immigration following World War II, the current migration program and the humanitarian programs involving the settlement of refugees. In 2019, there were around 7.5 million migrants living in Australia from 150 different countries. This is a significant increase from less than 4 million in 1990 (see Table 5.13). Together, international migrants make up 30 per cent of Australia's total population. Furthermore, 19 per cent of people born in Australia have at least one parent who was born overseas. Table 5.14 shows that English-born migrants are still the greatest proportion of migrants, although there is an increasing number coming from China and India.

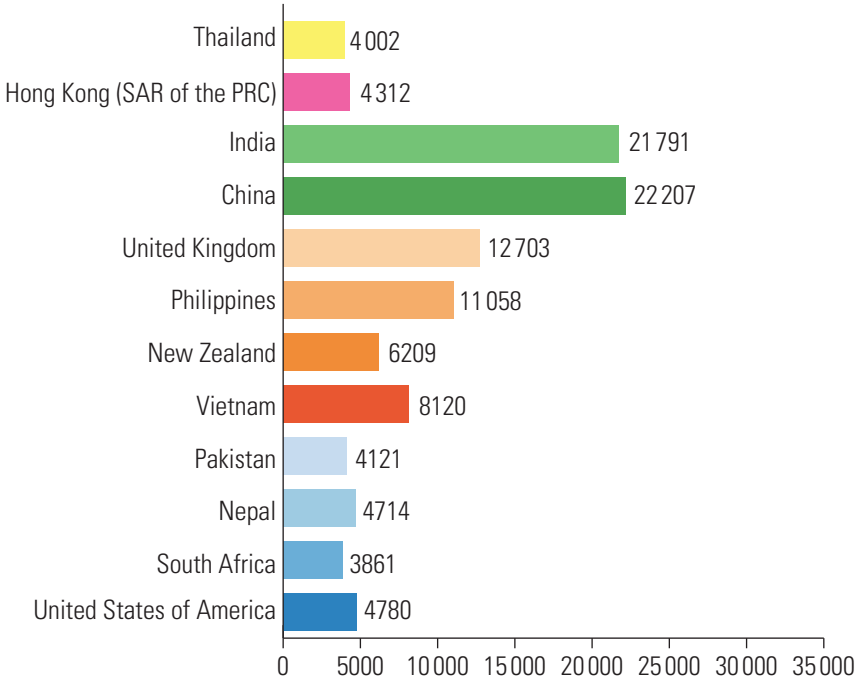
▼ **Table 5.13** The number of international migrants living in Australia and the percentage of Australia's population that are international migrants between 1995 and 2021

	1995	2000	2005	2010	2015	2019	2020	2021
International migrants (000s)	4153.3	4386.3	4878.0	5883.0	6729.7	7549.3	7654.0	7502.5
Share of population (%)	23.1	23.1	24.2	26.6	28.1	30.0	29.8	29.1

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▼ **Table 5.14** The origins of the largest groups of Australia's migrant population during 2021

Country of birth	No. of persons	%
England	967 390	3.8
India	710 380	2.8
China	595 630	2.3
New Zealand	559 980	2.2
Philippines	310 620	1.2
Vietnam	268 170	1
South Africa	201 930	0.8
Malaysia	172 250	0.7
Italy	171 520	0.7
Sri Lanka	145 790	0.6
Total overseas-born	**7 502 450**	**29.1**



► **Figure 5.64** The top 10 countries of origin for migrants to Australia during 2020–21

ACTIVITY 5.25

Comparing geographical data

Compare the data in Table 5.14 and Figure 5.64. **Identify** whether the origins of international migrants that immigrated to Australia in 2018–19 are similar or different to the origins of the total migrant population.

ACTIVITY 5.26
DEVELOPING GEOGRAPHICAL CONCEPTS AND SKILLS

Drawing and interpreting line graphs

Figure 5.65 is an example of a line graph. Geographers use line graphs to show change over time. This can allow us to analyse trends and project future trends. When drawing a line graph, measurement of

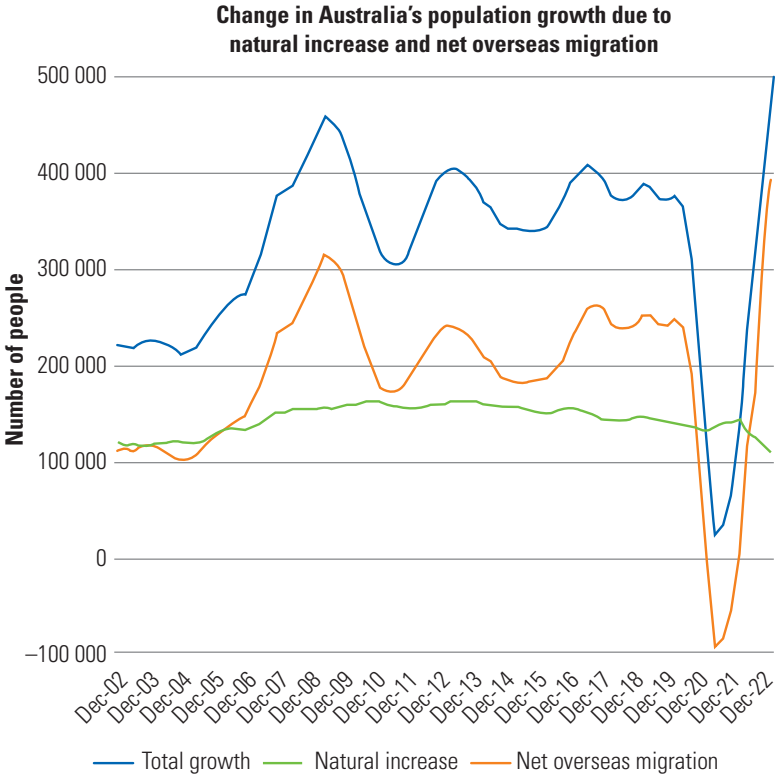
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time (such as years) should always go on the *x* (horizontal) axis. The variable that is changing goes on the *y* (vertical) axis. Both axes need to be divided into even increments and clearly labelled. Once you have set up your axes, plot each data point on the graph and then join the dots using a straight line.

1 **Create** two line graphs using the data from Table 5.13: one for the change in the number of migrants and one for the change in the proportion of migrants.
2 **Describe** the trend shown in both graphs by considering:
   - The trend of the graph (increasing or decreasing)
   - The periods of faster or slower growth (indicated by the steepness of the graph).
3 **Describe** a factor that might have caused the changes you have described in Question 2.

WHAT IS THE RATE OF MIGRATION IN AUSTRALIA?

The number of migrants moving to and leaving Australia varies each year. As such, the level of net overseas migration also changes. Figure 5.65 shows the contribution that migration has had on Australia's population growth since 2002. While the level of natural population growth has been stable, the level of net migration has varied considerably. In the three months prior to 31 March 2021, Australia's net overseas migration had dropped to 94 326. This was a decrease of 139 per cent from the same period in the previous year. The closure of Australia's borders at the height of the COVID-19 pandemic had a significant impact on overseas migration and in the period more people left the country than entered it. Net overseas migration remained negative until the end of 2021. In 2022, these figures started to increase again.



▲ **Figure 5.65** The change in the growth of Australia's population due to natural increase and net overseas migration

ACTIVITY 5.27

Interpreting a line graph

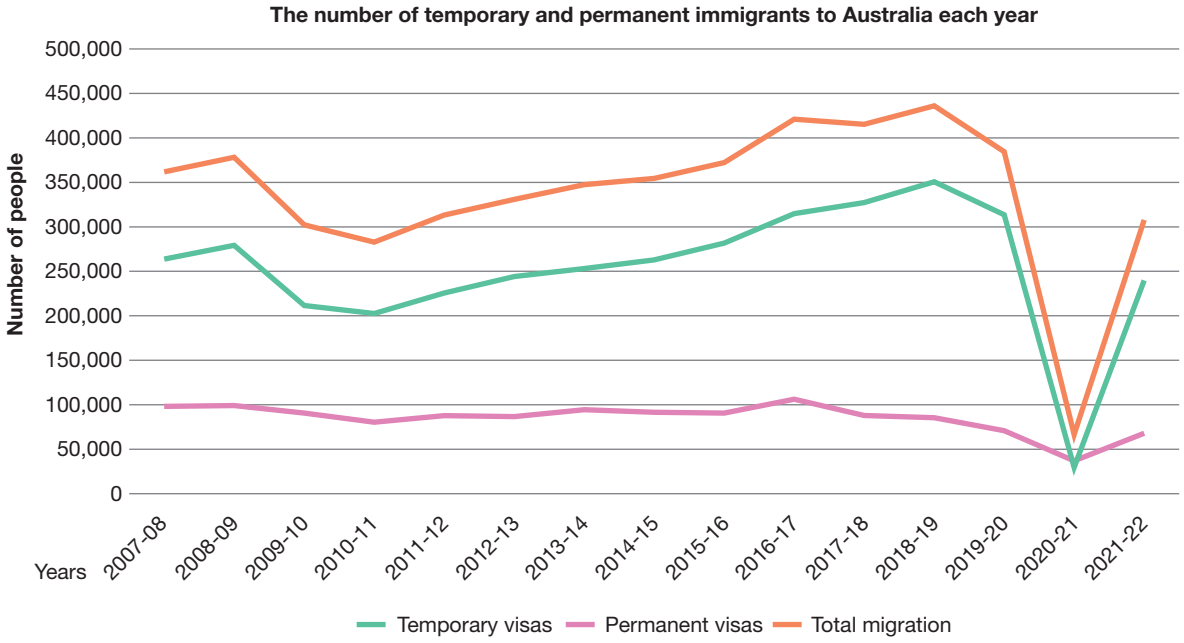
Examine Figure 5.65 and **apply** this data to answer the following questions.

1 **Identify** which years had the greatest change in total population growth.
2 **Decide** whether this change was primarily due to migration or natural population growth.
3 **Identify** what proportion of growth in 2022 was due to migration.
4 **Explain** how this proportion has changed since 2002.

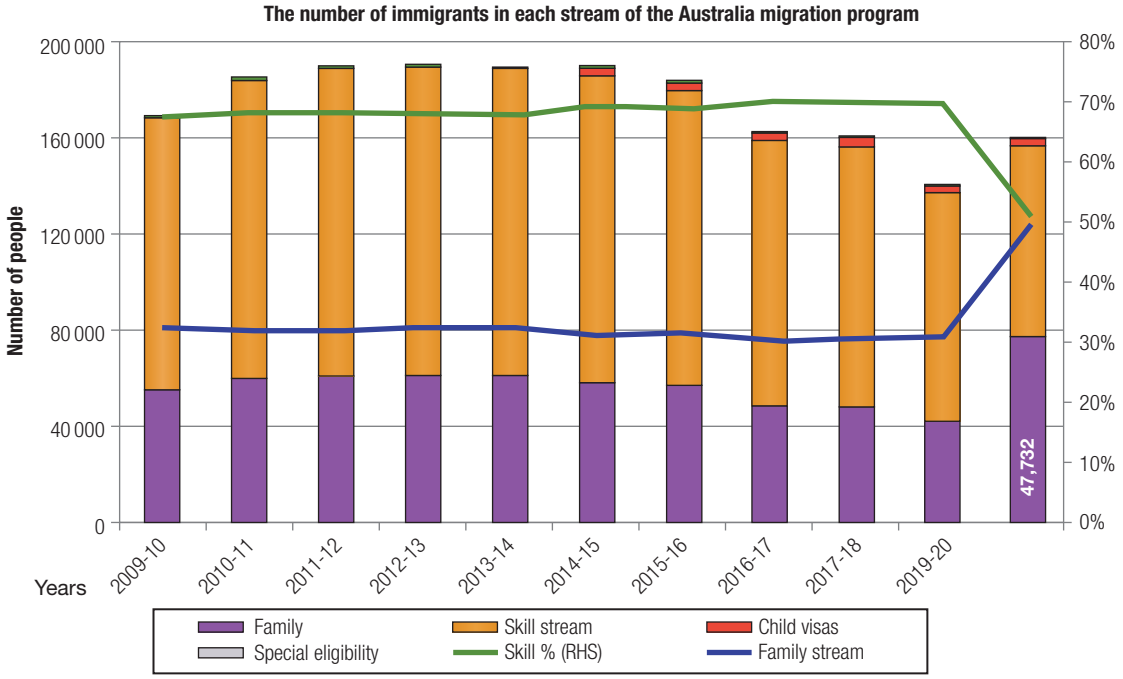
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AUSTRALIA'S MIGRATION PROGRAM

Each year, the Australian Government allocates the number of places available for people wishing to migrate temporarily and permanently under the migration program. This includes skilled workers who are coming to fill skilled labour shortages, and family migrants for those who wish to migrate to be with family and foreign students. The government sets a migrant quota, which includes the number of permanent and temporary visas that will be allocated in each stream. Figure 5.66 and Figure 5.67 show how this number has changed over time. Migrants can apply to become Australian citizens after they have lived here for at least four years. Applicants aged 18 and over must sit a citizenship test that assesses English-language skills and knowledge about Australia.



▲ **Figure 5.66** The number of temporary and permanent immigrants that migrate to Australia each year, and the total migration numbers each year



▲ **Figure 5.67** The number of immigrants in each stream of the migration program

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ACTIVITY 5.28

Becoming an Australian citizen

1 Complete the Australian citizenship practice test on the website of the Department of Home Affairs.
   a **Reflect on** this test and **consider** whether or not you think it is a fair and accurate way of determining whether a migrant should be allowed to become an Australian citizen.
   b Develop three additional questions that you think should be on this test.
2 **Interpret** the data from Figure 5.66 and Figure 5.67 to **determine** how the number of immigrants and the types of immigrants entering Australia have changed over the last decade.

AUSTRALIA'S HUMANITARIAN PROGRAM

Australia's humanitarian program involves **resettling** refugees who are seeking protection in Australia. It involves helping offshore refugees arriving from other countries who are in desperate need of settlement in Australia, and refugees who have already arrived in Australia who require further protection. Since World War II, Australia has resettled more than 880 000 refugees, and 18 750 places were allocated to the humanitarian program in 2019–20.

resettlement the transfer of refugees from the country in which they have sought refuge to another country that has agreed to have them

Refugees seeking entry into Australia must satisfy criteria based on the severity of the persecution they have faced, the extent of their connection with Australia, whether or not there are settlement options in other countries, and whether or not Australia has the capacity to provide support for them. Part of this process involves offshore detention, where asylum seekers are moved to other countries while their application for refugee status is processed. Australia is the only country in the world with an offshore detention process. This policy has been widely criticised because many refugees spend several years in detention centres in places such as Nauru while their claims are processed. These people have often been forced to live in inhumane and psychologically damaging conditions. A number of directly and indirectly related suicides have been attributed to these living conditions.



▲ **Figure 5.68** Thousands of protesters at Sydney Town Hall demonstrating against offshore detention in August 2016



▲ **Figure 5.69** One of the refugee detention centres on Nauru

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THE IMPACTS OF INTERNATIONAL MIGRATION TO AUSTRALIA

Since European settlement, migration in Australia has had a wide range of impacts. Some of the more recent impacts are listed in Table 5.15.

▼ **Table 5.15** A range of impacts associated with international migration

	Positive	Negative
Environmental	Migrants who choose to settle in rural areas can bring new life and money to smaller towns and cities.	Migrants tend to settle in capital cities, leading to pressure on housing availability, congestion, infrastructure and services.
Economic	Migrants are often hardworking and willing to take on a range of necessary jobs. Migrants, highly skilled or not, can fill labour shortages in a range of industries.	Non-migrants are sometimes worried that migrant workers will take jobs they feel should be reserved for them. Some non-migrants resent that migrants who become citizens eventually retire and are eligible for **social security**.
Social	Migrants bring cultural and religious diversity.	Clashes of cultures can lead to racism, conflict and difficulties with **integration**.

social security payments from the government to people without an income, such as Australia's aged pension

integration the adoption of other cultures into a society as equals

sustainable the ability to be maintained at the same rate without impacting the future

Many of the negative impacts of migration stem from increases in population. Many believe that Australia cannot sustain its population growth, especially as its citizens get older and require health care and social security payments. Others argue that migrants provide an essential boost to the Australian economy by paying tax and supporting industries. It is estimated that migration overall contributes one per cent to Australia's total gross domestic product (GDP). The quota allocated for the migration program each year is determined based on these factors, ensuring that the amount of immigration is **sustainable**.

One of the more obvious impacts of international migration is the influence it has on Australia's diverse and dynamic culture. Many groups of migrants choose to live in clusters of suburbs to be close to family and friends and to assist in their integration into Australian life. An influx of Chinese immigrants during the gold rush in the 1850s led to the establishment of Melbourne's Chinatown within the Central Business District. It contains a range of Chinese restaurants, businesses, places of worship and cultural sites such as the Museum of Chinese Australian History. It also hosts cultural celebrations such as Chinese New Year.

Fortitude Valley in Brisbane also features its own Chinatown (Figure 5.70) which was opened in 1987. In contrast to Melbourne's Chinatown, it contains many varieties of Asian restaurants including Chinese, Korean, Indonesian and Vietnamese. It also contains influences from India. Each year, it holds the Indian festival of Diwali featuring Punjabi bhangra dancing, Bollywood demonstrations and

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▲ **Figure 5.70** Chinatown in Brisbane's Fortitude Valley is a centre for Asian restaurants, retail and cultural events.

musical performances. The impact that migration has on the merging of cultures was celebrated at the 2019 festival when a fusion group, OzIndia, blended the traditional music of Aboriginal Peoples and India in a contemporary performance.

While some argue that these cultural clusters help immigrants to adjust to Australian life and to find work and support, others argue that these clusters do not allow immigrants to integrate into Australian culture and create a cultural divide.



▲ **Figure 5.71** Restaurants in Chinatown in Fortitude Valley, Brisbane.

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DEVELOPING YOUR UNDERSTANDING 5.3

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** the term 'internal migration'. In your definition, include types of internal migration and examples.
2 **Explain** the term 'international migration'. In your definition, include types of international migration and examples.
3 **Create** a table to classify the following examples of migration as being rural to urban, urban to rural, intra-urban, inter-urban, interstate:
   a Tasmania to South Australia
   b Tumut to Newcastle
   c Melbourne to Newcastle
   d Brisbane to Stanthorpe
   e Indooroopilly to Bracken Ridge.
4 **Explain** the difference between a migrant, immigrant, emigrant, refugee and asylum seeker.

Interpret

5 **Explain** the impact that internal migration can have on population structures in rural and urban areas.
6 **a** Using the information in Figure 5.51, **describe** how the population growth rate of the Pilbara region has changed over time.
   b **Propose** an impact that this might have on the economy or liveability of the region.
   c **Describe** the population pyramid of the Pilbara region shown in Figure 5.52.
   d **Propose** a reason for this population structure and **reflect on** the social impacts it might have on the region.
7 **Describe** how international migration to Australia is changing over time, including the number of migrants, the proportion of the population who are migrants and the origin of migrants.

Argue

8 **Discuss** the ways in which the *hukou* impacts on Chinese migrants and how relaxing this system might help to reduce the impacts of internal migration.
9 In a paragraph, **discuss** whether or not Australia should maintain its current level of immigration. **Consider** both positive and negative impacts in your discussion.

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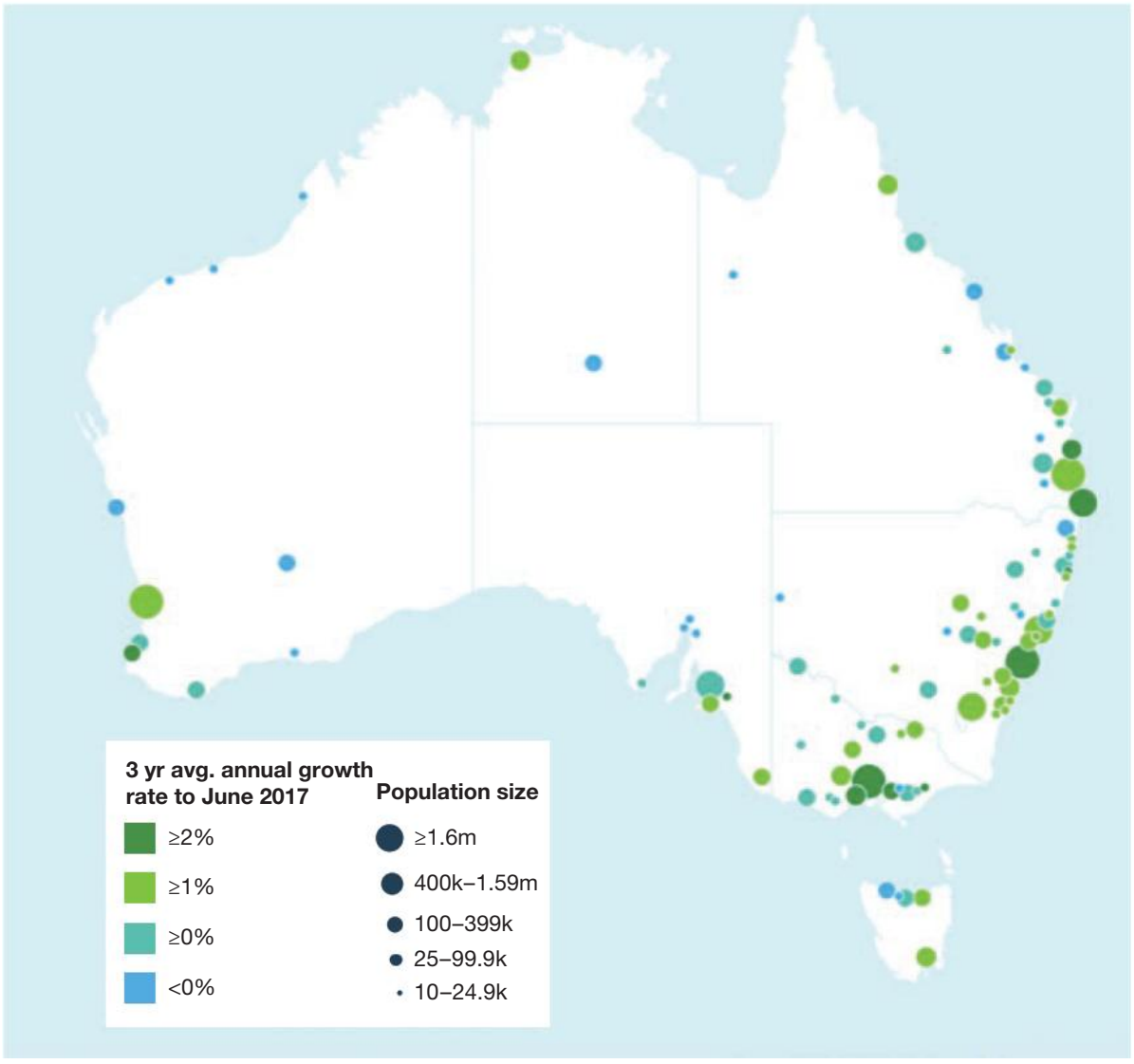
5.4 Strategies to manage the sustainability of Australia's changing urban places

FOCUS QUESTION

What challenges does Australia face in managing its urban future?

The Australian Bureau of Statistics projects that Australia's population could reach as high as 31 million by 2031. Sydney and Melbourne are both expected to exceed 6 million while Brisbane's population will reach 3.2 million. Most of this growth will occur in urban areas. This rapid growth is creating a number of management challenges:

- There is rising inequality between inner suburbs and the outer fringe areas in terms of access to services such as education, transport and health care.



▲ **Figure 5.72** The distribution of Australia's population growth

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- Urban sprawl is spreading into surrounding agricultural land, which is reducing food production.
- Housing is becoming less affordable in capital cities.
- Congestion is increasing on both the roads and public transport networks.
- Rapid migration is increasing demands on infrastructure.
- Waste management and recycling is becoming more difficult to manage.
- Many cities face water scarcity during times of drought.

New government policies have been suggested to respond to some of these challenges. For example, urban growth could potentially be slowed by settling migrants in rural areas and smaller towns to avoid congestion in capital cities. This will also require financial investment in regional areas to ensure they can cope with the subsequent growth. Congestion within dense urban areas could also be reduced by introducing a congestion tax for those driving within the CBD of Melbourne and Sydney. Similar taxes have been successful in other cities including London, Stockholm and Milan. *Planning for Australia's Future Population* is a publication by the Australian Government released in 2019 that highlights some of the issues facing Australia's future growth and ways in which the government is attempting to ensure growth is economically, socially and environmentally sustainable.

CASE STUDY 5.2

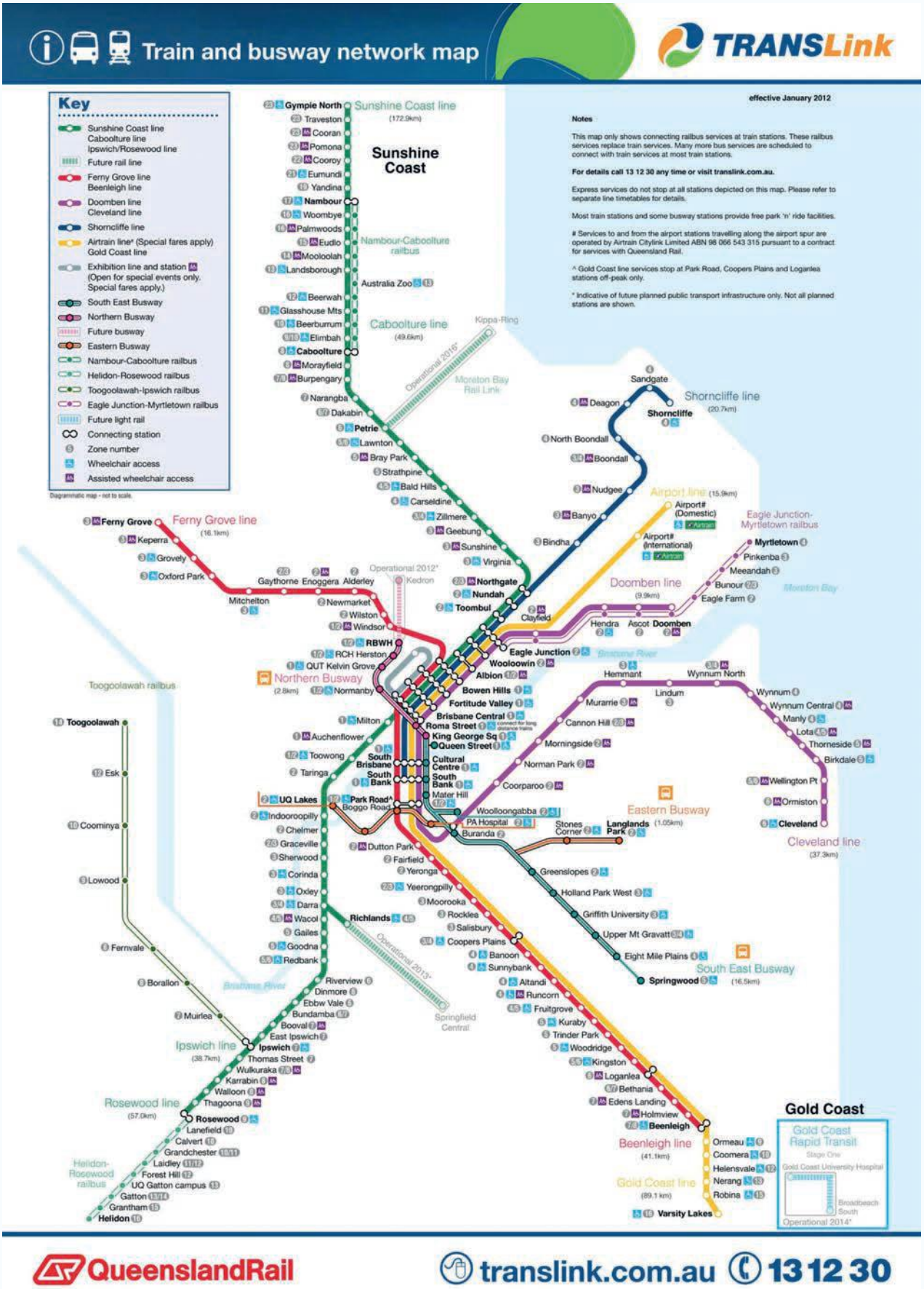
Brisbane's South East Busway



▲ **Figure 5.73** Artist's impression of part of Brisbane's Metro

Brisbane's South East Busway was completed in 2001. It is a separate bus-only road that runs from Eight Mile Plains to Brisbane's Central Business District. A further bus station linked to this network has been constructed in Springwood. It is part of a wider 27-kilometre bus transport network which includes the Eastern Busway and the Northern Busway. It is estimated that this part of the network carries 70 million passengers annually. In the coming years, this network will become part of Brisbane's Metro network. This will boost the capacity of the network and improve public transport and therefore sustainability in the growing city.

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▲ **Figure 5.74** Brisbane's transport rail and busway network

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Please see the Interactive Textbook to download a fieldwork template

ACTIVITY 5.29
FIELDWORK

Determining the success of urban management

Fieldwork is an essential part of studying Geography. It enables you to investigate many of the concepts studied in the classroom while in the real world. In this investigation, your aim is to determine whether or not the management of people and infrastructure within a local urban area is successful and sustainable. You will need to select a local urban area to investigate.

The following structure will help to form the basis of your study:

Title and introduction

Introduce your study by providing some context. This should include the location that you are investigating and the type of management you will be evaluating. For example, you could focus on how frequent and accessible local bus and train services are, or you could investigate the facilities at a local park and observe how they are used.

Background information

Research some background information about your chosen location including population trends, geographic characteristics and history. Include a location map showing the boundaries of your study area.

Aim

Write an aim for your fieldwork that is achievable based on the data that you intend to collect. For example: to determine the sustainability of transport in the outer suburbs of Brisbane.

Research question

Write a research question that you intend to answer using the data that you collect. Your research question should be specific to your particular chosen location. For example:

- Is the urban development surrounding Ipswich environmentally, economically and socially sustainable?
- Is Brisbane's train network accessible and efficient for all people throughout the city and how is this likely to change in the future?
- How is the style of housing changing in the Gold Coast and what are the positive and negative impacts of this trend?
- How does the success of urban development differ between Kenmore and Woolloongabba and what are the reasons for their similarities or differences?

Primary data collection

Primary data refers to data that you collect yourself while in the field. **Consider** the types of primary data that you will need to test your hypothesis and answer your research question. Examples include:

- Interviews with councillors, local businesses and local residents
- Surveys of local residents
- Traffic and public transport assessments
- Mapping of access to local services and infrastructure
- Annotated photographs and field sketches.

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What equipment will you need? Will you have enough time to collect it? At which locations will you collect it? **Consider** using spatial technology such as ArcGIS Survey123 or Avenza Maps to help with the efficiency and accuracy of data collection and to assist with data analysis.

Secondary data collection

Secondary data is data that you collect via research which was previously collected by someone else for an additional purpose. Examples include:

- Spatial data collected from GIS (Geographic Information System) websites, such as NationalMap and AURIN Map, which provides information about local demographics, projected population changes and environmental, economic and social conditions
- Current and past satellite images collected using Google Earth Pro, which can be annotated with pins and polygons
- Government and council websites such as the Australian Bureau of Statistics or Brisbane City Council.

Analysing and presenting your data

Summarise your data using tables, graphs and maps where appropriate. **Analyse** and discuss your data to draw conclusions and answer your research questions. **Consider** the best way to present your data such as a report, oral or multimedia presentation or as an ArcGIS StoryMap combining text, interactive maps and multimedia.

Conclusion and evaluation

Summarise your findings by identifying a geographic challenge associated with your research. Provide a recommendation to address this challenge.

References

Always ensure you keep a record of any sources used and present these in a bibliography.

DEVELOPING YOUR UNDERSTANDING 5.4

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Identify** the projected future population of Australia by 2030.
2 **Describe** three of the management challenges caused by rapid population growth.
3 **Describe** two ways government policies could respond to these challenges.

Interpret

4 **Identify** and **explain** which of the management challenges facing Australia's urban areas are the most and least significant and **justify** your decision.
5 **a** Using Figure 5.72, **describe** the spatial distribution of Australia's population growth. Use Google Maps or a map of Australia to **identify** the names of places shown.
b Based on this distribution, **explain** whether Australia's population growth is occurring predominantly in rural or in urban areas.

Argue

6 In a paragraph, **discuss** the advantages and disadvantages of population growth in urban areas.

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End-of-chapter assessment

1 Making thinking visible

I used to think … now I understand …

Throughout this chapter you have learned about various types of migration and their impacts. Using the following sentence stems, write a short paragraph to **explain** your understanding of migration. Examples of possible things you might have thought have been given.

1A I used to think that Australia had only a small number of international immigrants.

1B Now I understand that …

2A I used to think that the migration of people within Australia didn't have any impacts.

2B Now I understand that …

3A I used to think that refugees were migrants choosing to enter a country illegally.

3B Now I understand that …

4A I used to think that all of China was densely populated without much difference between regions.

4B Now I understand that …

2 Research task

Select one of the cities discussed in this chapter or another of your choice and prepare a case study using research. The Atlas of Urban Expansion is a good website to start with. Use the following guidelines to organise your research.

- Where is your city located, how big is it, what is its population and population density?
- How fast is your city growing and what is its future projected population?
- Using Google Earth, find satellite images that demonstrate the growth of your city over time.
- What management challenges is your city currently facing?
- What strategies is your city implementing to try to overcome some of these challenges?

Develop additional research questions specific to your city and use these to form the subheadings for a presentation or report.

3 Extended-response questions

'International migration has positive impacts for both the host and donor countries and should therefore be increased.' **Evaluate** this statement and **discuss** to what extent you agree with it, making reference to examples provided throughout this chapter.

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4 Problem-solving task

Select one of the cities presented in this chapter, or another of your choice. **Design** a strategy to manage its urbanisation and urban development. **Consider** whether or not your strategy is economically, socially and environmentally sustainable or what the challenges might be in implementing your strategy. **Predict** the likely success of your strategy and propose a list of criteria that could be used to evaluate its success.



▲ **Figure 5.75** Rooftop vegetable gardens and bicycle couriers are two ways to improve environmental and social sustainability within cities.

Digital resources

Visit the Interactive Textbook or Online Teaching Suite to access:

- General Capability Project
- Interactive chapter Quiz
- Interactive Scorcher Quiz
- Videos, image galleries and other extra materials.

SCORCHER

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PART

3

Economics and Business

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What is Economics and Business?

When you visit a store, shopping centre or online business you might have taken a moment to notice the huge variety of goods and services available to you. Do you ever wonder where they come from? Are the goods locally produced? Are they Australian-made? Or have they come from overseas? How does our demand for a good influence the price of a product? How does it ensure that the demand for goods is always met?

The study of Economics and Business is important as it helps us develop an understanding of the market forces that influence our decisions as consumers and how those same decisions are made by businesses and governments. Some of the questions that get asked every day in our society include: how do producers satisfy our needs and wants? How do consumers decide what they will purchase? Many of these pivotal questions are based on several key influences including individual and company innovations, the level of production from the foreign market and government policies and regulations. As the Earth's resources are finite, governments, consumers and producers need to consider carefully the choices made to improve societal wellbeing.

Planning is essential for a successful business. Setting long-term and short-term goals is important for businesses and individuals. How do we make goals? What is a priority? Goals and priorities can take time to establish, but with careful planning, they can be achieved with great success. The more you understand how economic goals and planning work, the more you can apply it to your own life. You are also more likely to recognise these forces at work in larger society.



▲ **Figure 6A** Ever wonder about all the goods and services available to you at a shopping centre? Pictured is Brisbane Arcade Shooping Gallery.

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UNIT

1

Economics and Business



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Overview

Our society depends on the complex relationships between consumers, producers, governments and resources. There are many influences on a company that affect the work environment. Growing technology and increasing demands from consumers require innovators to exhibit behaviours and capabilities that help them to grow their business successfully and adapt to new opportunities in the market. In this unit, we will explore how contribution through creativity, work and decision-making promotes the wellbeing of society in general.

Learning goals

After completing this unit, you should be able to answer these questions:

- What are some of the different ways that businesses and individuals adapt to opportunities in the market?
- What are some of the ways that Australian businesses, including First Nations entrepreneurs, have developed opportunities in markets?
- What are some of the ways that individuals and businesses use planning and budgeting?
- What are some of the ways that markets influence decisions made by individuals, business and governments?
- What are some of the ways that the nature of work has changed?
- How does the work of government influence our economy and society through actions such as taxation?

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CHAPTER 6: Society and innovation

Setting the scene: Indigenous innovation with native health foods



▲ **Figure 6.1** Brisbane Broncos player and Indigenous entrepreneur Ryan James

Brisbane Broncos player Ryan James and Gold Coast's BSKT launch new native food range

Indigenous entrepreneur and Brisbane Broncos prop Ryan James will debut a new health food range in collaboration with Gold Coast-based cafe BSKT, packed with native ingredients.

Called BSKT Native, the health food range has been developed to celebrate all things indigenous to Australia, with a percentage of proceeds from sales of the products going to the Ryan James Foundation, which is aiming to promote circular economy principles in Indigenous communities.

Boasting unconventional native ingredients, the range includes a Davidson's plum granola, a finger lime and coconut superfood bar, and a chocolate bar which has saltbush mixed in.

'It all tastes great and we thought we could easily sell it to the Australian public and show them how these native ingredients can be added into everyday consumable goods,' the rugby league player said.

'Saltbush is more generally used on fish – to wrap them up and put them on the fire – so we thought it would be pretty cool to try and add it to chocolate.

'And then your finger limes are something that would traditionally be served alongside fish or with

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oysters, but we managed to put it into a superfood bar with coconut and other ingredients – there's plenty of native indigenous ingredients with great medicinal values.'

The entrepreneur, who is now also a co-owner of Mermaid Beach-based cafe BSKT, also hopes to eventually launch a tea following the Native brand launch on Friday, coinciding with the last day of NAIDOC week.

'The first people of Australia have a known history of living in union with their land,' James said.

'Their knowledge of the land has been passed from generation to generation for tens of thousands of years, including indigenous bush foods.

'As a proud Bundjalung man of northern NSW, I'm excited to showcase these Native foods to bring better health to customers in Australia and across the globe, whilst providing a circular economy and opportunities for my people.'

Involvement of Indigenous Australians was front of mind for James, who brought on Gold Coast artist and Wiradjuri woman Katrina Graves to design the packaging.

'I've always been encouraged to practise my culture and to teach others about our history and stories,' Graves said.

'For me, art is not only a powerful way to share our stories, it's a way to educate people through different lenses.

'The opportunity to work with the BSKT team allows for my art to tell a story about the land we live on and my ancestors' connection to food, health, and wellbeing; making this an incredibly rewarding project to be part of.'



▲ **Figure 6.2** The artist behind BSKT Native, Katrina Graves

Source: David Simmons, 'Brisbane Broncos player Ryan James and Gold Coast's BSKT launch new native food range', *Business News Australia*, 7 July 2022



ACTIVITY 6.1
MAKING THINKING VISIBLE

Think, puzzle, explore

BSKT Native's Indigenous business model has many different features. After you have read the 'Setting the scene' paragraphs, **consider** the questions below.

1. What does the information from the article make you think about how the business BSKT Native or the different individuals involve have adapted to opportunities in the market?
2. What questions do you have about how BSKT Native, Indigenous businesses or businesses in general can adapt to new opportunities in the market?
3. What information from the 'Setting the scene' paragraphs would you like to explore further?

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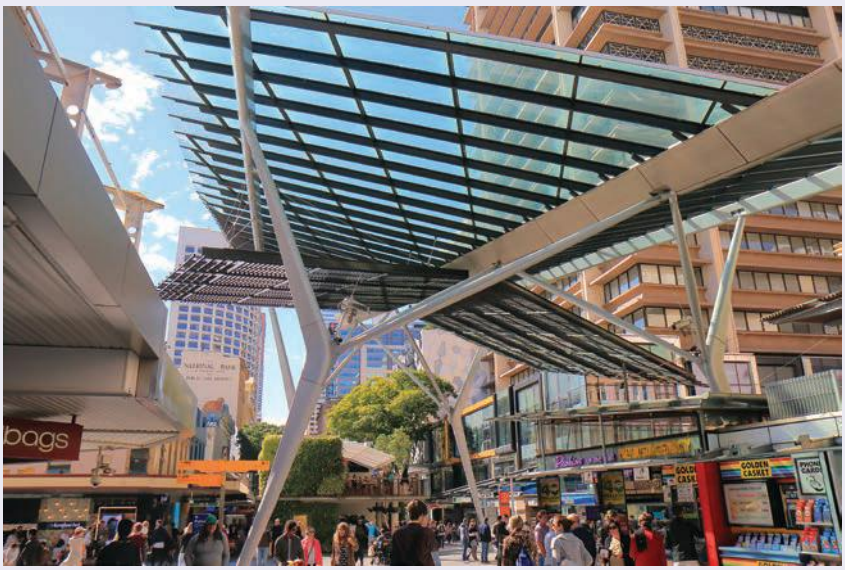
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Chapter overview

Introduction

This chapter focuses on how the decisions made by individuals, business, and government can influence the outcomes of societies overall goal, to increase the wellbeing of all in our economy. You will learn how markets influence decisions made by businesses and governments alongside how individuals make decisions, using present-day business examples. You will also learn about the importance of innovation in Australia and the government strategies put in place to encourage innovation in Australia. A business plan is vital for a successful business. You will learn about the different parts that make up a business plan and how many businesses have now incorporated social responsibility strategies as part of their operations.



▲ **Figure 6.3** Business forces are part of our everyday lives. It's important to understand how they work and how we can best fit into, or evolve, these systems.

ACTIVITY 6.2
MAKING THINKING VISIBLE

Connect, extend, challenge

Explore the information in the introduction along with Figure 6.3 to **reflect on** the following questions.

1. How does the introduction and picture connect with what you already know about the Australian economy?
2. What new ideas does the introduction and picture make you consider about the Australian economy?
3. What questions do you have about our economy based on the information in the introduction and picture?

Find a partner in the class and share your ideas on these questions.

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6

6.1 Opportunities in the market

FOCUS QUESTIONS

- How do businesses and individuals adapt to opportunities in the market?
- How do these adaptions to new market opportunities change the nature of work?

One of the most important ways that our economy, society, businesses, and individuals can adapt to new opportunities in the **market** is through innovation.

market the term used to describe the physical or virtual place where goods and services are bought and sold

innovation the development of a new idea or product

competitive advantage the conditions that make a business more successful than the businesses it is competing with, or a particular quality that makes it more successful

start-up company a new business in its initial stages of operation that is developing a product or service that is new and innovative

Innovation

Innovation is critical to the survival of a business. To innovate means to develop a new design, product or idea. Australian businesses need to innovate in order to stay competitive. Having a **competitive advantage** is beneficial to a business as it allows it to stay ahead of its competitors. Australian businesses in general and First Nations entrepreneurs specifically build innovation into their business models as a way of participating in current markets along with accessing and building new markets. A key strength of First Nations Australian businesses is the connection to country and place, and how the traditional knowledge from those places can form an important competitive advantage. Examples of some of the types of competitive advantages include traditional medicines and food along with the connection to the environment and cultural tourism. Case study 6.1 includes a more detailed example of how cultural knowledge can be an important competitive advantage.

THE IMPORTANCE OF INNOVATION

In May 2019, the Global Startup Genome Ecosystem report found that Australian cities Sydney and Melbourne had fallen in a global ranking of the best cities for **start-up companies**. A start-up is a new business in its initial stages of operation that is developing a product or service that is new and innovative.

The top cities classified as the best innovation hubs in the world include Silicon Valley and New York City in the United States, Amsterdam in the Netherlands and Bangalore in India. There is a strong contention that Australian businesses and start-ups lack government support due to the lack of accurate advice and support from grant bodies.

However, the Department of Innovation's *Australia 2030: Prosperity Through Innovation* document published in 2017 maintains that

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innovation is critical for Australia's future. There were five strategic frameworks recommended.

- **Education**: respond to the changing nature of work by equipping all Australians with skills relevant to 2030.
- **Industry**: ensure Australia's ongoing prosperity by stimulating high-growth firms and raising productivity.
- **Government**: become a catalyst for innovation and be recognised as a global leader in innovative service delivery.
- **Research and development**: improve effectiveness in increasing translation and commercialisation of research.
- **Culture and ambition**: enhance the national culture of innovation by launching ambitious national missions.

CASE STUDY 6.1

A new way to explore Australia's most mysterious region

At the far northern tip of Australia is one of the country's least-visited and least-understood regions.

But that's about to change, thanks to local Indigenous entrepreneurs like Fraser Nai.

The Torres Strait comprises 247 islands at the northernmost tip of Queensland, near Papua New Guinea. The Torres Strait Islanders who live there are of Aboriginal, Melanesian and Australian background. Arguably the most famous Torres Strait Islander in the Western World is the US NBA's Patty Mills, who plays for the Brooklyn Nets.

Many of the islands are volcanic, and set amid brilliant turquoise water they create an incredible landscape. And it's one that now has become a bit easier for non-Torres Strait Islanders to visit and experience thanks to a first-of-its-kind day trip from Cairns, the Queensland city best known for being the gateway to the Great Barrier Reef.

'We're not in the tourism business, we are in the people business. We just happen to serve tourism experiences,' says Nai, the co-founder of Straits Experiences, a locally led and operated business that brings people to the Torres Strait.

A Torres Strait Islander, his people are the owners and stewards of Masig Island.

As a long-time member of local government in the area, he has witnessed how giving people access



▲ **Figure 6.4** Visitors are treated to a traditional musical performance when they arrive.

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to more opportunities – especially in rural areas with fewer jobs and less access to different industries – can be transformative.

But he has also seen the way that Cairns and the Barrier Reef have swelled with tourists, which can lead to erosion and crowding, so he's trying to walk a middle path.

Opening up tourism in the more rural parts of the Torres Strait will create more opportunities for young people, but years of watching how other destinations have handled the industry means they can make smart decisions for long-term sustainability.

They're also investing in one of the region's greatest assets – its people.

'We still operate with our values,' he explains. 'We work with first and foremost our community, our elders and our leadership, because this is about them.'

Through Straits Experiences' one-day 'A Strait Day' tour (Video 6.1), visitors get what Nai dubs 'an injection' of local culture and history.

Source: Lilit Marcus, 'A new way to explore Australia's most mysterious region', CNN Travel, 20 June 2022

▲ **Video 6.1** 'A Strait Day' tour

ACTIVITY 6.3
MAKING THINKING VISIBLE

Question starters

After reading Case study 6.1, **consider** the following question starters.

- Why do you think Fraser Nai and the Straits Experience began to innovate in the tourism market?
- What examples of new ideas or innovations can you see in the article?
- Why do you think the Straits Experience might be more successful than other tourism-based businesses that offer similar products?
- What outcomes exist for the wider community from the creativity of Fraser Nai?
- What challenges might Fraser Nai experience with the new business?
- What advantages does Fraser Nai and the new business have?

Compare your thinking and answers around these question starters with some of your peers.

The economic resources or inputs in the production process are land, labour, capital and enterprise. When new opportunities in the market open, many individuals or businesses might consider adaptions to these processes to take advantage. These types of individuals are called **entrepreneurs** as they have the **enterprise** for the management of a business – it requires the right kind of person who can coordinate all four inputs in order to produce goods and services at a profit.

An entrepreneur is a person who makes decisions, persuades others to support their goals and can manage business risks efficiently. The word 'entrepreneur' is French in origin, devised by the economist Jean-Baptiste

entrepreneur a person who operates, organises and assumes the risk of a new business

enterprise the knowledge and skills used by owners of businesses and managers to coordinate the production process of goods and services

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Say, and translates to mean 'to undertake'. Entrepreneurs start new businesses to achieve a goal which could be financial or aimed at charitable areas, often at the risk of losing their capital, time and effort.

Many entrepreneurs borrow money from a bank or invest their own savings in order to start a business. It is important to have the right mindset to make a business successful, as it is a huge undertaking. Many new businesses fail within the first few years of operation. Entrepreneurs must be enterprising people who are able to take risks to capitalise on opportunities in the market or be flexible to adapting to changes in the economy. It is important that entrepreneurs have the right entrepreneurial **skills** or **attributes** that help make their businesses successful. Some of these skills are listed in Table 6.1. Having great **communication** skills is vital for any entrepreneur. There are three types of communication – verbal, non-verbal and written. An effective manager uses easy-to-understand language to communicate with staff and customers. Clear professional language is also used when dealing with the public. This can be seen in a company's letterhead, website, logos, slogans and emails. Ideas are expressed without ambiguity to promote understanding.

skill a particular ability developed through training and experience that is useful in a job

attribute personality trait

communication the process of sharing information, especially when this increases understanding between people or groups

Body language and **professional dress** are examples of non-verbal language and they reflect the company's approach in dealing with customers and staff. We will be reviewing how some of these attributes can help establish enterprising behaviours and capabilities in later sections.

body language the movements or positions by which you show other people your feelings without using words

professional dress wearing appropriate clothes for a business setting to present a professional image



▲ **Figure 6.5** Modern entrepreneurs don't have to work out of traditional office spaces, with digital offices, Working From Home (WFH) and shared workplaces becoming popular.

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▼ **Table 6.1** Examples of entrepreneurial skills

Initiative	Displays a self-starter approach by being proactive in pursuing goals
Leadership	Sets a strong direction for the business by guiding employees to achieve the vision and business goals of the company
Problem-solving	Works through issues in a methodical manner by listing and evaluating solutions
Risk-taking	Creatively works on different initiatives to start a business or increase profits within a business
Communication	Displays good interpersonal skills in spoken and written communication
Negotiation	Uses communication skills between two or more parties to assess different needs and goals in an issue, in order to find a mutually acceptable decision or solution

CASE STUDY 6.2

Boost Juice

Janine Allis is the founder of Boost Juice, the iconic Australian fruit juice brand. She started the business with her husband Jeff in 2000 with a store in William Street, Melbourne. Its success allowed them to open up three new sites shortly after but not without trouble. With their shiny new juicers refusing to work, their staff had to dash off to stores to buy domestic blenders to use, which worked well only for a day. However, it allowed them to carry on the business while new equipment was on the way.



▲ **Figure 6.6** Boost Juice CEO Janine Allis

Boost Juice now boasts more than 500 stores worldwide. The team recently opened its 250th store in Australia. Success did not come easy for Janine. In an interview with Smartcompany in 2013, she stated, 'For me, success or failure has been down to the people I've surrounded myself with. Some people are only half full, they live in fear. But as an entrepreneur you need to find the people that say "Give it a go". Find people who support the idea, have started their own business intelligently and are ahead of the curve'. Janine also believes that a great leader is someone who actualises their company's vision, knows where it is going, and has great communication skills.

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ACTIVITY 6.4
MAKING THINKING VISIBLE

Sentence, phrase, word

After reading Case study 6.2, **consider** the questions below.

1 **Select a** sentence from the text that you feel identifies a business innovation or entrepreneurial skills.
2 **Select** a phrase from the case study on a business innovation or entrepreneurial skill which interested you.
3 **Select** a word from the case study that you feel is important when discussing new opportunities in markets.

Compare your thinking on this topic with some of your peers.

DEVELOPING YOUR UNDERSTANDING 6.1

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** what an entrepreneur is.
2 **Explain** what an enterprise is.
3 **Describe** what an attribute is and give an example.
4 **Describe** the skills that make an entrepreneur successful.

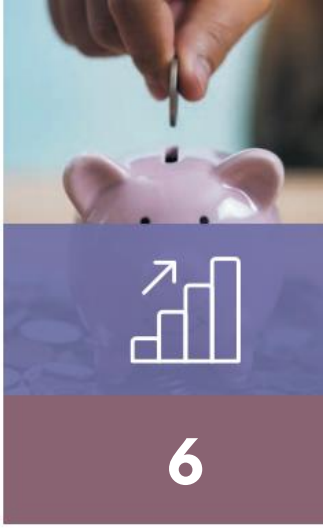
Interpret

5 Re-read the five strategies identified in Australia 2030: Prosperity Through Innovation. Highlight any words that you are unfamiliar with and find the meaning of these words by creating a glossary. **Explain** one way in which each of the five strategies can be achieved using innovative ideas.
6 You have read the case studies on the Straits Experience and BSKT. **Explain** which of the skills of Fraser Nai and Ryan James you view as important to the future successes of their businesses. **Use** an example from each of the businesses as part of your answer.

Argue

7 Read Case study 6.2, **conduct** further research online and answer the following questions.
   a What attributes does Janine possess that make a successful entrepreneur?
   b If sales decline, what entrepreneurial characteristics or skills could help Janine to save her business?
   c Janine has decided to introduce a sandwich bar to each of her stores. What are the risks of this idea? **Explain** your reasoning.

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6

6.2 Planning and budgeting

FOCUS QUESTIONS

- What processes do individuals and business use to plan to achieve short- and long-term objectives?
- What is the importance of budgeting for a business to achieve short- and long-term objectives?

Interesting fact

The inflatable aircraft escape slide used on thousands of aircraft around the world was invented by Jack Grant, who was an employee of Qantas in 1965. The invention helps passengers to exit the plane safely if a plane lands on water or ice, and can also be used as a flotation device.

Innovation in the economy cannot happen without three key areas: clarifying goals and objectives, planning the start-up of a new business and budgetary planning. This section describes many of the variables that businesses and individuals need to consider as part of these important steps.

Business goals and objectives

A successful business has goals and objectives, and they are different. A business **goal** is a general statement of the desired achievement of a business. It is a broad aim that is established when you start a business. A business **objective** is a step that a business undertakes to achieve its goal. It is a specific milestone that is achieved over time. For example, a business goal could be to increase profits by 10 per cent by the end of the financial year. A business objective to achieve this could be to increase advertising or reduce production costs.

Many businesses use the SMART criteria to establish goals. Goals need to be specific, measurable, achievable, realistic and timely, as seen in Figure 6.7. Goals can also be further defined as financial or non-financial. A financial goal is a quantitative measure expressed in monetary value. These financial goals can also be divided into **short-term** and **long-term financial goals**. For example, a business may choose to decrease production costs, increase its profits or decrease its debts to improve its short- or long-term financial position. A non-financial goal is a quantitative measure that cannot be expressed in monetary value. Examples of non-financial goals include improving **customer satisfaction** and **customer retention**, increasing its **reputation** and **market share**, and establishing **corporate social responsibility** goals.

goal a purpose or aim that a person or business wants to achieve

objective an action that a business plans to do to achieve a goal within a time frame

short-term financial goal an objective which the business aims to complete within one year

long-term financial goal an objective which the business believes will take longer than one year to complete

customer satisfaction a measure of how happy customers feel when they do business with a company

customer retention the ability of a business to keep customers for a period of time

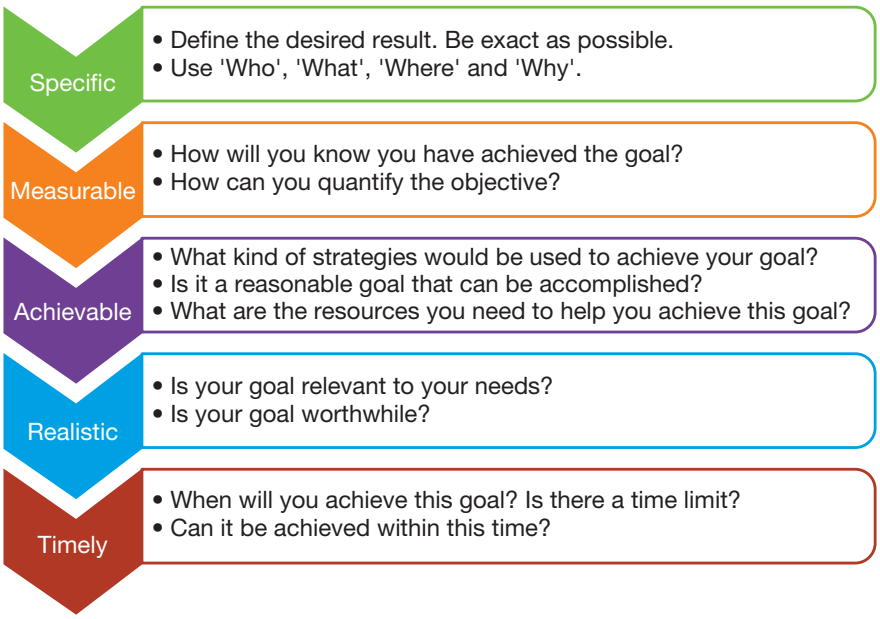
reputation the opinion that customers in general have about a business based on their past dealings with the company and the quality of the product and/or service the business sells

market share the number of products or services that a company sells compared to the number of the same product or service sold by other companies

corporate social responsibility business practices that are ethical and socially responsible

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▲ **Figure 6.7** SMART goals

Reputation and corporate social responsibility

A 2018 YouGov Omnibus research paper found that 87 per cent of Australians think that Australian businesses have a responsibility to do 'social good' as a means of enhancing their reputation and many businesses include this area when considering goals. Social good is defined as behaviour that has a positive impact on individuals or society as a whole. In business, we call this corporate social responsibility (CSR). CSR practices include ethical and social responsibility strategies. Ethical considerations can include respectful relationships in workplaces, compliance and governance issues. Social responsibility considerations can include charitable contributions from businesses, corporate sponsorship and environmental considerations.

A sustainability report is often used to provide information about the financial, environmental and social performance of large businesses. The Commonwealth Bank of Australia, for instance, produces an annual corporate responsibility report for its stakeholders. The report covers a range of practices, including teaching children the value of money, mirroring diversity and lending responsibly.

Small businesses could evaluate their corporate social responsibility with these questions:

- Is the business responsive to the social and ethical issues raised by its stakeholders and the public?
- Are the production processes environmentally friendly? What steps can the business take to reduce its carbon footprint and energy use?
- Do the business's practices comply with current legislation?
- Are its employees being trained to use its equipment?

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CASE STUDY 6.3

Yakult Australia

Yakult Australia is an example of a business that has strong ethical and corporate social responsibility practices. Yakult is a milk-based fermented drink that contains the probiotic bacteria *Lactobacillus casei Shirota*. Its Australian purpose-built factory is located in Dandenong, Victoria. The factory incorporates state-of-the-art manufacturing processes and equipment and has an on-site, quality-control laboratory. It produces between 300 000 and 450 000 bottles of Yakult daily for the Australian and New Zealand markets.



▲ **Figure 6.8** Yakult Australia produces its original Yakult and Yakult Light at its Dandenong factory in Victoria.

While Yakult prides itself on its quality management system, its corporate social responsibilities are of note too.

Some of its corporate social responsibilities include:

- Regular hearing checks for its production workers who work in the manufacturing process
- Regular training for staff to ensure safe operation of machinery
- Free educational tours of the Yakult factory to educate primary, secondary and tertiary students on the manufacturing process of Yakult
- Recycled faulty bottles are crushed and mixed with resin, and converted into plastic chairs and tables
- Effective waste management strategies to ensure that 99.5 per cent of Yakult's raw materials (known as inputs) end up in the bottle, with no by-products
- Energy management strategies through the use of off-peak rates for utilities where possible. It also does not use chlorofluorocarbons in refrigeration.

ACTIVITY 6.5
MAKING THINKING VISIBLE

Question starters

After reading Case study 6.3, **consider** the following question starters.

- Why does Yakult operate in this way?
- How would Australia look if all businesses used these ideas?
- What reasons do you think Yakult has for operating its business in this way?
- Suppose that Yakult changed its business model to have fewer CSR considerations. What would happen?
- If a person 100 years from the past read this case study on Yakult, what would they think?
- What do you think is the purpose of Yakult's business model?
- What would change if all Australian businesses had to operate similar to Yakult?

Compare your thinking and answers around these question starters with some of your peers.

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Starting a business

Starting a business or purchasing an existing business requires thorough planning. More than 90 per cent of new businesses fail within the first year of starting; careful planning before the launch can help to manage the risks in the short term.

A business plan is a useful tool that is used by individuals as they make decisions on the allocation of resources in their business along with pricing models. It is a planning document that links the ideas of a business owner with the marketing and operational aspects of the business. There are many ways of writing a business plan. However, a typical business plan usually contains at least four elements: an executive summary, an operations plan, a financial plan and a marketing plan. Writing a good business plan helps an entrepreneur create a successful business.

EXECUTIVE SUMMARY

An executive summary gives an overview of the information contained in the business plan.

OPERATIONS PLAN

mission statement a short written description of the aims of a business, charity, government department, or public organisation

The operations plan outlines the company's **mission statement**, goals and objectives. Many businesses now list corporate social responsibility as an objective due to a growing number of customers globally who are willing to pay more for a product if the business demonstrates social responsibility.

The operations plan also details the steps that will be taken to achieve the goals and objectives. It should include:

- The organisational structure of the company and staff requirements
- The facilities and equipment required
- Legal issues such as permits, insurance coverage and occupational health and safety (OHS) requirements
- Major suppliers who will provide the necessary goods for the business.

FINANCIAL PLAN

The financial plan is a critical component of a business plan. It is a statement of the financial position of the business. It contains:

- The sales forecast of the business and the expense outlay
- Break-even analysis (i.e. a financial calculation to determine the amount of goods and/or services that need to be sold to recover costs)
- The cash flow projection (i.e. the estimate of the money you expect to earn from your business and the estimate of the money you expect to spend on your business), usually over a 12-month period.

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MARKETING PLAN

The marketing plan covers the four Ps of marketing – price, placement, product and promotion. It is referred to as the **marketing mix**.

- **Product** refers to the good or service being sold by a business.
- **Price** refers to the price of the good or service. The price is often determined by the demand for the good, how exclusive it is and the length of time it has been on the market.
- **Place** refers to where the good or service is sold and how it is delivered to customers. It can be a physical storefront, a website or both.
- **Promotion** refers to the promotional strategy for the good or service. A business may like to use advertisements in print, radio or internet to promote its goods and services. Social media, for instance, is a new dynamic and affordable way of reaching potential customers; it includes platforms such as Facebook and Instagram.

marketing mix the combination of actions a company uses when selling a product or service; often described as the four Ps (product, price, place and promotion)

There is also a growing trend of businesses that also publish **sustainability reports**, which outline the economic, environmental and social impacts caused by businesses' everyday activities.

sustainability report a report on the financial, environmental and social performance of large businesses

Financial objectives and budgeting

Have you heard the phrase 'failure to plan means planning to fail'? An essential part of planning for the future for both businesses and consumers (individuals) is creating financial objectives and goals. Individuals and businesses are alike in that they both need to manage their finances in the short term and plan financially for the future. They must set a range of financial goals and objectives to manage money effectively to ensure that they meet their needs and wants.

Objectives

An objective is a result that a business aims to achieve within a time frame. The objectives of individuals may vary from person to person, depending on their access to money and products. Often their intentions may be to have enough money to make a future purchase or have enough money to fund their retirement. **Financial objectives** for businesses generally fall into one of these five categories:

- profitability
- liquidity
- solvency
- growth
- efficiency.

financial objectives a financial result an individual or a business plans to achieve within a time frame

MANAGING FINANCES

As you now know, individuals and businesses have a broad range of financial objectives and SMART goals. What is common to both

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individuals and businesses are the strategies each uses to manage their finances to meet these goals. They are very similar no matter what the environment. The strategies individuals and businesses use to manage finances and meet financial goals are:

- increase savings
- find opportunities to reduce spending
- create budgets
- check statements.

INCREASE SAVINGS

savings the remainder of your income once expenses have been subtracted

All financial goals require money! Unless you receive one huge lump sum, it is highly likely that you will need to save for a financial goal over a period of time. **Savings** are what is left over after you subtract your expenses from your income. It is the same for businesses – most financial goals (for example, buying new equipment or expanding the company) need to be saved for by setting aside small amounts at a set time each week, fortnight or month.

Money that you are setting aside or saving explicitly for a future goal is usually placed in a designated savings account so that it is separate from your regular transaction account. Most banks offer a higher interest rate for these savings accounts to encourage you to increase your savings and make larger deposits. You can set up a bank account that does not allow you to withdraw savings easily – it might take a day or two to get access to your savings, which gives you time to re-evaluate if a purchase is a need or a want. Some apps round up each purchase that you make to the nearest dollar and deposit this money into a separate savings account for you or invest it on your behalf. Using a rounding app can also be an effective way of saving small amounts of money in the short term, leading to long-term savings.



▲ **Figure 6.9** Start saving! It is wise to start saving money for your goals from as young an age as possible.

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Find opportunities to reduce spending

An easy way to keep focused on finances for both individuals and businesses is to identify opportunities to reduce spending.

ONLY PURCHASE NECESSARY ITEMS

One way to reduce spending is to not purchase unnecessary items. Often when presented with the opportunity to buy something, you will make a purchase without stopping to think if the item is needed. When this happens, you might purchase something before checking what you already have available – this leads to double-ups or having items that remain unused or unopened. If you are buying only the necessary items, you will naturally save money.

BORROW, RENT, OR BUY SECOND-HAND

Another way to reduce spending is to evaluate if you actually need to own the item, or if you could borrow or rent the item for a short period instead. By doing this, you are making use of the circular economy. The **circular economy** aims to reduce waste and share resources between consumers. As you have explored previously, the Earth has finite resources, which without recycling are becoming even more scarce. By borrowing, renting or even purchasing a second-hand item, you are not only reducing the use of resources, but you are also saving money as often renting, borrowing or buying a second-hand item are cheaper options than buying a new item. For example, for businesses, renting a piece of equipment instead of purchasing a new one can reduce spending.

circular economy an economic system aimed at eliminating waste and the continual use of resources

SHOP AROUND

Once a decision is made to buy an item, and you have determined that the purchase is necessary and that a brand-new item is essential, a straightforward way to reduce spending is to compare prices between sellers. Often, products retail in more than one location, so both consumers and businesses should complete some research and purchase the item for the lowest price.

Interesting fact

Brisbane has a tool library! In 2017, the Brisbane Tool Library became Queensland's first library of objects. The tool library allows people to borrow hand tools and power tools, and other equipment, such as camping and sports gear. Based on a circular economy, the Brisbane Tool Library is building a more sustainable society by reducing consumption and preventing waste going to landfill.

▲ **Video 6.2** Brisbane Tool Library

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Create budgets

budget a financial plan listing expected expenses and income during a particular period

Another common way to manage finances is to create a budget. A **budget** is a tool that helps you plan by recording your income and your expected expenses over a period. Although budgets are usually presented in a spreadsheet or in accounting software, some individuals write their budgets on a piece of paper at home. Most businesses also use budgeting to help with financial planning – although their income and expenses will often be on a much larger scale than those of an individual.

Despite this, the process is the same. A budget allows you to see in one place all your expected spending, and also reveal if you will have any money left over after meeting your expenses for your wants. Anything remaining is then savings.



▲**Video 6.3** Average Amanda – Anti-Poverty Week 2015

ACTIVITY 6.6
MAKING THINKING VISIBLE

Sentence, phrase, word

Use the QR code to watch Video 6.3, which was made by the Salvation Army. As you watch the video, **select** the:

1. Sentence that identifies to you why managing finances and budgeting is important.
2. Phrase that engaged or interested you regarding managing finances and budgeting.
3. Word that you found important to how you think about managing finances and budgeting.

DEVELOPING YOUR UNDERSTANDING 6.2

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1. **Explain** the difference between a short-term and long-term financial goal.
2. **Identify** and **explain** one example of the four ways which individuals and businesses manage finances.
3. **Explain** the difference between a business goal and an objective.

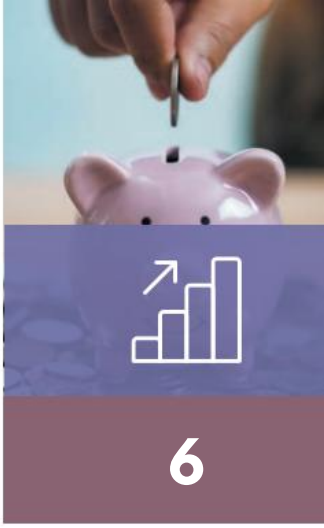
Interpret

4. **Explain** the purpose of the marketing mix using a real-life example of one of the four Ps using research.

Argue

5. **Consider** the examples of non-financial goals which business can set. **Use** research from recent news articles to explore real-life examples of one or more of these goals and **investigate** why the business might have set this goal.

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6

6.3 Market influence on resource allocation

FOCUS QUESTION

How does the increasing movement to a global market, alongside fast-paced changes in technology, influence resource allocation and the production and pricing of goods and services?

Globalisation

In its simplest form, **globalisation** is the increasing interconnection producers and consumers have to **resources**, goods and services around the world. At the heart of economics and business is decision-making between alternative use of resources. Decision-making by consumers and producers can influence the allocation of resources due to needs, wants, various innovations and the profit motive for businesses to maintain a competitive advantage over other businesses, including the use of an international focus rather than a single nation's market.

Today, one of the key ways that companies have sought to innovate and maximise resources is the change from conducting business within a single country to one that operates in multiple countries, creating a global marketplace. Such large companies are no longer considered national firms. They are known as **multinational corporations** and many of them have **subsidiary** firms in other countries. Globalisation has been encouraged by a number of factors, including improved technology and free trade agreements.

globalisation the increase and simplification of trade around the world, especially by large companies producing and trading goods in many different countries

resources describe the goods and services that a company uses to maintain their operations

multinational corporations companies that are located in several different countries, or businesses producing and selling goods in several different countries

subsidiary a company that is owned by a larger company

Technology

Technology has grown to enable the extension of traditional workspaces. The use of the internet allows workers to connect with colleagues in different countries, often working in different time zones. The telephone, video conferencing, email and instant messaging are different ways we communicate with our counterparts in offices worldwide. This enables the quick and efficient exchange of information between global co-workers and their customers, and for organisations to maximise the use of human resources through technology innovations.

The growth of technology also means that the younger generation of tomorrow will likely not have a job or career for life. In addition to people having at least seven jobs by the age of 70, other changes are anticipated.

- Permanent full-time jobs would be replaced by part-time, casual jobs and temporary work. Greater flexibility of working hours and conditions are needed to accommodate the needs of all staff.

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- Workers will be required to retrain in order to keep up with the changing nature of the workforce as jobs are redesigned to keep pace with new technology.
- The number of people who work from home will continue to increase as businesses modernise their workplaces, placing value on the increased rates of productivity and job satisfaction, which has resulted in lower absenteeism and turnover rates.



▲ **Figure 6.10** Developments in modern technology, such as video conferencing and instant messaging, have helped overcome barriers to working with people or companies who are in another city or country.

Many Australians working in multinational companies have colleagues in different countries. To allow for a seamless transition, global companies worldwide have adopted the 'follow the Sun' workflow model. It uses the analogy that as the Sun does not set, issues and problems can be passed on from one office to another office in a different time zone through the use of technology. This increases the responsiveness of the company. Therefore, companies are able to provide round-the-clock customer service.

Interesting fact

The Australian Bureau of Statistics' Census data from 2016 showed that 9.2 million Australians typically commute to work each day. COVID-19, however, created the largest working-from-home experiment Australia had ever seen. If Australians worked from home for just one day per week, it would reduce the number of commuters on the roads and transport each day by 1.8 million.

Free trade agreements

Free trade agreements (FTAs) between countries have enabled goods and services to be traded with more ease. Australia has FTAs with countries such as New Zealand, Singapore, China and many others.

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They are designed to benefit Australian importers, exporters, producers and investors by reducing or eliminating international trade and investment barriers.

The Australian Government Department of Agriculture states:

> FTAs promote stronger trade and commercial ties between participating countries, and open up opportunities for Australian exporters and investors to expand their business into key markets. They are particularly beneficial when they seek to remove barriers in highly protected markets or gain a foothold in potential or expanding markets.
>
> By facilitating access to these markets, FTAs provide significant commercial benefits to Australia's exporters and in turn, wider economic benefits to all Australians.

Source: Australian Government, Department of Agriculture, Fisheries and Forestry website: Biosecurity and trade / Trade and market access / Free trade agreements (FTAs)



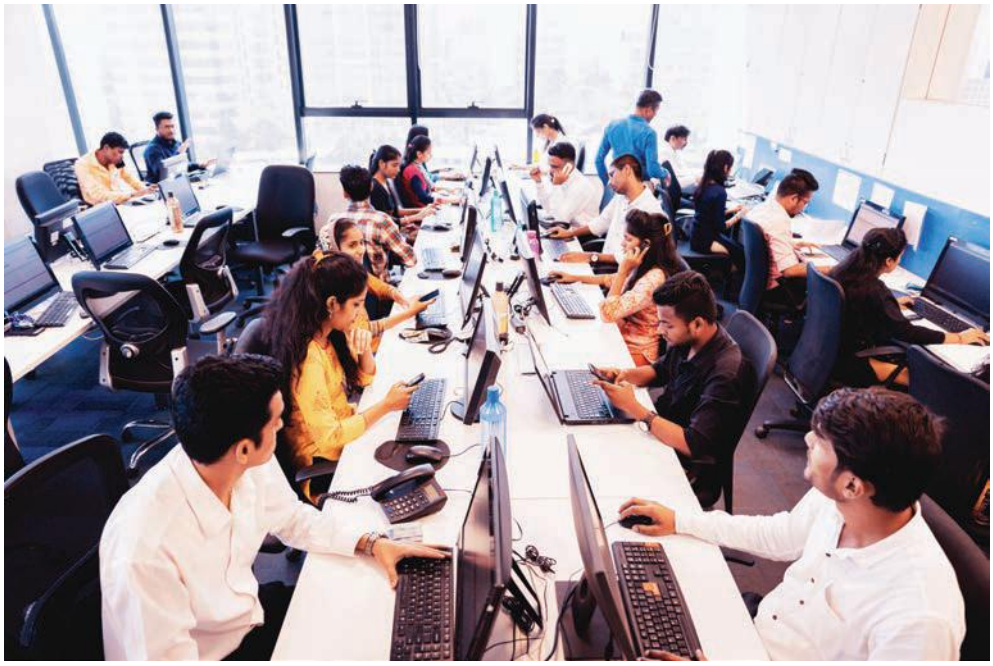
▲ **Figure 6.11** The Association of Southeast Asian Nations (ASEAN)–Australia–New Zealand Free Trade Agreement includes 12 countries, as shown on the map. Please note that ASEAN members are represented by blue, ASEAN Plus Three members are represented by purple, and ASEAN Plus Six members are represented by teal.

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tariff a tax on goods coming into a country (imports)

One example of an FTA in force is the Association of Southeast Asian Nations (ASEAN)–Australia–New Zealand Free Trade Agreement (AANZFTA), which became effective on 1 January 2010. Its benefits are:

- **Tariff** reductions
- New opportunities for Australian exporters to tap into supply chains in the region
- Legal protection for Australian investors in the region
- Ongoing economic engagement with ASEAN.



▲ **Figure 6.12** Just one of the many call centres based in India.

Effects of globalisation

OUTSOURCING

Companies can outsource their labour overseas due to the lower cost of labour in developing countries. Telstra, for example, was one of the first telecommunications companies to outsource their call centres overseas to India and Indonesia. This saved the company costs due to the lower wage levels and overall costs. However, the types of jobs being outsourced are no longer limited to customer-service call-centre jobs. In January 2019, the telecommunications carrier announced that it would outsource 1500 emerging technology roles to India. In Bangalore, a new Telstra innovation and capability centre was being built to help the business hire quickly and then train new workers across its business. The Australian skilled labour market was considered too small to meet Telstra's specific needs.

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ACTIVITY 6.7
MAKING THINKING VISIBLE

Claim, support, question

Compare the information in Figure 6.10 and Figure 6.12 and **consider** the questions below.

1. Make a claim as to why the two pictures of how people are working are so different.
2. **Justify** your claim using things that you see in the pictures or might know from your own knowledge.
3. **Propose** two to three questions that you have about the effects of globalisation after comparing the two pictures.

Compare your thinking with some of your peers.

COMPETITION

Increased competition requires companies to source their raw material for the production process from countries where it is more cheaply available. Finding a competitive advantage allows a manufacturer to remain in the market. The resulting lower costs and cheaper product prices create more profit that can be channelled into innovation.

Marketing strategies involving the marketing mix are critical to ensure products and services are priced competitively. If a product is priced too high, customers will easily be turned to a direct competitor who offers the same type of product with a cheaper price tag. However, cheaper prices may not always be attractive to a consumer if the after-sale service is poor. Therefore, while the price of a product remains critical, Australian businesses must build on customer satisfaction to increase customer retention rates in order to secure ongoing, future sales from existing customers. Innovation is one way forward for Australian businesses to remain competitive in a global market.

LABOUR EXPLOITATION

A United Nations Children's Fund 2017 paper 'How sensitive are estimates of child labour to definitions?' found that in the poorest of countries, around one in four children between the ages of five and 17 years are engaged in child labour. The International Labour Organisation estimates that 170 million children are engaged in child labour. Child labour is defined by the United Nations as 'work for which the child is either too young – work done below the required minimum age – or work which, because of its detrimental nature or conditions, is altogether considered unacceptable for children and is prohibited'.

The rise of sweatshops in developing countries has been a significant contributing factor to the issue of child labour. Many children work to

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support their families and siblings. As children leave their homes for work in neighbouring towns and cities, it displaces them from their homes, with many living in shelters and on the streets. Many children work in factories in difficult and unsafe conditions.

A 2013 report conducted by the Australian Council of Superannuation Investors studied the sourcing patterns of 34 Australian companies. It found that more companies were using lower skilled and lower paid workers in developing Asian countries. Of concern was the fact that only one-third of the companies had child and forced labour policies. An investigative report in 2013 produced by *Four Corners*, an investigative TV program on the ABC, also revealed that big Australian brands such as Rivers, Coles, Target and Kmart ordered clothes from factories in Bangladesh that did not meet international standards in working conditions. This came after the tragic collapse of Rana Plaza in Bangladesh in April 2013. Thousands of workers were forced to enter the building to begin their shifts despite cracks appearing on its facade a day before. More than 1100 garment workers lost their lives in what has been called one of the world's worst industrial disasters.



▲ **Figure 6.13** On 24 April 2013, the eight-storey Rana Plaza in Dhaka, Bangladesh, collapsed. The death toll was 1134 people.

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ACTIVITY 6.8
MAKING THINKING VISIBLE

See, think, wonder

Examine the image in Figure 6.13. **Consider** the following questions.

1 What do you see?
2 What does the picture make you think about how our goods and services are produced?
3 What does it make you wonder about how our goods and services should be produced?

DEVELOPING YOUR UNDERSTANDING 6.3

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** how markets can influence resource allocation.
2 **Explain** one of the effects of globalisation in your own words.

Interpret

3 **Determine** how technology has or can change the way we work. **Identify** two examples in your answer.
4 **Explain** the strengths and weaknesses of outsourcing.

Argue

5 Re-read the section on competition. Use research to **explore** real-life examples of where a common Australian product is made and **investigate** why the company might have chosen to make those products in that country. For example, you might investigate the price of manufacturing in that country.

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6

6.4 Decision-making and taxation

FOCUS QUESTIONS

- What are Australia's main systems of taxation?
- How does taxation affect decision-making by individuals?

Taxation

Australia uses two broad systems of taxation, **direct** and **indirect taxation**. In this section we will look at income tax, an example of direct taxation, which is collected by the government from your **salary** or **wage** and spent to support a good or service that assists a wider group of people. For example, income tax can be used to build hospitals or roads.

Income tax is a system which is based on your **personal income**. The higher each person's individual income, the higher level of tax they should pay to the government. This system of increasing tax on an individual for every dollar more that person earns is called a **progressive taxation system** and can used to re-distribute money from the higher to lower income earners and can make each individual's contributions to society fairer. The Australian Taxation Office (ATO) bases the level of taxes on **tax brackets**. The tax brackets from the ATO for the 2022–2023 financial year are displayed in Figure 6.14.

direct taxation a tax that is paid by the person or business to the Australian Taxation Office (ATO)

indirect taxation tax that can be passed on to others by the person or firm on whom it is levied, for example, goods and services tax (GST)

salary paid on an annual basis in regular amounts (e.g. fortnightly or monthly) and is unrelated to the amount of hours worked or age of the worker

wage usually paid at an hourly rate and determined by the age of the person working

personal income refers to funds that are earned by an individual and are received by them in the form of salary, wages or shares of a profit a business makes or return on investment

progressive taxation a system in which the percentage of tax paid increases as individuals' income level increase

tax brackets categories which link a range of personal income to the level of income tax each person has to pay to the government.

Resident tax rates 2022–23

Taxable income	Tax on this income
0 – $18 200	Nil
$18 201 – $45 000	19 cents for each $1 over $18 200
$45 001 – $120 000	$5 092 plus 32.5 cents for each $1 over $45 000
$120 001 – $180 000	$29 467 plus 37 cents for each $1 over $120 000
$180 001 and over	$51 667 plus 45 cents for each $1 over $180 000

▲ **Figure 6.14** The Australian Taxation Office's income tax brackets for 2022–2023

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How does income tax get calculated?

Income tax is calculated using the information in the right-hand column of the tax rates (Figure 6.14). An example is shown for you below:

Example:

Amy earns $45 000 per year (**gross income**).

She falls within the $18 201–$45 000 category.

Amy's tax = 19 cents for every 1 dollar over 18 200.

We begin by subtracting her income of $45 000 from the tax bracket below her own:

- $45 000 – $18 201 = $26 799

$26 799 is the amount that Amy will be taxed on, as it is how much more she earns than the tax bracket below her own.

The tax on this amount is '19 cents for each $1 over $18 200', which means we can multiply 0.19 (19 cents divided by 100) by her taxable amount:

- 0.19 (19 cents) x 26 799 = $5091.81

This means that Amy's **net income** is $45 000 – $5091.81 = $39 908.19

gross income refers to the total income before tax deductions are included

net income refers to the income you receive after tax has been paid to the government

ACTIVITY 6.9
MAKING THINKING VISIBLE

Claim, support, question

Now that you have explored the idea of the progressive income tax, we are going to use the steps below as a method of clarifying your thinking on this topic.

1. You should make a claim regarding the topic of taxation and the impact of taxation on the needs and wants of Australian society.
2. You should support your claim. What evidence supports your claim?
3. What questions do you have about how taxation impacts individuals and business?

Finish the activity off by sharing your thinking.

DECISION-MAKING

Each individual will respond to taxation differently; many people are happy to pay a 'fair share' but the level and future increases/decreases of taxation could impact decision-making in our society. Use the information in Case study 6.4 to examine how taxation might alter your own decision-making.

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CASE STUDY 6.4

'Money is the main motivator for working teens'

The following is a media release from the Australian Institute of Family Studies issued 29 August 2017 based on the Australian Longitudinal Study of Australian Children 2016 Annual Statistical Report *Teen Employment Experiences*.

The Institute's Director, Anne Hollonds said 16 per cent of Australian 12–13 year olds were working, rising to 39 per cent of 14–15 year olds. 'Financial factors were the main reason teens gave for their employment. This was less about saving up for something or helping with family expenses and more about earning every-day spending money,' Ms Hollonds said. 'Data from the ABS shows that girls' jobs were likely to include work as baby-sitters, sales assistants, checkout operators and waiters while boys tended to work as labourers, sales assistants, kitchen hands and fast food cooks.'

Younger teens at 12–13 earned an average of $31 a week for around 3 hours work per week, while older teens at 14–15 earned $77 a week for about 6 hours work per week. The study – involving about 3500 teens from the Longitudinal Study of Australian Children – examined which teens are working, when and how often they worked.

At 12–13 years, similar proportions of boys and girls were working, but at 14–15 years, girls were more likely to be working than boys. By 14–15, girls were more likely to be working for an employer (31 per cent) than boys (24 per cent), with another 11–12 per cent of boys and girls at this age working informally, including helping out in a family business, coaching a sports team or babysitting.

At 12–13 years, boys and girls were a little more likely to be working in informal jobs (9–10 per cent) rather than working for an employer (7–8 per cent).

AIFS' Senior Research Fellow, Dr Jennifer Baxter said teens in outer regional or remote parts of Australia were more likely to be employed than those in city areas. 'Overall, girls were more likely to be employed than boys at age 14–15, but in outer regional areas it was the boys who were more likely to be employed, particularly in informal work. This may be explained by these areas having increased opportunities for boys to work in areas like farming, labouring or contributing to a family business,' she said.

'Overall, teens who were not employed at 14–15 years had relatively weak social and emotional skills and also in the years before,' she said. 'This suggests that teens who are less confident socially may be less motivated to take up employment at this stage and simply decide to put it off for a while. For girls, those doing informal work had the most positive social emotional skills, while for boys it was those working for an employer who had the most positive social emotional skills.'

Source: Jennifer Baxter and Diana Warren, 'Money, the main motivator for working teens', Australian Government, Australian Institute of Family Studies, August 2017



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▲ **Figure 6.15** Casual work at fast-food restaurants remains a popular first job for many Australian teenagers.



▲ **Figure 6.16** Earning money to spend is one of several reasons why people might work.

ACTIVITY 6.10
MAKING THINKING VISIBLE

Think, puzzle, explore

'Money is the main motivator for working teens' is a complex case study. After you have read the paragraphs, **consider** the questions below.

1 How do you think increased knowledge of income tax would impact the motivation and decisions of teens to work and earn money?
2 What questions do you have about how income tax would change the motivation and decisions of teens to work and earn money?
3 How does your knowledge of income tax change your own motivations to work and earn money?

DEVELOPING YOUR UNDERSTANDING 6.4

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** the difference between gross income and net income.
2 **Explain** the difference between a salary and a wage.

Interpret

3 **Explain** why Australia might use a progressive income tax system.
4 **Explain** how an increase in income tax levels might influence decision-making for individuals.

Argue

5 **Consider** Figure 6.14: The Australian Taxation Office's income tax brackets for 2022–2023 and **explain** how you could adjust the brackets for income levels in order to assist those at the lower income levels. **Explain** the strengths and weaknesses of this action.

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End-of-chapter assessment

Research task

Write a business plan

Choose one of the businesses examined in this chapter (e.g. the Straits Experience or BSKT) and consider how that business could expand with an innovative new idea. Brainstorm some ideas and **select** a new good or service which builds upon the experiences of these businesses.

- **Create** a business plan, using the four elements – an executive summary, an operations plan, a financial plan and a marketing plan. As part of your operations plan, **determine** how you may include corporate social responsibility.
- **Create** a marketing plan which you could use to promote the new good or service.



▲ **Figure 6.17** Business plans are essential for whatever business you are interested in being involved in. The more you plan, the more prepared you will be and you can shape your approach to have the greatest chance of success.

Digital resources

Visit the Interactive Textbook or Online Teaching Suite to access:

- General Capability Project
- Interactive chapter Quiz
- Interactive Scorcher Quiz
- Videos, image galleries and other extra materials.

SCORCHER

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PART

4

Civics and Citizenship

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What is Civics and Citizenship?

Civics and Citizenship is a strand of the Humanities and Social Sciences curriculum which aims to equip students with a lifelong interest in engaging with Australian civic life. It promotes an appreciation and understanding of the values, principles, institutions and practices which characterise Australia's political and legal systems. Fundamentally, it prepares students for living in a dynamic society and provokes them to question, understand and contribute to the world in which they live – at a local, national or global level.

Despite Australia's Christian heritage, the country has evolved to become a multicultural and multi-faith society. The curriculum acknowledges the experiences and contributions of First Nations Australians, while also exploring the diverse nature and identity of contemporary Australia.

This unit teaches students about the influence that elections, political parties, interest groups, the media and individuals have on Australia's government. It also unpacks Australia's legal system, including the types of laws in Australia and how these laws are made. In analysing how one's understanding of national identity is shaped, students will begin to explore how to become active citizens.

Learning goals

Civics and Citizenship aims to:

- develop a sense of belonging to Australia's democratic society
- encourage students to become active and informed Australian and global citizens
- foster values such as respect, civility, equity, justice and responsibility
- contribute to the growth of personal capabilities such as appreciating diverse perspectives, showing empathy, inter-cultural understanding and self-awareness, and being able to effectively collaborate and negotiate with others.

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Curriculum links

Key inquiry questions shaping the unit include:

- What is the role and impact of elections and political parties in Australian democracy?
- How can citizens shape and influence Australia's political system?
- How are laws made and applied in Australia?
- What different perspectives are there about national identity?

By the end of the unit, students will be able to:

- explain how Australians are informed about and participate in their democracy
- describe the roles of political parties and elected representatives in Australian government
- explain the characteristics of laws, how laws are made and the types of laws in Australia
- identify ways in which Australians express different aspects of their identity
- explain perspectives on Australia's national identity

Through investigating contemporary issues, Civics and Citizenship also aims to develop students' skills in areas such as:

- questioning and research
- analysis, evaluation and interpretation
- civic participation and decision-making
- communicating.

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UNIT

1

The Australian political system

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Overview

In studying Civics and Citizenship, students are provided with opportunities to investigate contemporary civic, political and legal issues and concepts. Through this, they will develop the necessary capacities and dispositions to responsibly participate in Australia's democracy, at a local, regional, state or national level.

By the end of Year 8, students can explain how Australians are informed about and participate in their democracy. They describe the roles of political parties and elected representatives in Australian government. They explain the characteristics of laws, how laws are made and the types of laws in Australia. Students identify ways in which Australians express different aspects of their identity and explain perspectives on Australia's national identity.

Learning goals

After completing this unit, you should be able to answer these questions:

- What is the role and impact of elections and political parties in Australian democracy?
- How can citizens shape and influence Australia's political system?
- How are laws made and applied in Australia?
- What different perspectives are there about national identity?

◄ **Source 7A** What do you think contributes to a sense of national identity?

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CHAPTER 7: Government and democracy

Setting the scene: digital activism is the way of the future

Today's teenagers have never known a time without the internet, and it plays an increasingly important role in the lives of these 'digital natives'.

As a result, young people are using social media platforms, such as Tiktok and Instagram, as their main source of news. And in a world where nothing is private, politicians are facing more and more pressure to carefully manage their online identity.

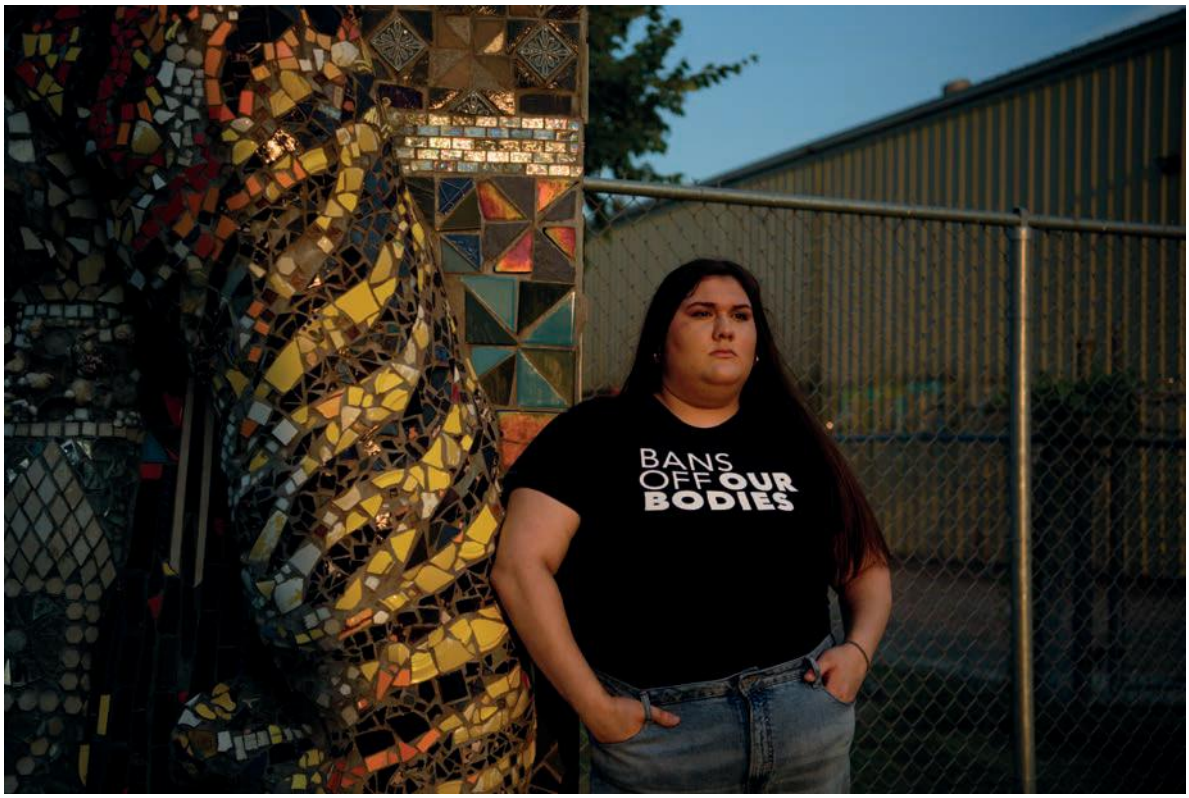
Young people are the key to the future, and politicians must learn that the internet and social media play a critical role in shaping the political attitudes, values and behaviours of the next generation of voters. The Australian Electoral Commission even got on board with its #MyFirstDemocracySausage campaign, encouraging young people to engage in politics and democracy.

So, what do young people care about and how are they using the internet to influence government decisions and actions?



▲ **Figure 7.1** Young climate activists in London throw soup on a Van Gogh painting.

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▲ **Figure 7.2** Activist Olivia Julianna uses Tiktok to engage with fellow teens on political issues, such as abortion rights.



▲ **Figure 7.3** Young people in New York use social media to support Ukrainians in the war against Russia.



▲ **Figure 7.4** Social activist, Clara Sorrenti, aka Keffals, gained a following with her political live streams on the platform, Twitch. She addresses anti-LGBTIQA+ government measures, advocates for the rights of trans people and has fought back against online harassment.

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◄ **Figure 7.5** Students in Sydney rally ahead of the 2022 Federal election. The group used YouTube, Facebook, Twitter and Instagram to advocate their #StopAdani campaign against a new, massive coal mine in Australia.



◄ **Figure 7.6** A young protester in Germany cuts off her hair to show solidarity with women in Iran after the death of Mahsa Amini, a woman who was arrested, detained and killed for not wearing her headscarf properly.

ACTIVITY 7.1
COGNITIVE SPOTLIGHT: ARGUE

Write down your answers to the questions below, and then **discuss** these with a class peer.

1 **Describe** the types of social, environmental and economic issues that are of concern to young people today.
2 **Explain** how the young people in the Figures 7.1 to 7.6 sought to influence political decisions and processes in order to address these issues of concern.
3 If you were to engage in digital activism, **identify** issues that would be of most concern to you. **Argue**, with reasons, about how you would ensure Australia's politicians addressed these issues.

Be prepared to share your responses with the class.

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Chapter overview

Introduction

In this chapter, you will learn about Australia's system of government, including what a democracy is, how elections work, and what politicians and governments do. You will learn about political parties in Australia, as well as other interest groups which play a role in shaping our democracy. You will also learn about some of the rights and responsibilities of civilians in our system of government, as well as the way that people in other nations are governed.

Learning goals

By the end of the chapter, students will be able to:

- explain how Australians are informed about and participate in their democracy
- describe the roles of political parties and elected representatives in the Australian government.



▲ **Figure 7.7** A citizen's right to vote is a key element of any democracy. An Australian Electoral Commission staff member assists a voter at a polling booth on 21 May 2022 in Brisbane, Queensland.

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7

7.1 Active and informed Australian citizens: how Australians are informed about and participate in democracy

FOCUS QUESTIONS

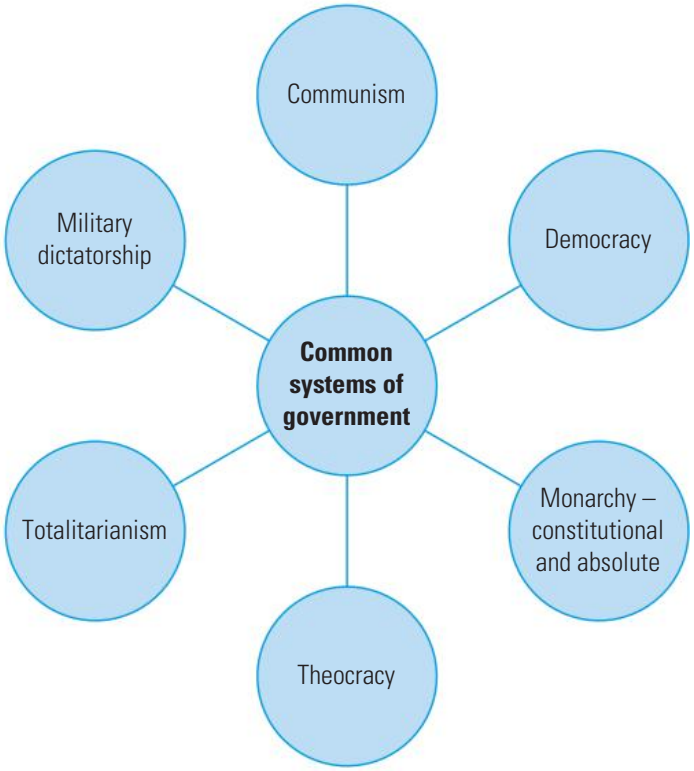
- How do Australians become informed about democracy?
- How can Australians participate in democracy?

How can citizens participate in Australia's democracy?

governance the way in which a country, entity or organisation is directed, controlled and operated, particularly in regard to structure and decision-making

system of government the way that power and governance is distributed within a country's political system

Each country around the world is controlled by people who have the power to make decisions about how the country is run. The way that this power and **governance** is distributed within a country is referred to as the country's **system of government**. Figure 7.8 represents the different systems of government globally.



▲ **Figure 7.8** Common systems of government

Democracies, like Australia, are commonly known as free and just systems of government, where citizens have a say through voting. Citizens are able to exercise various rights and freedoms to ensure they are heard and treated fairly.



THINKING DEEPER

What does a democracy look like to you?

Your answers to the Thinking Deeper question are probably quite varied, depending on your own experiences. However, most likely, you associate an understanding of democracy with certain rights and freedoms that allow you to live life in your own way, within reason.

Upholding these freedoms is essential to a strong and healthy democracy where citizens can:

- be involved in their community
- engage in decision-making
- debate and discuss issues.

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Freedoms, such as freedom of speech and assembly, enable active participation in Australia's democracy. Citizens can use these freedoms to engage in the systems that allow them to contribute to society and have a say about issues affecting them.

In this section, you will learn about the different ways these freedoms allow people to actively participate in democracy, including:

- voting in elections
- contacting elected representatives
- joining political parties
- lobby and pressure groups
- direct action.

VOTING IN ELECTIONS

At a local, state and federal level, citizens vote for people to represent them. These people become politicians, or Members of Parliament, and are representatives elected to serve a community and its peoples' best interests and needs.

From the age of 18, citizens can cast their vote to have their say on which representative's values, beliefs and ideas align with their own. Representatives are often associated with a political party, such as the Australian Labor Party or the Liberal National Party of Australia, but they don't have to be.

Registering to vote and participating in elections is one of the most important ways to participate in Australia's democracy. Because voting is compulsory, it means that all citizens have an equal opportunity to have their say on the governance of the country.



▲ **Figure 7.9** Young Melbourne residents cast their vote in the 2022 Federal election

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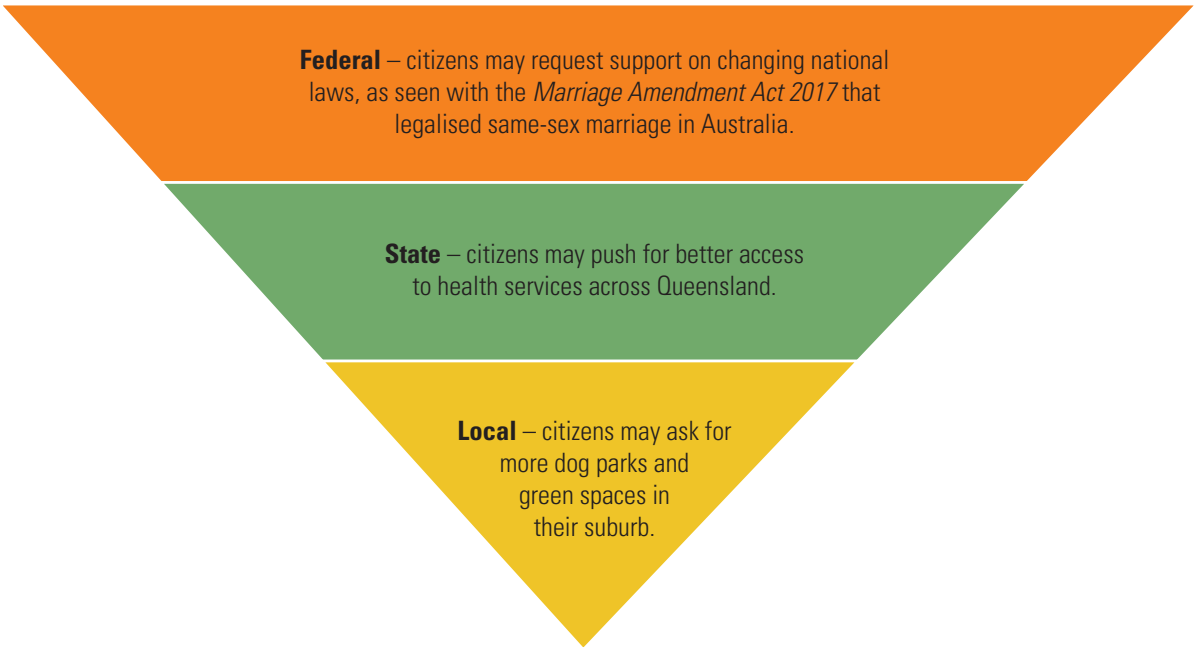
CONTACTING ELECTED REPRESENTATIVES

advocate to publicly support a specific cause or policy

Once elected, representatives can **advocate** on behalf of citizens. Each representative is responsible for the interests of people in a particular geographic region, called an electorate, and therefore must understand what these interests are. These interests may vary at different levels of government.

Citizens can contact their local, state or Federal Member of Parliament to discuss issues that concern them. They may choose to:

- visit their local office in the community
- write a letter to them
- email or call them
- reach out to them via their official social media pages.



▲ **Figure 7.10** Example areas of citizen interest that elected representatives may advocate for at each level of government

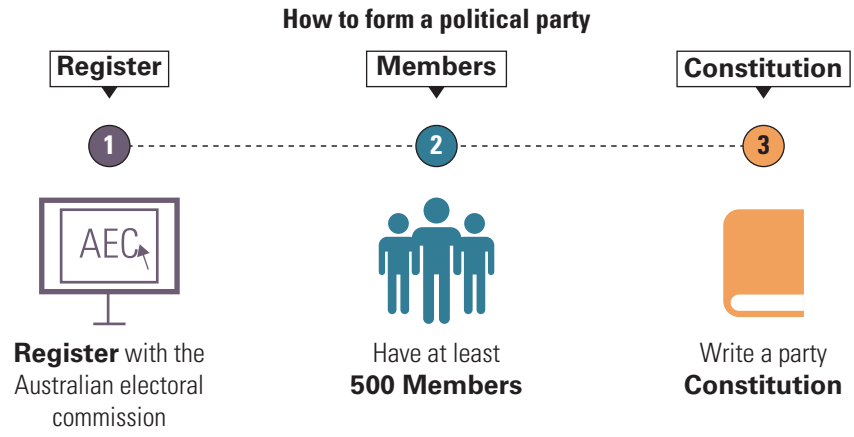
JOINING A POLITICAL PARTY

political party an organisation that represents a particular group of people or a set of attitudes, values, ideas and beliefs, and aims to have its members elected to Parliament

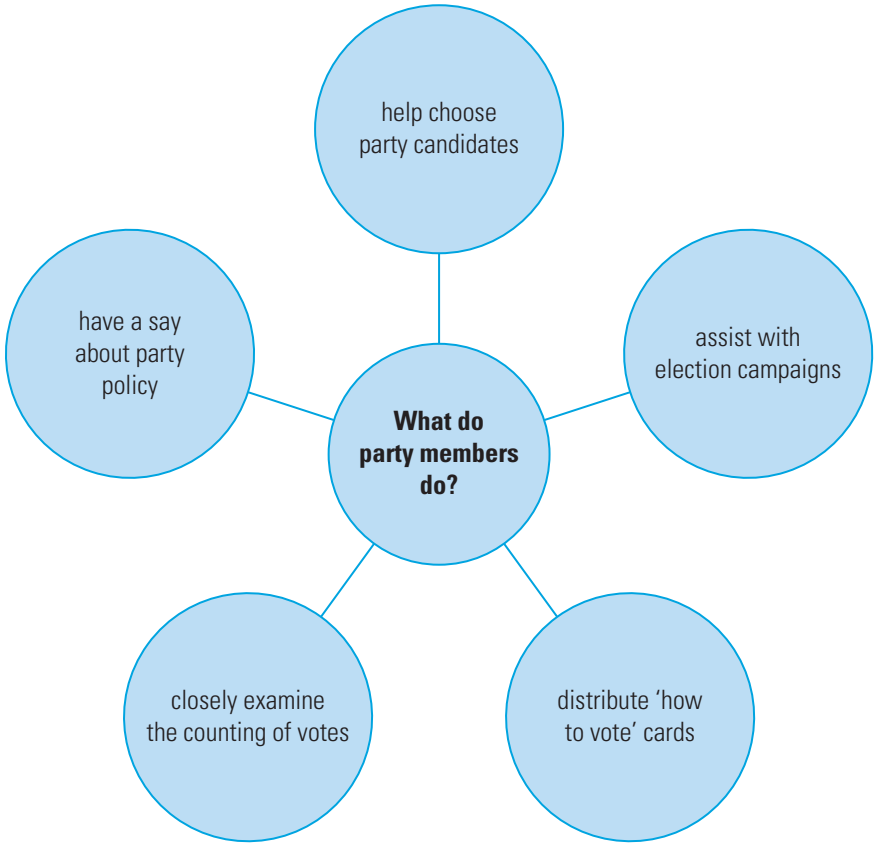
An organisation that represents a particular group of people or a set of attitudes, values, ideas and beliefs, with the aim of having members elected to Parliament, is known as a **political party**.

Sometimes, members of the community are particularly passionate about a career in politics or about the issues that a political party stands for. Joining a political party is relatively easy for Australian citizens. When you belong to a party, you can influence policy and have your say on what matters to you.

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▲ **Figure 7.11** Citizens can form their own political party.



◄ **Figure 7.12** The role of members of political parties

ACTIVITY 7.2
COGNITIVE SPOTLIGHT: DESCRIBE

Become a political party member

Investigate the process of joining one of the following political parties:

- Australian Labor Party (ALP)
- Liberal National Party (LNP)
- The Australian Greens
- Other, as approved by the teacher.

In doing so, develop open questions to guide your investigation.

Describe this process and discuss your findings with the class.

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LOBBY AND PRESSURE GROUPS

Interest groups play an important role in Australia's democracy by advocating for particular groups of people, businesses or industries, or for certain causes or beliefs. Interest groups can be classified into two types – lobby groups and pressure groups.

Lobbying is a form of advocacy whereby a team of individuals seeks to influence government decisions and policies by directly corresponding with them. The people involved in lobbying form what is known as a **lobby group**.

lobby group a group of individuals who seek to influence government decisions and policies through direct correspondence

pressure group a group of individuals who indirectly influence government actions and priorities by promoting a particular cause, agenda or ideology

On the other hand, **pressure groups** are teams of individuals who indirectly influence government actions and priorities by promoting a particular cause, agenda or ideology.

Typically, lobby groups take a more direct approach to engaging with government, employing tactics such as:

- corresponding with Members of Parliament and Ministers via letters and petitions
- meeting one-on-one with Ministers or senior public servants to discuss issues
- being employed by the government to provide direct advice on a matter of expertise.

Pressure groups are more indirect and generally act in the public way, such as through:

- protesting, rallying or marching to raise awareness
- campaigning via social media
- writing letters demanding action or voicing opinions.



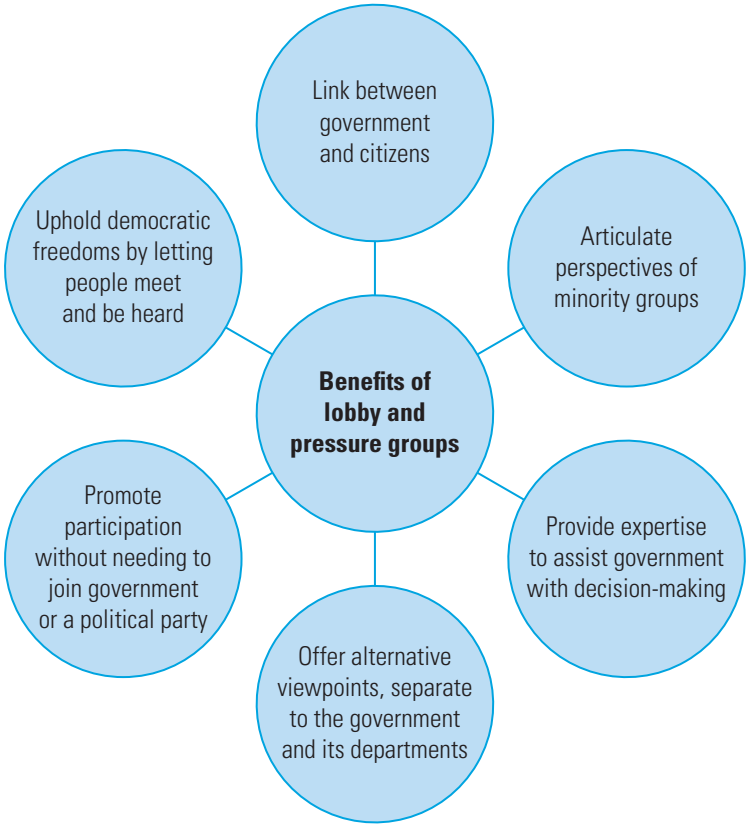
▲ **Figure 7.13** Farmers for Climate Action is a pressure group who advocate for government protection of the environment and support in managing the effects of climate change in rural communities.

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Both types of groups can:

- campaign for or against election candidates and political party agendas
- take legal action or request appeal.

Figure 7.14 outlines the benefits of lobby and pressure groups for Australia's democracy.



▲ **Figure 7.14** Benefits of lobby and pressure groups



THINKING DEEPER

What may be the limitations of allowing feedback from lobby and pressure groups to influence government decisions?



ACTIVITY 7.3
COGNITIVE SPOTLIGHT: EXPLAIN

Investigating interest groups

Select one of the interest groups listed below.

- Australian Christian Lobby
- Boot Brisbane
- GetUp!
- Kidsafe Queensland
- LGBTIQ+ Health Australia
- Queensland Conservation Council
- Queensland Farmers' Federation
- Queensland Resources Council
- Rural Australians for Refugees
- Youth Advocacy Centre.

Investigate the work of the interest group, and using a variety of sources:

1 **Describe** the purpose of the interest group.
2 **Explain** the strategies used by the interest group to advocate for this purpose.

Ensure you reference sources of information appropriately and use correct spelling, grammar, punctuation and terminology in your response.

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DIRECT ACTION

direct action when individuals directly engage with issues that they seek to change

Instead of elected representatives or interest groups advocating on people's behalf, citizens can mobilise their democratic freedoms through **direct action**.

Direct action involves people engaging with an issue themselves. There are two categories of direct action – civil resistance (lawful) and civil disobedience (unlawful).

Examples of direct action can be seen in Table 7.1.

▼ **Table 7.1** Types of direct action used to participate in Australia's democracy

Civil resistance	Civil disobedience
Lawful, nonviolent acts such as: • Peaceful protests • Marches and demonstrations • Silent vigils • Petitions • Boycotts • Picketing	Nonviolent acts that deliberately disobey the law such as: • Disrupting trade and business activity through boycott or deliberate interference with products/services • Labour resistance like strikes and walk-outs • Trespassing • Sit-ins • Blockades



ACTIVITY 7.4
COGNITIVE SPOTLIGHT: ANALYSE

Taking action

Investigate a case where citizens have taken direct action to participate in a political campaign in Australia. Answer the questions below. Some examples have been provided for you:

- Black Lives Matter
- Climate change
- COVID-19 government measures
- Women's rights.

1. **Explain** the reasons why direct action was taken in this instance.
2. **Describe** how citizens participated in the campaign.
3. **Analyse** the different perspectives on the issue the citizens were involved in and any potential challenges these differences might result in.

Communicate your findings in a digital presentation, ensuring you correctly reference all sources.

In 2019, the Queensland Government passed an anti-protest law that criminalises the use of a type of locking device that is commonly used in peaceful protests to cause interference with transport or equipment or to stop someone from entering or leaving a place of business.

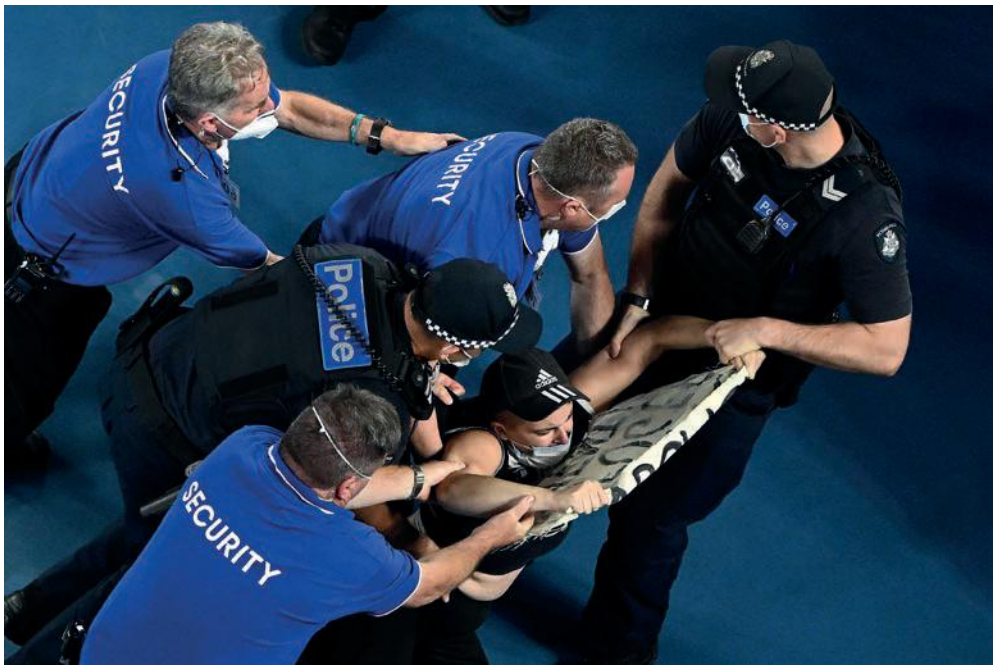
The *Summary Offences and Other Legislation Amendment Act 2019* came under fire from many Australian and international organisations, such as the United Nations, for limiting democratic freedoms.



THINKING DEEPER

Do you think that governments should be allowed to restrict citizens' rights to engage in direct action?

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▲ **Figure 7.15** A protester interrupts the 2023 Australian Open final in Melbourne to protest against refugee detention.

DEVELOPING YOUR UNDERSTANDING 7.1

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** the concept of a 'system of government'.
2 **Describe** the system of government of 'democracy'.
3 **Explain** how Australians can participate in democracy.

Interpret

4 **Interpret** Figure 7.15 to **explain** how the actions of the person in the photo were a form of direct democratic action.

Argue

5 Referring to Figure 7.15, argue whether the actions of the protestor is an example of civil resistance or civil disobedience.

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7

7.2 Voting in Australia: the role of political parties and independent representatives in Australian democracy

FOCUS QUESTIONS

- What role do political parties and independent representatives play in Australia's democracy?
- How do elections work?
- How is government formed?

referendum a specific type of vote for the purpose of amending the Australian Constitution

Australia officially became a country – rather than six separate colonies – on 1 January 1901, as a result of **referendums** conducted in each colony in the two years prior.

At this time, the voting age was 21, whereas it is now 18 years of age. This was changed in 1973.

Most men of British origin were entitled to voting rights, and in 1902 this right was extended to women. However, under legislation, other groups were excluded from voting, including Aboriginal and Torres Strait Islander peoples and people from Asia, Africa and the islands of the Pacific.

After much campaigning, in 1962 Aboriginal and Torres Strait Islander peoples gained the right to vote. However, this was not compulsory. It was not until 1984 that Aboriginal and Torres Strait Islander peoples were required to register on the electoral roll like all other citizens.



▲ **Figure 7.16** Australian Electoral Commission staff count Senate votes in Mount Isa, Queensland.

Interesting fact

Before Federation, women were not allowed to vote. However, Australia was the second country in the world to allow women the right to vote.

ACTIVITY 7.5
COGNITIVE SPOTLIGHT: CREATE

History of voting

Create a timeline which depicts how who can vote in Australian democracy has changed since Federation.

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Different voting systems

In Australia, two main types of voting systems are used – preferential voting and proportional representation. Both of these systems allow citizens to elect individual candidates for representation. This is because Australia is a **representative democracy**.

representative democracy a system of government whereby citizens choose individuals (known as representatives) to make decisions on their behalf

The table below outlines the difference between these two systems.

▼ **Table 7.2** Preferential voting vs Proportional representation

Preferential voting	Proportional representation
• An order of preference for the political candidates is identified on the voting ballot paper. • All Australian elections engage in preferential voting. • *Full preferential* – on the ballot paper, the voter must identify all candidates in order of preference. • *Partial preferential* – on the ballot paper, the voter must identify a minimum number of candidates in order of preference. • *Optional preferential* – on the ballot paper, the voter is only required to indicate their first choice of preferred candidate. Any other preferences after this are optional. • The House of Representatives uses a full preferential voting system, whereas the Senate uses a partial preferential system.	• Political parties and independent candidates are elected to Parliament in proportion to the number of votes they receive. • The Senate uses this system. • A candidate is elected to Parliament when the total number of votes is greater than or equal to the stated quota (the number of votes they need to be certain of their win). • A formula is used to calculate this quota based on data such as number of votes and number of candidates. • Depending on the level of government, voters can choose to vote 'above the line' (only a single candidate is voted for) or 'below the line' (all candidates must be numbered in preferential order) on their ballot paper. The Senate allows for this type of voting to occur.

▲ **Video 7.1**
Preferential voting

ACTIVITY 7.6
COGNITIVE SPOTLIGHT: EXPLAIN

Voting

Watch Video 7.1 and answer the following questions.

1 **Explain** how to fill out the ballot paper in an election, as per Australia's preferential voting system.
2 **Explain** the importance of this type of voting system.

The role of the Australian Electoral Commission

The Australian Electoral Commission (AEC) is the Federal agency that deals with voting processes. In Queensland, this agency is called the Electoral Commission Queensland (ECQ).

Interesting fact

Enrolling to vote is easy! Simply go to the AEC's website and complete a form, ensuring that you have certain legal documentation, such as your birth certificate, passport or drivers' licence close by to provide the necessary details.

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ACTIVITY 7.7
COGNITIVE SPOTLIGHT: DEVELOP

Why is Australia's electoral service independent?

Investigate the role of the Australian Electoral Commission (AEC).

- Develop questions that allow you to better understand the importance of the AEC and their role in Australian democracy.
- Using a variety of reliable sources, **select** and **organise** your findings from research to **analyse** why Australia's electoral service is independent. That is, not managed by the elected government.

liberal democracy a system of government which promotes the rights of individuals and groups with regard to political, legal and social representation

representatives a person who acts on behalf of citizens, as chosen by the individuals through a process of voting

electorate a geographic area whose population a member of parliament is elected to represent. An electorate is also known as a 'seat' because a Member of Parliament has a seat in the parliamentary chamber

party platform the values, beliefs and ideas that the political party supports



▲ **Figure 7.17** Australian Electoral Commission staff sort through ballot papers.

How are governments formed?

Australia's system of government is called a **liberal democracy**. In this system, citizens vote to elect leaders to run the country on their behalf. These people are called **representatives**.

Representatives work for citizens in different geographic areas, called **electorates**, and are mostly associated with a certain political party. If they are not a part of a political party, they are referred to as an independent.

Political parties are groups of people with similar values, views and beliefs who join together with the goal of forming government. A **party platform** communicates their values and policies.

THINKING DEEPER

Do you know who the major political parties are in Australia?



▲ **Figure 7.18** Australian Labor Party leader, Anthony Albanese, claims victory at the 2022 Federal election as Australia's 31st Prime Minister.

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Political parties

In Australia, there are three major political parties represented at a Federal level. These are the Australian Labor Party, the Liberal Party of Australia and the Nationals. However, more recently, candidates from minor political parties, such as the Australian Greens, have gained a greater number of votes than previously.

Let's learn more about some of these political parties.



▲ **Figure 7.19** Queensland's current Premier is Annastacia Palaszczuk, seen here claiming victory at the 2020 State election.

AUSTRALIAN LABOR PARTY (ALP)

- The ALP is the oldest political party in Australia.
- Well-known ALP Prime Ministers – Anthony Albanese (2022 – present), Julia Gillard (2010–2013), Kevin Rudd (2007–2010), Bob Hawke (1983–1991), Gough Whitlam (1972–1975)

Interesting fact

The ALP was founded before Australia's 1901 Federation, in 1890.



▲ **Figure 7.20** Former Prime Minister Scott Morrison addressing supporters following his defeat in the 2022 Federal election.

LIBERAL PARTY OF AUSTRALIA (LIBERAL)

- Since 1944
- Well-known Liberal Prime Ministers – Scott Morrison (2019–2022), Malcolm Turnbull (2015–2018), Tony Abbott (2013–2015), John Howard (1996–2007)

Interesting fact

Australia's longest-serving Prime Minister to date was Robert Menzies, who governed for a total of 18 years, 164 days from 1939–1941 and 1949–1966.

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THE NATIONALS

- Since 1920
- Originally called the Country Party
- Renamed multiple times; for example, National Country Party, National Party of Australia
- Since 1968, there have been no prime ministers from the party.
- Often, The Nationals unite with the Liberals and govern as what is called a **coalition**. In name, they are referred to simply as 'The Coalition'.
- In Queensland, both parties merged in 2008 to become the Liberal National Party (LNP).

coalition when two or more political parties unite to increase their chances at forming government



▲ **Figure 7.21** Member of Parliament, Barnaby Joyce, is a well-known member of The Nationals.

Interesting fact

Some of the shortest-serving Prime Ministers in the history of Australia were Nationals, such as Earle Page's 20-day leadership term.

AUSTRALIAN GREENS

- The party, as it's known today, was formed in 1992.
- In a world-first, the United Tasmania Group was a 'green' party who ran candidates in the 1972 Federal election.
- Throughout the 1980s, New South Wales and Western Australia saw the first official Greens-named parties.
- The party has increased its visibility and popularity among voters and now has a number of elected representatives, including the Senator for Queensland, Penny Allman-Payne and the Member of Parliament for Brisbane, Stephen Bates.



▲ **Figure 7.22** Australian Greens candidate, Stephen Bates, lands the seat of Brisbane in the 2022 Federal election, in a monumental moment for the party.

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ACTIVITY 7.8
COGNITIVE SPOTLIGHT: COMMUNICATE

Investigating party platforms

1 **Select** three of the political parties listed below. **Investigate** the Federal-level party platforms of your selected parties by accessing their respective websites.
   - **a** Australian Labor Party
   - **b** Liberal Party
   - **c** The Nationals
   - **d** Australian Greens
   - **e** Pauline Hanson's One Nation
   - **f** Katter's Australia Party
   - **g** United Australia Party
2 **Identify** the key issues each party is concerned with.
3 **Analyse** each party's party platform and current policies to **explain** the difference in their values, views and beliefs.
4 **Explain** how the parties influence citizens' understanding of issues and their political choices.
5 **Communicate** your findings in a one-page flyer that uses:
   - **a** Appropriate terminology
   - **b** A visually appealing and professional layout
   - **c** Clear and accurate communication appropriate for a student audience.

THE ROLE OF INDEPENDENTS

An **independent** is a candidate who does not affiliate with a particular political party. Like any other candidate running in an election, they represent an electorate and can be voted for in the usual process. Once elected, they can also introduce their own bills to Parliament and will engage in parliamentary debate, as well as vote on other Members' bills.

independent a political candidate who does not belong to a political party

If elected, Independents play a crucial role in the success of introducing new legislation. This is because they can make up their own mind about whether to vote for or against a proposal introduced in Parliament. When Members belong to a political party, they usually vote together to show support and to get a bill passed, but Independents do not have to do this. Sometimes, they support the government, other times they support the opposition and in less frequent occasions, they may abstain from voting altogether.



▲ **Figure 7.23** Independent candidate, Dr Sophie Scamps, at the polling booth on election day

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Understanding voters and strategies used to influence how citizens vote

election a formal process in which citizens of an electorate vote for a Member of Parliament to represent their interests, values and priorities. An election also results in a leader to represent the country or a particular state/territory

In order to develop an **election** campaign and be successful in being elected to Parliament, candidates must first have a strong sense of how citizens' understanding of issues, policies and political choices are shaped.

Figure 7.24 depicts some of the factors that influence this understanding. Can you think of any others?

People's lived experiences

- For example, COVID-19 influenced people's views on vaccination and lockdown, including the Government's response to the virus.

Past political campaigns and policies

- For example, previous Labor Party leaders have positioned themselves as more progressive, and the Liberal Party more focused on high-income earners.

People's jobs

- Political parties often support certain industries with extra funding and policies to improve these businesses and workplaces.

Demographics

- For example, a political party who focuses on childcare benefits may appeal to families.

People's values and beliefs

- For example, a political party that promotes action on climate change will appeal to voters who place a value on sustainability.

Parental/ family voting patterns

- If one's parents or family have an allegiance with a particular party, a child might be raised to uphold the same voting beliefs.

Engagement

- For example, by reading the newspaper, listening to the radio or conversing with family and friends, you can learn more about politics.

▲ **Figure 7.24** Factors influencing citizens' understanding of political issues, policies and choices.



THINKING DEEPER

What factors have influenced your and your family's or friends' understanding of politics so far?

When an election is called, political parties and independents will campaign to promote their candidates and policies. In the lead-up to the election, various strategies are used to persuade and engage voters in choosing certain representatives.

Let's explore some voter engagement strategies.

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▼ **Table 7.3** Strategies used by the candidates and their political parties

Strategy: public debate	
Description	**Example**

• Leaders' debate:
  • ALP & Liberal party leaders participate in a formal, televised debate
  • face-to-face
  • one hour
  • at least 3 debates during a campaign
  • panellists ask questions, which the leaders take turns in answering
• TV and radio programs may also invite party representatives to debate issues
	
	▲ **Figure 7.25** Anthony Albanese and Scott Morrison go head-to-head in the second Leaders' Debate in preparation for the 2022 Federal election.

Strategy: campaign trails and doorknocking	
Description	**Example**
• Representatives, along with party members, visit electorates to meet with citizens • Planned events to promote policy agendas • Door-knocking – visiting an electorate and knocking on doors of voters to talk to them	 ▲ **Figure 7.26** Queensland Premier Annastacia Palaszczuk interacts with workers on the campaign trail for the 2020 election.
Strategy: advertising	
Description	**Example**
• Feature party leaders • Messages are short, and easy to understand and remember • Create negative opinion of opposition • Types – TV, radio, newspaper, outdoor (e.g. billboards and bus stops), leaflets, online	 ▲ **Figure 7.27** Clive Palmer's United Australia Party tried to attract voters with their outdoor advertising in the 2019 Federal election.

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▼ **Table 7.3** (*Continued*)

Strategy: voting places and how-to-vote cards	
Description	**Example**
• At registered polling places (e.g. local state schools, churches, community centres) • Party members and supporters, dressed in party merchandise, hand out instructional cards for how to vote	 ▲ **Figure 7.28** Independent candidate, Zali Steggall's how-to-vote card in the 2019 Federal election demonstrates preferential voting procedures.
Strategy: social media	
Description	**Example**
• Own social media pages – whole-party or individual representatives • Facebook & Twitter are popular • Appeal to younger voters	 ▲ **Figure 7.29** Political parties use social media to appeal to younger voters

STRATEGIES USED BY THE MEDIA AND OTHER ORGANISATIONS

Strategy: traditional media	
Description	**Example**
• Major role in constructing the election narrative • TV – current affairs and news programs • Newspaper – print or online; daily opinion polls; featured articles or editorials • Radio – interviews and talk-back	 ▲ **Figure 7.30** Anthony Albanese speaks at a press conference in Canberra

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Strategy: opinion polls and political consulting firms	
Description	**Example**
• Voter surveys • Usually conducted by polling companies • Sometimes conducted by political parties themselves • Over-the-phone or online • Randomly selected • Ask for age and income level to ensure variety • Feedback on voter values and opinion on election issues and policies • Political consulting firms work with parties and candidates to develop campaign strategies and monitor public perception of this campaign	 ▲ **Figure 7.31** A Get-up volunteer campaigning against Liberal Party candidate Peter Dutton at the 2022 election.
Strategy: interest groups	
Description	**Example**

• Groups formed to promote particular causes or issues, such as:
  • Pressure groups or lobbyists
  • Unions and employer associations
	
	▲ **Figure 7.32** Protestors for climate action in the lead-up to the 2022 Federal election

ACTIVITY 7.9
COGNITIVE SPOTLIGHT: DEVISE

Running for parliament

Working in small groups, devise an election campaign for you to run as candidates for a new minor party in the next Federal election. In doing so:

1 **Explain** your party platform.
2 **Analyse** differing perspectives you may encounter on key issues within your platform.
3 **Create** election campaign strategies and material that promotes your party platform to a particular voter group.

Present your findings in a digital presentation to the class.

THINKING DEEPER

Where have you seen or heard of these voter engagement strategies being used?

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member of parliament a person who has been formally elected, by way of voting, to represent the citizens of an electorate

parliamentary majority a situation when a party or coalition has the greatest number of seats in the House of Representatives and is therefore able to form government

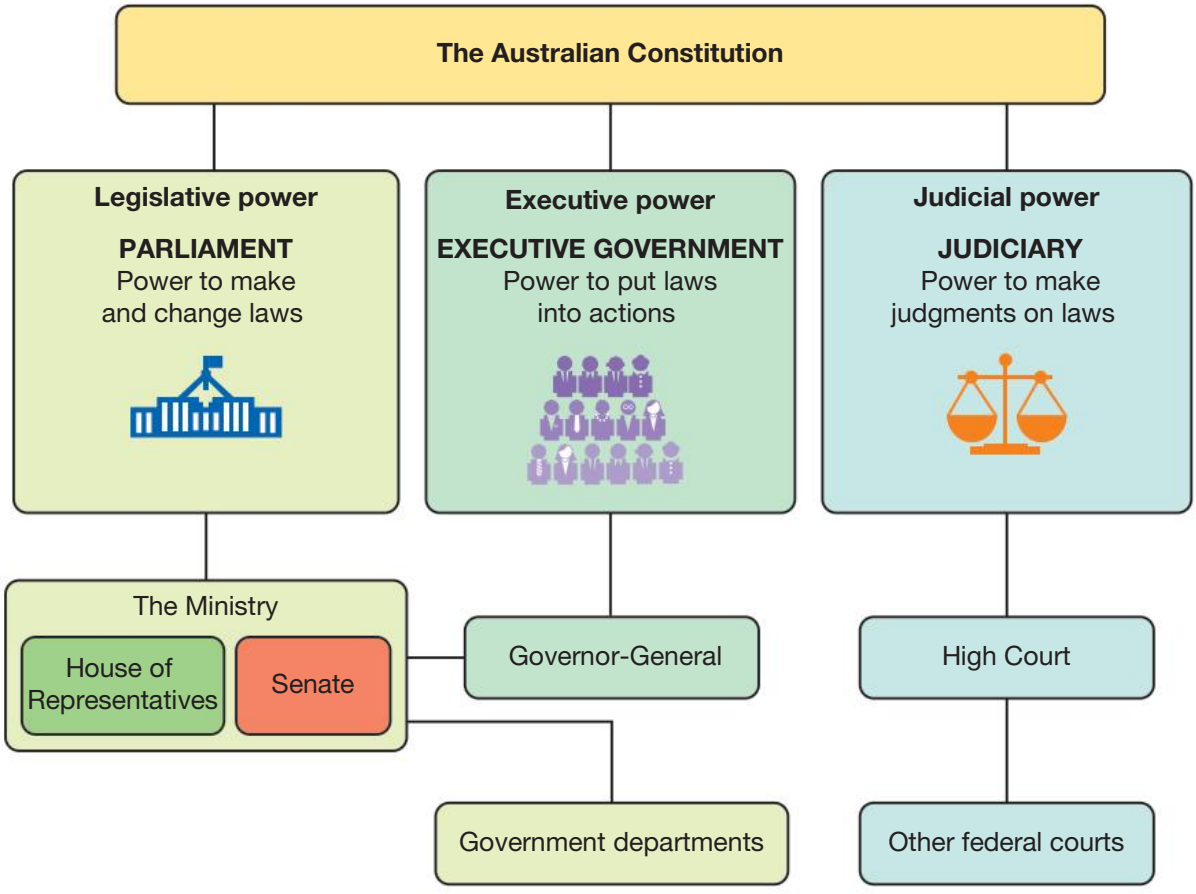
opposition the party or coalition that has the second-greatest number of seats in the House of Representatives and plays a critical role in developing a party platform that is different to the Government's. They will often disagree with Government decisions and policies

After the election: formation of government

After citizens vote at an election and results are decided, government is formed. Each representative, working on behalf of their electorate, now becomes a **Member of Parliament** (MP). They represent the parliamentary arm of government (see Figure 7.33) and are able to engage in activities such as:

- discussing important issues
- debating laws
- voting on changes and new policies or laws.

When a certain party, or a coalition, have the largest representation of seats within the House of Representatives (lower house) this is called **parliamentary majority**. The governing party is referred to as the Government, whereas the party, or coalition, with the second-greatest number of seats is called the **Opposition**. It is much easier to pass bills (proposed laws) and direct policy initiatives when there is a parliamentary majority; however, this doesn't always happen.



▲ **Figure 7.33** Separation of powers in the Australian Federal Government, as dictated by the Australian Constitution

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Sometimes, a **hung parliament** occurs, whereby no party has the majority of seats. The Governor-General appoints a 'caretaker' Prime Minister while negotiations on who will be the governing party take place. At this stage, no party is considered having won the election.

Achieving a majority can now only happen by forming an agreement with minor parties or independents, which is a situation referred to as **minority government**. These types of situations can make it very challenging for parliament to achieve their goals because people disagree. However, independents play an important role in these circumstances and can sometimes hold the **balance of power**, whereby their vote alone decides whether a bill is passed or rejected. In a majority government, the governing party holds the balance of power.

hung parliament a post-election situation in which no political party has secured enough seats to become the governing party

minority government a way of resolving a hung parliament whereby the leading party who does not have enough seats to govern must form an alliance with minor parties to win support

balance of power in a minority government this is a position held by a minor party or an independent whereby their vote is necessary for a bill or motion to be passed. In a majority government, the governing party holds the balance of power

Interesting fact

In 2010, for the first time in over 70 years, Australia's Federal election resulted in a hung parliament. Both the ALP and the Coalition held exactly 72 seats each. The ALP negotiated support from four other MPs to form a minority government.

▼ **Figure 7.34** Opposition leader, Peter Dutton, addresses Parliament.



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party discipline the control that party leaders have over their Members of Parliament

In Australia, **party discipline** is strong and is a way of ensuring the loyalty of Members of Parliament to their political party. This practice is seen as essential to the government in retaining support, presenting a 'united front' and passing bills in Parliament. However, it has gained criticism for limiting a representative's ability to exercise their own judgement and engage in meaningful debate.

One way that party discipline is maintained is through the appointment of a party 'whip'; a person who is responsible for exercising this discipline through actions such as suspension of Members from party meetings or limiting a Member's level of responsibility.

To learn more about how Parliament works, including how laws are made, continue to the next chapter.

DEVELOPING YOUR UNDERSTANDING 7.2

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** the concept of a 'representative democracy'.
2 **Describe** the concept of a 'party platform', using examples.
3 **Explain** the difference between a parliamentary majority and a minority government.
4 **Explain** how a hung parliament occurs.
5 **Describe** the concept of 'balance of power'.

Interpret

6 Interpret section 7.4 to **explain** how political parties and candidates seek to influence citizens' voting choices at elections.

Argue

7 Consider the pros and cons of different voting systems to **evaluate** the preferential voting system.

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End-of-chapter assessment

1 Short-answer questions

1 **Describe**, using examples, how Australians can participate in democracy.
2 **Explain** how voting has changed in Australia since Federation.
3 **Explain** the role of the Australian Electoral Commission.
4 **Describe**, using examples, a range of strategies used by political parties and independent candidates to influence citizens' electoral choices.
5 **Explain** the difference between preferential voting and proportional representation.
6 **Explain** how government is formed at a Federal level in Australia.

2 Extension task

Investigating current State parliament

Access the Queensland Parliament website and locate their list of Current Members.

Organise your findings in a table that shows the Member of Parliament's:

- name
- position, such as the electorate they represent and/or their Ministry role
- political association, such as their political party or whether they are an independent.

Review your findings to answer the following questions:

1 **Analyse** the composition of the current Queensland parliament.
2 **Explain** potential challenges that may arise as a result of this composition.

3 Classroom activity

Uluru Statement from The Heart

Working in pairs or small groups, **create** material (e.g. artwork, poster, presentation) that educates young people about the Uluru Statement from The Heart.

As a part of this project, you must:

1 **Investigate** The Statement to gather and organise relevant information from a variety of reliable sources.
2 **Analyse** your findings to explain The Statement, as well as the key issues and perspectives surrounding it.
3 **Describe** how citizens have participated in the campaign, as well as the current outcome of this engagement.



▲ **Figure 7.35** First Nations activist, Thomas Mayo, travels around Australia to educate and gain support for the Uluru Statement from The Heart.

Digital resources

Visit the Interactive Textbook or Online Teaching Suite to access:

- General Capability Project
- Interactive chapter Quiz
- Interactive Scorcher Quiz
- Videos, image galleries and other extra materials.

SCORCHER

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CHAPTER 8: Laws and citizens

Setting the scene: new laws for Queensland

Each year, parliamentarians are hard at work scrutinising legislation. Some laws are passed and come into force, while others do not make the list. In 2022, Queensland Parliament passed 35 bills, some as amendments to existing legislation and others were newly introduced.

Continue reading to learn more about some of the bills that passed in 2022.

Police Service Administration and Other Legislation Amendment Act 2021

Assent date: 20 May 2022

This Act grants Queensland police additional powers such as the power to:

- Require a name, address and reason for entry to a state building
- Use electronic screening devices and inspect the belongings of someone entering a state building
- Search a person or vehicle without a warrant
- Direct a person to leave a state building or place a person in the detention of protective services officers.



▲ **Figure 8.1** A person arrested during schoolies celebrations in 2014.

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Child Protection Reform and Other Legislation Amendment Act 2021

Assent date: 20 May 2022

This Act makes important changes to a number of child protection-related legislation, such as:

- Under the *Child Protection Act 1999*, a child now has the right to express his/her views about what is, and is not, in his/her best interests. It also grants the child opportunities to participate in and be given information about decisions that relate to him/her.
- The definition of 'kin' was updated so that Aboriginal and Torres Strait Islander children can be placed in care with people who are considered kin by way of a legitimate cultural connection to the child.



▲ **Figure 8.2** If a person is unable to voice their views and opinions, it can lead to stress, frustration and depression.

Transport Legislation (Road Safety and Other Matters) Amendment Act 2022

Assent date: 7 September 2022

This Act has been updated with the aim of improving road safety and streamlining measures, including:

- Using penalties collected from camera-detected offences to fund road safety education and awareness, support the rehabilitation of those who have been injured in a road crash and further develop infrastructure and technologies to improve the safety of State-controlled roads.

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- Those operating a motorised mobility scooter or wheelchair must be able to provide evidence of registration when requested.
- Those travelling on a shared path, such as a footpath or bicycle path, on a motorised mobility scooter or wheelchair must not exceed a 10 km/hour speed limit.



▲ **Figure 8.3** E-scooters have become a popular method of short-distance transport in Brisbane since 2019.

Nature Conservation and Other Legislation Amendment Act 2022

Assent date: 21 October 2022

For the purpose of environmental protection, this Act makes adjustments such as:

- Penalties for impersonating a forest officer or ranger
- New powers for conservation officers to seize or remove items left on State land, used to commit an offence on the land or for the purpose of protecting native wildlife.

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▲ **Figure 8.4** A guide shows a freshwater turtle to visitors to Cobbold Gorge, near Georgetown, Queensland.

ACTIVITY 8.1
COGNITIVE SPOTLIGHT: DISCUSS

Write down your answers to the questions below, and then **discuss** these with a class peer.

1. Why was each legislation passed through Parliament?
2. To what extent do you believe that these laws reflect the needs and wants of Queensland communities?
3. What new laws would you table at Parliament if you were elected to represent your community at a state level?

Be prepared to share your responses with the class.

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Chapter overview

Introduction

Laws keep society in order and protect its people from being taken advantage of, abused, mistreated, or worse. Therefore, it's important you know how these laws of a society are created and implemented. In this chapter, you will learn about laws in Australia – how they are made as well as what types of laws there are and what characteristics laws in Australia have. You will see examples of these types of laws and read about various case studies which resulted in legislative changes to these laws.

Learning goals

By the end of the chapter, students will be able to:

- explain the characteristics of laws, how laws are made and the types of laws in Australia.



▲ **Figure 8.5** Voters arrive at a polling booth in the electoral seat of Dickson on 21 May 2022.

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8

8.1 How laws are made in Australia through Parliament and the courts

FOCUS QUESTIONS

- What are the characteristics of laws in Australia?
- What is the process of law-making in Australia?
- How is Australian law-making influenced by government processes and different cultural and social perspectives?
- What is the difference between criminal and civil law?
- What is common law?
- What is executive law?
- How is customary law for First Nations Australians significant?

What are the characteristics of Australia's laws?

Every country worldwide has a legal system. That is, a process by which laws are made and enforced. However, not all countries' legal systems are the same, as they are generally founded on the values, beliefs and behaviours of the people of that country. That is, Australia and its people set the standard for how we believe individuals, organisations and government should behave. But what makes a good law? Let's explore this question to better understand the purpose and functioning of Australia's **legal system**.

legal system a process, including the individuals and organisations involved in this process, by which laws are made, interpreted and enforced in a country



THINKING DEEPER

What characteristics do you believe are most important to consider when making a 'good law'?



▲ **Figure 8.6** Many things need to be considered when laws are created in Parliament and in the courts.

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ACTIVITY 8.2
MAKING THINKING VISIBLE

Think, pair, share: what makes a good law?

Consider the characteristics of what makes a good law, which are provided in the table below.

▼ **Table 8.1** Characteristics of a good law

Reflects society's values and moral standards	Are enforceable	Are clear and easily understood
Are communicated to and known by those in the community	Protects the freedoms of individuals and their fundamental human rights	Ensures the safety of the community
Are relatively stable/ unchanging	Rewards those who behave well in the community	Includes strong punishments for breaches
Reflects the views of most people in society	Reflects the views of well-educated people in society	Are applied equally to everyone in the community

1 *Think* – Individually, **identify** which three characteristics you believe are most important in making a good law.
2 *Pair* – With a class peer, share your chosen characteristics. **Compare** your selections for similarities and differences and **discuss** reasons for your choices.
3 *Share* – In groups of four, work together to **decide** on the characteristics you agree answer the question – 'What makes a good law?' You may include some of your own characteristics if you wish. Be prepared to share your list with the class.

Australia's legal system was developed from the characteristics and processes of the legal system of Britain, and began operating somewhat independently from Britain in the mid-to-late 1800s. However, it was not until Federation in 1901 that Australia became fully independent, legally.

At the time of Federation, Australia's population was around 4 million people, with 58 per cent of the population being born in the United Kingdom, with another 21 per cent born in Ireland, reflecting colonisation.

Today, Australia is home to over 25 million people, with only 3.6 per cent of the population having been born in England. The 2021 Census reveals greater diversity, with persons born in India, China, New Zealand and the Philippines representing a greater proportion of the Australian population. However, only 27.6 per cent of the total population were born overseas. In addition, 3.2 per cent of the population identify as Aboriginal and/or Torres Strait Islander, a figure equal to, and often greater than, the number of people born in the top five overseas countries.

So, what does all of this data mean for Australia's legal system? With the country now being as multicultural as ever, how is our legal system affected?

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THINKING DEEPER

To what extent is, or should, Australia's legal system affected by different cultural and social perspectives seen in the country today, such as that of migrants, First Nations Australians and Australian-born citizens?

How laws are made through Parliament

THINKING DEEPER

What do you already know about how Australia's parliaments operate?

In Chapter 7, you learned how Australia's liberal democracy allows citizens to vote for people to represent their interests. These elected representatives form Australia's Parliament.

At a federal level, each elected representative holds a seat in parliament's lower house – the House of Representatives. Here, politicians introduce, debate and vote on the country's laws.



▲ **Figure 8.7** Inside the House of Representatives, Canberra

Similar processes apply in state parliaments.

When laws are created by Parliament, this area of law is referred to as **statutory law**. Each law starts as a **bill** and goes through a series of steps before it can become a statute, otherwise known as an **Act of Parliament** (Act) or legislation.

A law must pass through the lower house before proceeding to the upper house – Senate – to become a statute. Having two parliamentary chambers is called the **bicameral system**.

statutory law a type of law that is enacted by being passed by Parliament

bill a draft of a proposed law that is introduced to Parliament

Act of Parliament what a law is called when it has passed through Parliament successfully

bicameral system when there are two parliamentary chambers (houses) that laws must pass through

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ACTIVITY 8.3
COGNITIVE SPOTLIGHT: EXPLAIN

The path of a bill explained

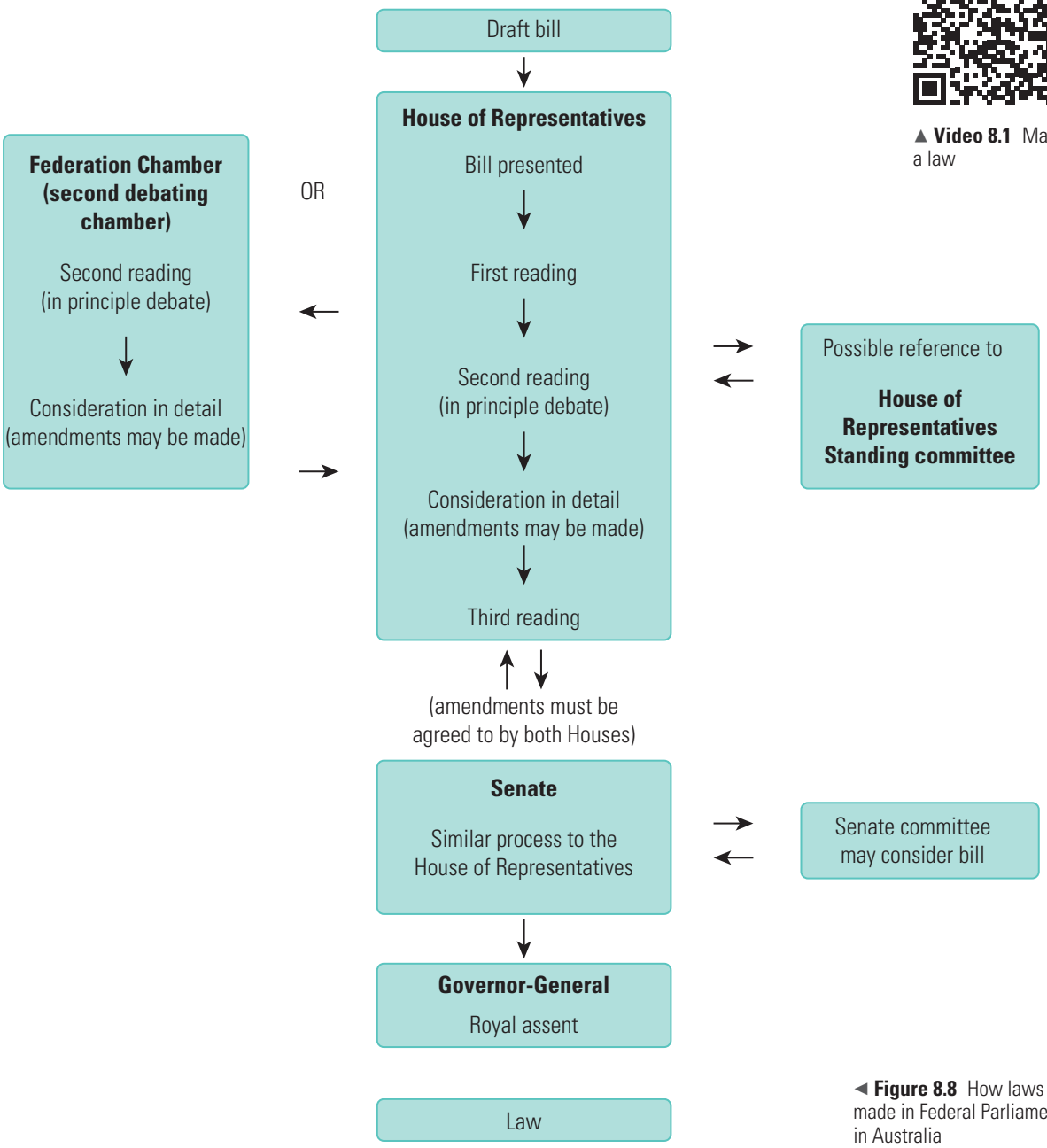
Watch Video 8.1, and then **conduct** further research by accessing the 'Making a law in the Australian Parliament' page of the Parliamentary Education Office.

Interpret the information provided to:

1. **Describe** how bills are first started.
2. **Explain** the difference between the three readings of a bill.
3. **Explain** the role of parliamentary committees during the path of a bill.
4. **Explain** what is meant by the term 'royal assent'.

Figure 8.8 depicts the process of introducing a bill in Parliament and creating statute law.

▲ **Video 8.1** Making a law



◄ **Figure 8.8** How laws are made in Federal Parliament in Australia

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ACTIVITY 8.4
COGNITIVE SPOTLIGHT: CONSTRUCT

Making law in Queensland

Within Australia, Queensland has a unique parliamentary system in that it only has one chamber – the Legislative Assembly. This is a unicameral system – laws only pass through one house of Parliament.

Investigate Queensland's parliamentary system to:

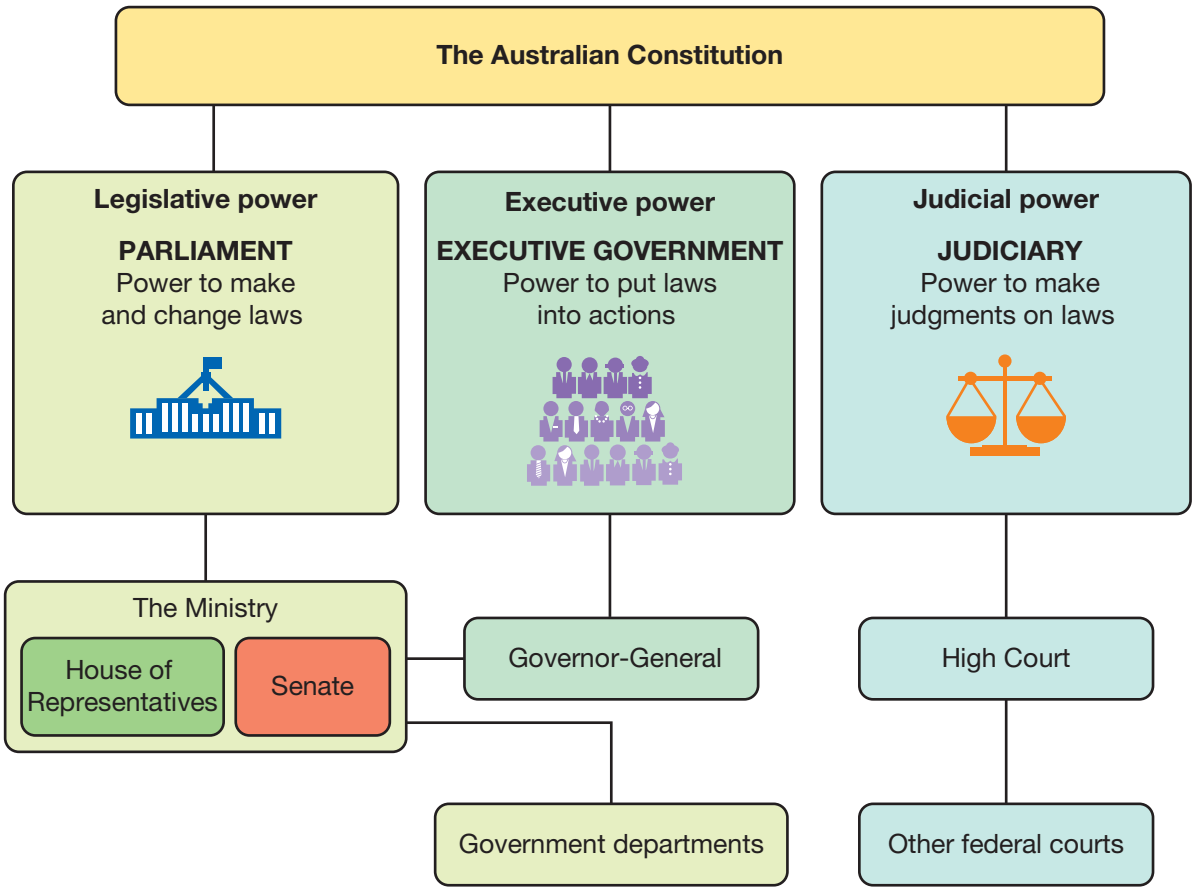
1. **Explain** how bills can originate before being presented to Parliament.
2. **Construct** a diagram that illustrates the path of a bill in Queensland Parliament.
3. **Explain** the role of the Governor of Queensland in the law-making process.
4. **Analyse** the advantages and disadvantages of operating under a unicameral system of Parliament.

Correctly reference the sources you used to gather this information when developing your responses.

How laws are made through the courts

Another way that laws in Australia are made is through the court system.

In Australia, Parliament and the courts have separate authority under the Australian Constitution's separation of powers (see Figure 8.9). However, once laws are made in Parliament, the judiciary plays a crucial role in interpreting and applying these laws.



▲ **Figure 8.9** Separation of powers in the Australian Federal Government

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common law
law that is made by judges through decisions by earlier courts and an understanding of the present situation

Despite the main role of courts being to charge people who have committed a crime or to settle disputes between multiple parties, they also play an important role in making new law where there is no existing law to judge on. This type of law is called **common law** but is also referred to as case law.

This system is based on an understanding of tradition or custom. Judges make decisions based on how similar cases have been heard in the past. The rules that govern common law is known as the doctrine of precedent.

Where no existing law can be used to make a decision or in a situation where there are no similar cases, new precedent can be set that leads to the creation of a new law.

CASE STUDY 8.1

UberEats

Popular food-delivery service UberEats gained media attention in 2020 when a case was brought against the company for the unfair dismissal (firing) of one of their delivery drivers.

According to the driver, she was fired for delivering a customer's order 10 minutes late. However, the company argued that she was not technically an employee. Under UberEats' (and main company, Uber's) business model, drivers are self-employed contractors and are granted flexibility in choosing which delivery jobs they want to complete.

In Australian statute law, only employees are entitled to unfair dismissal claims, among other benefits such as sick leave, holiday pay and a minimum wage. Independent contractors are not granted these same rights.

A further case, where a delivery driver died on the job, was being proposed by the Transport Workers' Union in 2021. The union argued for a workers' compensation claim, despite independent contractors not being entitled to this type of claim.

The unfair dismissal case was settled outside of court, allegedly to avoid media attention and legal ramifications. However, if the Federal Court were to make a decision that recognised the claim, it could have set a powerful precedent for the status of gig-economy workers across the country.

Interestingly, other countries are encountering the same dilemma. In 2021, the Spanish government passed a new Rider Law, which requires these gig-economy companies to hire their workers and provide them with the correct employment benefits.

This new-age gig economy – previously known as the 'sharing economy' – is characterised by people working in temporary and flexible jobs. These jobs are typically paid per output of work and workers are not permanently linked to a company. Instead, they act as independent contractors. Companies other than Uber who are operating under this model in Australia include Airbnb, Airtasker and DoorDash.



▲ **Figure 8.10** UberEats drivers are self-employed contractors.

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ACTIVITY 8.5
COGNITIVE SPOTLIGHT: INTERPRET

UberEats and a new precedent

Interpret the information in Case study 8.1 and **discuss** in pairs:

'If the Federal Court judge decided that the driver had been unfairly dismissed from UberEats, what would this mean for future decisions about gig-economy employment?'

How governments can introduce new rules and regulations without Parliament voting on them

When statutory law is created, carrying out the specifics of the legislation will become the responsibility of the executive branch of government.

The executive is defined by Australia's Constitution and is one of the three arms of government in the separation of powers.

Sometimes, after legislation passes Parliament, an Act will delegate power to the executive to carry out and create the specifics of the Act. This power is known as **executive law** (or delegated law). When this happens:

- The law is assigned to a department (such as health or education) and the government minister responsible for that department.
- The government minister and their team can make detailed rules and regulations to enact the new law.
- The minister is provided with power to appoint people to particular positions to oversee certain areas of the legislation and its regulations.

executive law legislation that is made under the direction of an Act of Parliament by the executive branch of government, after it is passed through Parliament



▲ **Figure 8.11** Finance Minister Katy Gallagher delivers the 2022 Federal budget

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However, to ensure the decisions made under executive law are appropriate, they need to be presented to Parliament for approval. Figure 8.12 represents the procedure for processing executive law in Parliament.



▲ **Figure 8.12** How executive (delegated) law is processed in Parliament

DEVELOPING YOUR UNDERSTANDING 8.1

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Describe** the characteristics of laws in Australia.
2 **Describe** the path of a bill.
3 **Describe** the concept of 'precedent'.
4 **Explain** the difference between how statutory laws and common laws are made.

Interpret

5 **Interpret** section 8.1 to **explain** the relationship between Parliament and executive law-making.

Argue

6 Argue the pros and cons of Queensland having a unicameral system, rather than a bicameral system as in other states. Form an opinion as to which suits Queensland more and **explain** why you think this is the best option.

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8

8.2 The types of laws in Australia

Like there are different ways that laws are made in Australia, there are also various types of laws. These are:

- criminal law
- civil law
- customary law.

Criminal law

Criminal law prosecutes a person for committing a crime, officially defined by legislation. A crime is an offence that is deemed punishable for its disregard of behaviours considered acceptable by the general public.

criminal law an area of law that deems certain actions punishable, defines criminal acts and provides guidelines on sentencing offenders of these acts

The crimes listed below, of a serious nature, are heard in the District or Supreme Court. In Queensland, the legislation that covers this area of criminal law is the *Criminal Code Act 1899 (Qld)*, known as 'the Code' in short.

The Code covers a comprehensive range of offences, including, but not limited to:

- arson
- assault
- burglary
- corruption and bribery
- fraud
- homicide
- kidnapping and abduction.

A less serious crime is generally heard in the Magistrates Court and includes offences such as trespassing, public nuisance, graffitiing or speeding. In Queensland, these are covered by the *Summary Offences Act 2005* (Qld).



▲ **Figure 8.13** The police play a crucial role in investigating crimes.

Interesting fact

According to the Queensland Police Service, the Brisbane region recorded over 108 000 criminal offences in 2022.

Australia's criminal law system plays a fundamental role in protecting the rights and freedoms of individuals and organisations. For example, it ensures that basic human rights, as outlined in the United Nation's Declaration of Human Rights, are protected, like the right to life or the right to privacy.

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THINKING DEEPER

What other rights and freedoms are protected by Australia's criminal law system?

ACTIVITY 8.6
COGNITIVE SPOTLIGHT: INVESTIGATE

Criminal activity

Investigate crimes recently committed in your region or city in order to **analyse** how well Queensland's legal system:

a upholds important characteristics of the law, and
b protects the rights and freedoms of the victim and the person accused of the crime.

In doing so, you must:

1 Develop research questions.
2 Locate, select and **organise** your findings from a variety of credible sources, in a way that supports your analysis.
3 **Create** a short (200–300 word) paragraph to **communicate** your analysis.

Civil law

civil law an area of law that sets out the rights and responsibilities of how parties, such as individuals, government or private organisations, interact with each other

Civil law deals with matters where the rights and responsibilities of a party (individuals, organisations or government) have been breached. A civil proceeding occurs when one party sues another party for not meeting obligations.



▲ **Figure 8.14** Divorce settlements are a common matter dealt with under civil law.

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Example civil law cases include:

- divorce
- child custody
- road and traffic offences such as speeding or not wearing a seatbelt
- unfair dismissal from employment
- contract term breaches
- defamation.

Depending on the severity of the case, civil matters are heard in almost any Australian court.

Civil law also plays an important role in protecting the rights and freedoms of individuals and organisations. For example, the *Anti-Discrimination Act 1991* (Qld) and associated Federal legislation such as the *Racial Discrimination Act 1975*, make it illegal to treat anyone differently on the basis of various personal characteristics, particularly when it comes to issues of education and employment. If an organisation has unlawfully discriminated against an employee or potential candidate, a civil case could be pursued for penalty or compensation.

CASE STUDY 8.2

Uber cops a $21 million fine in Federal Court

Popular ride-sharing company, Uber, came under fire throughout 2022 for misleading customers in relation to their fare estimates and trip cancellation fees.

The Australian Competition and Consumer Commission lodged the case in April, after receiving complaints that, for almost four years, Uber's app mislead over 2 million customers regarding cancellations. The app displayed the message 'You may be charged a small fee since your driver is already on their way' when customers attempted to cancel their trip, despite it occurring in the business' own five-minute cancellation period.

In addition, Sydney customers received incorrect and overly-high price estimates when using the app's Uber Taxi option. However, the Court found that these fares were overestimated 89% of the time.

Overall, Uber was forced to pay an $18 million penalty for the misleading cancellation message and $3 million for the underestimation of charges, both of which contravene Australian Consumer Law.



▲ **Figure 8.15** Customers have been left out-of-pocket after Uber cancellations.

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ACTIVITY 8.7
COGNITIVE SPOTLIGHT: INTERPRET

Interpret Case study 8.2 and, in pairs, **analyse** the outcome of the case with regards to how well it has protected the rights of the company and of the customers.

Customary law

customary law legal systems and practices uniquely belonging to Indigenous Australians

First Nations peoples have had their own laws and legal systems for tens of thousands of years. The English legal system was brought to Australia through colonisation and imposed across the continent; the Australian legal system is derived from this English import. Many First Nations peoples have been able to maintain their own laws and legal systems; these are now referred to as **customary law**.

Customary law is codified in knowledge stories that are expressed in oral stories, artworks and performance. Customary law, just like criminal and civil law, provides the rules for how to behave, and the punishments for transgressions.

THINKING DEEPER

Why is recognising First Nations' customary law important?

Customary law is recognised in some instances but is subject to certain conditions under common law and Australia's Constitution.

CASE STUDY 8.3

Palaszczuk Government passes Meriba Omasker Kaziw Kazipa Act 2020

Tuesday, 08 September, 2020

Historic legislation passed in Queensland Parliament [on 08 September, 2020] has enabled legal recognition of Torres Strait Islander traditional child rearing practices.

Torres Strait Islander and Member for Cook, Cynthia Lui said the *Meriba Omasker Kaziw Kazipa (Torres Strait Islander Traditional Child Rearing Practice) Act 2020* is a huge step forward.

"For generations, Torres Strait Islanders have supported their children and each other in loving, supportive extended families.

"Until now, these family relationships have never been fully recognised in law. This Act means children and adults who've grown up with traditional adoptive parents will finally have their legal identity match their cultural identity.

"This supports and strengthens people's connection to community and culture," Ms Lui said.

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▲ **Figure 8.16** Queensland member for Cook Cynthia Lui speaks during Question Time at Parliament House in Brisbane, February 2020. Source: AAP

Kupai Omasker Working Group Chair and the first Torres Strait Islander social worker, Aunty Ivy Trevallion, said the legislation will address historic and lifelong issues raised in community consultation.

"We trust this legislation will help remove identification barriers for participation in important areas such as education, health, housing and finance to ensure our young people raised through traditional child rearing practices don't get left out," Aunty Ivy said.



▲ **Figure 8.17** Meriba Omasker Kaziw Kazipa Commissioner C'Zarke Maza and advocate Aunty Ivy Trevallion celebrate the world-first Cultural Recognition Order © *The State of Queensland 2022*

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Premier Annastacia Palaszczuk said the Bill would never have passed without Ms Lui's hard work.

"As the first Torres Strait Islander elected to Queensland Parliament, Ms Lui has led this very important and proud day for the people of the Torres Strait," the Premier said.

"Torres Strait Islander leadership has been advocating to have this cultural practice legally recognised for more than 30 years – aiming to bridge the gap between traditional lore and western law for caregivers and children from extended Torres Strait Islander families.

Cynthia Lui said the *Meriba Omasker Kaziw Kazipa Act 2020*, has been a long time coming.

"Legally recognising Torres Strait Islander traditional child rearing practice and acknowledging the strength of this enduring culture is a historic milestone in the Queensland Government's journey to reframe its relationship with First Nations peoples," Ms Lui said.

"It enables people to apply for a birth certificate that reflects their lived identity, and opens easy access to government services such as financial support and school enrolment."

Minister for Fire and Emergency Services and Minister for Aboriginal and Torres Strait Islander Partnerships, Craig Crawford said Queensland was leading the nation with the first legislation of this kind in Australia.

"The Palaszczuk Government has partnered with Torres Strait Islander communities to deliver on its election commitment supported by a $1 million investment delivered over three years to support this historic outcome.

"It's important that our contemporary legal system evolves to recognise, accommodate and celebrate the diversity of Queensland families"
Mr Crawford said.

Torres Strait Ministerial Champion Shannon Fentiman met with families across the Torres Strait hearing from them directly about the importance of this legislation.

"This legislation will ensure Torres Strait Islander children and adults can have their legal identity match their cultural identity," Ms Fentiman said.

"This will mean they'll be able to have and do things that most of us take for granted, such as having a passport in their own name or being able to obtain a drivers licence."

Minister for Child Safety, Youth and Women Di Farmer said cultural background and identity were integral to the wellbeing of children.

"The translation of Meriba Omasker Kaziw Kazipa is 'for our children's children', but today it means so much more as we acknowledge the enduring culture that unites Torres Strait Islander families and communities," Ms Farmer said.

The Palaszczuk Government partnered with Torres Strait Islander communities to deliver the Act, which was developed with guidance from three appointed Eminent

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Persons — Ms Ivy Trevallion, Mr Charles Passi and the Honourable Alastair Nicholson AO RFD QC.

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Source: https://statements.qld.gov.au/statements/90694



ACTIVITY 8.8
COGNITIVE SPOTLIGHT: ANALYSE

1 **Interpret** the information in Case study 8.3 to **analyse** the significance of customary law to First Nations Australians.
2 **Describe** the impact of this legislation on the lives of Zenadth Kes (Torres Strait Islander) peoples.



DEVELOPING YOUR UNDERSTANDING 8.2



Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** the difference between criminal law, civil law and customary law.
2 **Identify** the name of the legislation governing crimes of a serious nature in Queensland and provide three example crimes it covers.
3 **Describe** the types of cases covered under civil law.

Interpret

4 **Interpret** section 8.2 to **explain** the concept of 'customary law' and **describe** why it needs to be considered in a different context to criminal and civil law.

Argue

5 Argue your opinion on what is a fair outcome for a large company who was found to have misled the public through their advertising.

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End-of-chapter assessment

1 Short-answer questions

1 **Describe** the characteristics of laws in Australia.
2 **Explain** the difference between how statutory law and common law are made.
3 **Explain** the difference between criminal and civil law.
4 **Explain** the concept of executive law.
5 **Describe** the significance of First Nations customary law in Australia, using examples.

2 Extension task

Integrating First Nations customary law with Australia's criminal law system

Indigenous Australians have, for thousands of years, lived in communities managed by long-standing, respected customary laws. This includes how acts deemed wrong, such as killing someone, are dealt with in communities. Punishments vary, but can be based on the wrongdoer's status or sex or the victim's behaviour or status. These punishments have included death, spearing and other corporal punishment, shaming or exclusion from one's community. However, upon colonisation, British systems and institutions, such as parliament, policing and the courts, were imposed on Indigenous peoples. This has, over time, caused a displacement of Indigenous customary law, with most punishments no longer practiced.

So, the question arises, to what extent should Indigenous customary laws in relation to acts deemed crimes by the modern legal system be upheld?

Below are a series of legal cases that help you explore this question. In each case, a serious crime has been committed and the offender sentenced.

Investigate one of the following cases, or an issue agreed with your teacher:

- *R v. Sydney Williams*
- *R v. Larry Colley*
- *R v. William Davey*
- *R v. Joseph Murphy Jungarai*
- *R v. Moses Mamarika*

Develop inquiry questions that allow you to locate, **select** and **organise** reliable and relevant information about the case, report, initiative or issue.

Review your research findings to answer the following questions:

1 **Explain** key facts related to the matter
2 **Analyse** potential challenges and differing perspectives associated with the matter particularly in relation to honouring First Nations customary law in the modern Australian legal system.

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3 Classroom activity

Young people and the law

Working in pairs or small groups, **create** material (e.g. artwork, poster, presentation) that educates young people about a topic of your choice from the list below, or one suggested by your teacher.

Topics:

- Influence of young people's perspectives on law creation in Australia
- New laws introduced in Queensland that will affect the lives of young people
- The rights and responsibilities of young people in relation to Australia's criminal law system
- The rights and responsibilities of young people in relation to Australia's civil law system
- The significance of First Nations customary law for young Indigenous people

As a part of this project, you must:

1 **Investigate** your topic thoroughly, using credible and relevant sources.
2 **Use** correct and appropriate legal terms and concepts.



▲ **Figure 8.18** Four people have been charged with murder for the brutal and fatal bashing of Perth teenager, Cassius Turvey, 15. The crime sparked outrage across Australia, with vigils held in different cities, such as this one in Brisbane.

Digital resources

Visit the Interactive Textbook or Online Teaching Suite to access:

- General Capability Project
- Interactive chapter Quiz
- Interactive Scorcher Quiz
- Videos, image galleries and other extra materials.

SCORCHER

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CHAPTER 9: Citizenship, diversity and identity

Setting the scene: this is me



▲ **Figure 9.1** Angela, an international university student from Argentina

This is Angela. She is a 21-year-old female from Argentina. Angela is an international student, studying a Bachelor of Business at university. She loves reading sci-fi novels, going to yoga with her friends and travelling to exotic destinations all around the world. Angela is hard-working and adventurous, but also kind. She volunteers once a week helping kids learn how to read, a value and interest she picked up from her mother. Angela's family is small – she is a sister to one younger brother. She is of Christian faith and an activist with organisations fighting poverty in developing nations. Angela is proud of who she is and where she is from.

ACTIVITY 9.1
TALKING POINTS – WHO ARE YOU?

Discuss ways or in what roles you define yourself:

- individually?
- within your family?
- within your community?
- within your country?

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Chapter overview

Introduction

Where you are born and the place you grow up in can make a huge impact on the type of person you grow up to be. We can belong to so many groups including age, school, sports team, religious, cultural, and sub-cultural. In this chapter you'll learn more about collective identities in Australia, citizenship, global citizenship and read perspectives and experiences of Australian national identity.

Learning goals

By the end of the chapter, students will be able to:

- identify ways in which Australians express different aspects of their identity
- explain perspectives on Australia's national identity.



▲ **Figure 9.2** Groups of people gather along the Brisbane River every week.

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9

9.1 Influences on our expressions of citizenship

FOCUS QUESTIONS

- What is meant by the term 'personal identity'?
- What is 'collective identity'? And how is it represented?
- How is Australia's national identity shaped and represented?
- What does Australia's citizenship process look like?
- What is the difference between legal citizenship, active citizenship and global citizenship?

How do individuals express different aspects of their personal identity?

We may all have distinctive ideas about what the term 'identity' means to us, which is perfectly understandable given that we are all individuals with diverse experiences that have shaped our values and beliefs.

personal identity a person's understanding and expression of their individuality

One's **personal identity** is their understanding and expression of their individuality. This includes elements such as our age, stage of life, interests, skills and more. Our individual identity can also be shaped by our sense of belonging to certain communities, such as our:

- family
- friendship circle
- sporting team
- place of worship
- workplace.

Furthermore, our identity is influenced by our:

- interests
- tastes
- attitudes, values and beliefs.

We feel a strong sense of connection to these areas of our life.



THINKING DEEPER

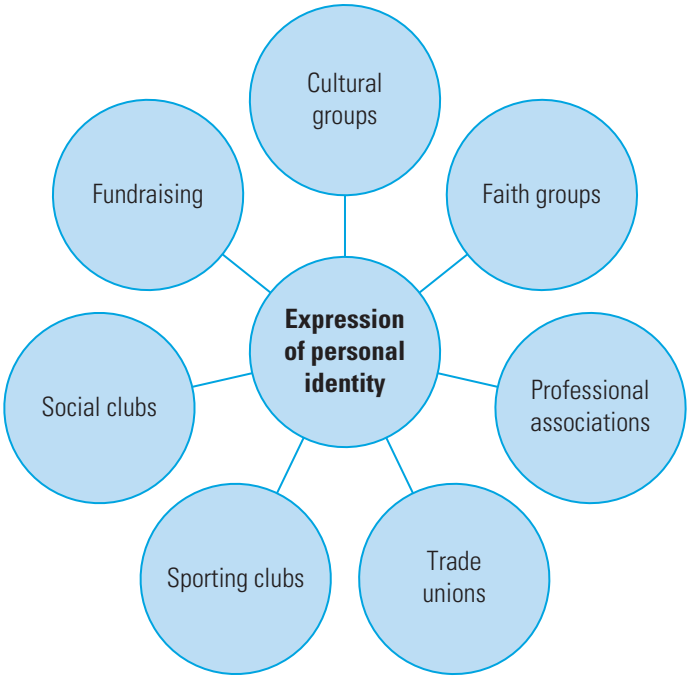
What does the term 'identity' mean to you?

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▲ **Figure 9.3** What factors have shaped your identity?

People can express their personal identity in many different ways, as seen in Figure 9.4.



▲ **Figure 9.4** Ways individuals express their personal identity



THINKING DEEPER

How do you express your personal identity? What communities are you a part of that provide you with a sense of identity and belonging?

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How are the collective identities of different groups in Australia's society represented?

Although we each have a personal identity that represents who we are as individuals, we can also each belong to groups which create a sense of a **collective identity**.

collective identity where a group shares defining characteristics based on its members' common experiences, interests and/or culture

A group's collective identity is often expressed through cultural norms, practices or artifacts and rituals. These expressions create a representation of the group and often lead to certain perceptions in the public domain.



▲ **Figure 9.5** The rainbow flag is a well-known symbol of the global LGBTIQA+ community.

THINKING DEEPER

Think of a group you belong to (e.g. cultural, school, religious) – what is this group's collective identity?

ACTIVITY 9.2
COGNITIVE SPOTLIGHT: ANALYSE

Exploring perception of collective identity

For this activity, you will work in pairs or groups of three.

Select a group type from the list below and narrow it down to a specific group of people.

- Cultural group; for example, First Nations Australians, a migrant group
- Religious group; for example, Christian, Islamic
- Geographic group; for example, rural, city
- Demographic group; for example, age, gender, sexuality
- Professional/workforce group; for example, teachers, lawyers
- Other, as negotiated with your teacher

Investigate the way this group's collective identity is represented and perceived. Locate sources such as news articles, community group/club websites, social media pages, opinion pieces, government reports and so forth that inform this investigation. **Organise** your findings into an **analysis** of the group's collective identity. Be prepared to share your analysis with the class.

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What are the different types of citizenship?

When you think of the word 'citizenship', what comes to mind?

You might imagine having a passport or voting in elections. However, citizenship is more than that, and there are different types.

LEGAL CITIZENSHIP

Legal citizenship is the most widely recognised form of citizenship. It means that, according to the law, the individual has the right to live and work in that particular country. They are granted certain rights such as voting in elections or referendums, obtaining a passport and having access to government programs such as free health care (through Medicare) and government assistance (through Centrelink). The most common way to obtain legal citizenship is by being born in that country.

legal citizenship is legally belonging to a country and receiving specific rights to live, work and engage in the country's political processes



▲ **Figure 9.6** The Australian passport

▲ **Video 9.1** Australian citizenship

Interesting fact

Over 5.7 million people have been granted Australian citizenship since 1949, when it was opened up to those born overseas.

THINKING DEEPER

Why would someone choose to become an Australian citizen if they are not already?

Video 9.1 is a citizenship story recorded for the Australian Department of Home Affairs. Watch the video, or another one from https://cambridge.edu.au/redirect/10255. What influenced this person's decision to become an Australian citizen and what benefits has this person found from it?

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ACTIVITY 9.3

Cognitive spotlight: investigate

Investigating Australian citizenship

Conduct research to develop your understanding about the legal processes involved in becoming an Australian citizen.

In doing so, ensure that you gather reliable data from various sources that allows you to:

1. **Analyse** the reasons why some migrants choose to become Australian citizens, while others choose not to.
2. **Explain** the process of applying for Australian citizenship.
3. **Explain** the types of questions asked in the citizenship test.
4. **Analyse** whether the process of becoming an Australian citizen, including the citizenship test, truly reflects Australia's national identity.

ACTIVE CITIZENSHIP

active citizenship refers to participation in one's community and displaying behaviours which are respectful, inclusive and others-focused

While legal citizenship is the most well-known form of citizenship, many individuals engage in **active citizenship**. That is, they get involved in their local community and display core values such as respect for people, property and processes, and inclusivity and support for others. Active citizens are often those people who are motivated to make a positive difference to their community and the lives of others. An example of active citizenship can be seen in Figure 9.7.

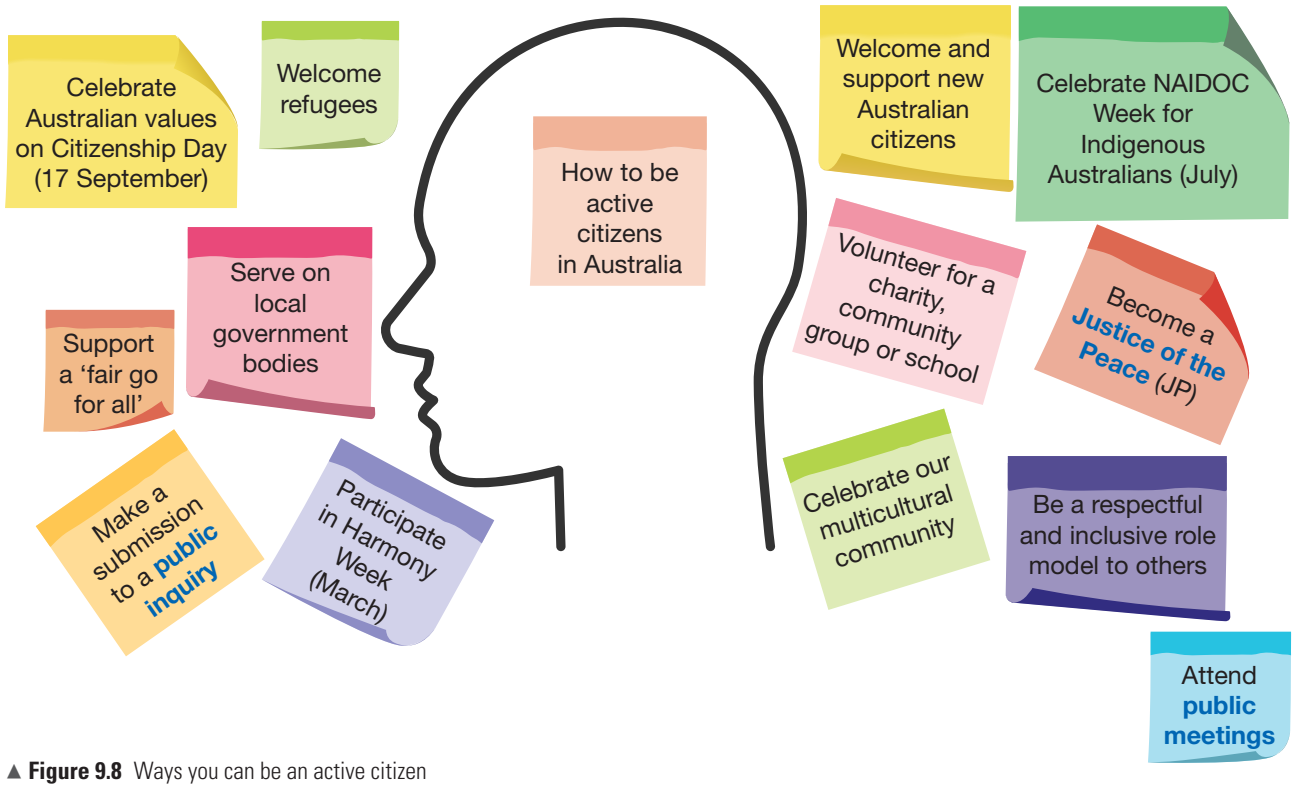
THINKING DEEPER

In what ways are you an active citizen?



▲ **Figure 9.7** Individuals and families plant gardens and clean up bushland as a part of the Save Our Waterways Now initiative.

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▲ **Figure 9.8** Ways you can be an active citizen

GLOBAL CITIZENSHIP

The final form of citizenship goes beyond the bounds of our own community and country. **Global citizenship** is about being a 'citizen of the world'; that is, making decisions about and getting involved in actions which consider the social, environmental and economic conditions that people experience globally. Essentially, you are a global citizen if you are aware of and understand the wider world.

ACTIVITY 9.4
COGNITIVE SPOTLIGHT: COMMUNICATE

How can I become a global citizen?

Working in pairs or small groups, **conduct** research to **identify**:

1. ways that young people can become global citizens
2. the benefits of engaging in global citizenship
3. a story about a young person/group of young people demonstrating global citizenship.

Communicate this information to other young people in your school for the purpose of encouraging them to be global citizens.

Justice of the Peace (JP) a community member who acts as an independent, impartial witness to official or legal documents (e.g., oaths or affidavits, statutory declarations, affirmations, signatures, document execution and original document certification)

public inquiry when members of the public are consulted and exposed to government policy matters. Public hearings allow for feedback on a draft policy report

public meeting when members of the public can meet to discuss or share information about an issue or proposal

global citizenship the act of engaging in and understanding social, environmental and economic issues affecting people worldwide

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▲ **Figure 9.9** Clean up the World is one of the largest, community-based, environmental programs in the world.

DEVELOPING YOUR UNDERSTANDING 9.1

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** the difference between active citizenship and global citizenship.
2 **Explain** the difference between personal identity and collective identity.
3 **Explain** the concept of 'legal citizenship'.

Interpret

4 **Interpret** section 9.1 to **describe** ways that people can express their:
   a legal citizenship
   b active citizenship
   c global citizenship.

Argue

5 *'The internet, along with easier and more frequent international travel, has made us less nationalistic and more open and susceptible to international influence.'* Argue your opinion on this statement.

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9

9.2 Exploring national identity in Australia: different experiences, perspectives and debates about Australia's national identity and citizenship

FOCUS QUESTIONS

- What is meant by the term 'national identity'?
- How is Australia's national identity represented and shaped?
- How is Australia's national identity significant in a globalised world?

What does it mean to be Australian?

Now that you better understand the concept of 'identity', how does the term 'national identity' differ?

National identity refers to a sense of belonging a person has to their nation and to the perception of a nation as a cohesive, unified whole. A nation's identity can be shaped by various factors such as:

- traditions
- cultural norms, practices and celebrations
- a common language
- its political and legal system
- geography
- standard of living
- immigration and multiculturalism.

national identity a sense of belonging a person has to their nation and to the perception of a nation as a cohesive, unified whole



◄ **Figure 9.10** Every individual's definition of Australian identity is unique.



THINKING DEEPER

How would you define Australia's national identity?

A nation's identity can change over time and is also strongly influenced by history. For example, key historical events form rituals for years to come, like ANZAC Day. However, the way a country's population changes throughout history can also play a part in shaping a nation's identity. In Australia, for example, the population has evolved from a mostly European and First Nations population, to one which people from all corners of the globe call home.

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THINKING DEEPER

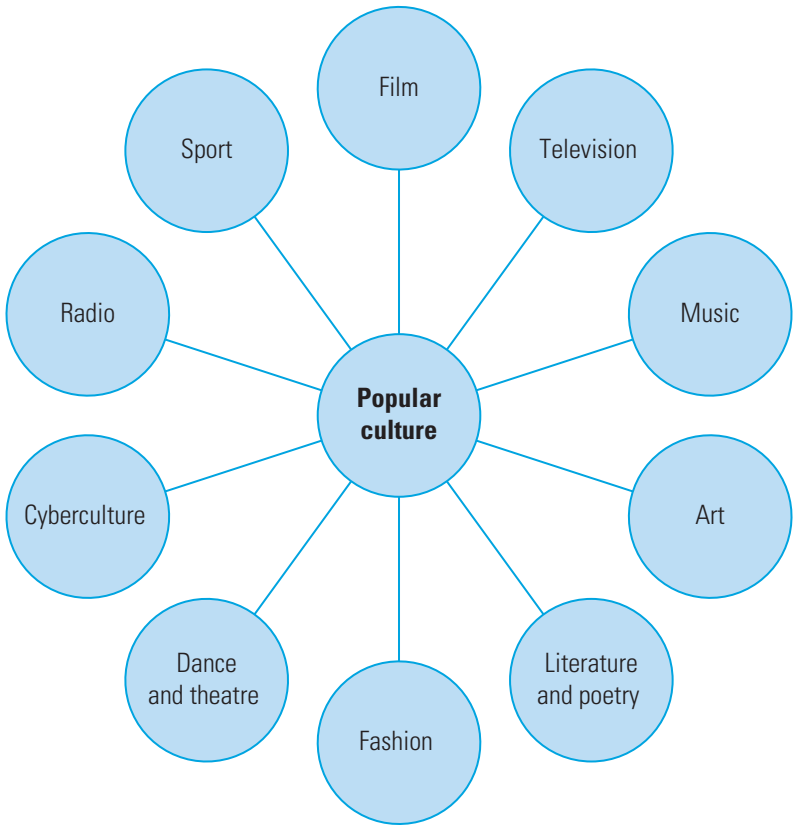
What is the role and significance of Australia's national identity in this modern, globalised world?

The media plays a large role in communicating and contributing to a sense of national identity. They report on issues of national importance and engage the general public in debate and meaningful conversation on various topics. The media can include:

- newspapers and news websites
- free-to-air broadcasting services on television
- pay TV
- radio stations
- social media platforms.

Popular culture is also critical in portraying a country's identity. Figure 9.11 identifies elements of popular culture.

popular culture generally refers to a set of practices, ideas and products that embody the broad tastes of society



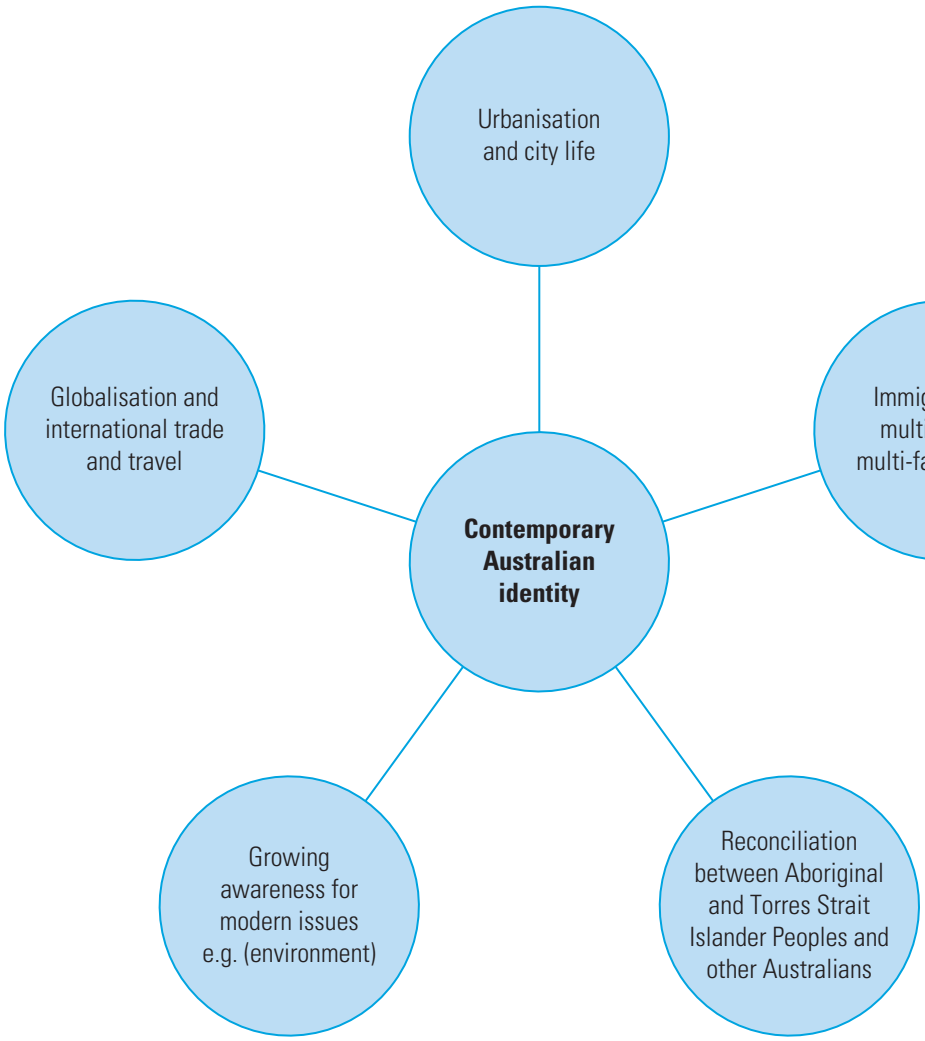
▲ **Figure 9.11** Elements of popular culture

Interesting fact

The 1986 Australian film *Crocodile Dundee* was significant in creating a stereotypical view of Australia and its people across the world – particularly in the United States of America.

While many representations of national identity in events, the media and popular culture are steeped in strong tradition and history, there are other elements that contribute to a contemporary view of Australia's identity. Figure 9.12 provides some examples.

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▲ **Figure 9.12** Contemporary influences on Australia's national identity



THINKING DEEPER

What are the key factors you believe have been shaping Australia's national identity in recent years?



CASE STUDY 9.1

Exploring Australian identity

Australia is as diverse geographically as it is culturally. What it means to be Australian has shifted over time and with changing influencing factors. Where our national identity was once shaped by activities and traditions associated with British colonisation and early European migration, now the country sees greater diversity. Further, the experiences and perspectives of First Nations Australians are more widely acknowledged and appreciated.

Below are a series of case studies which represent variations of the concept of 'Australian identity'.

Case study 1: Meera*

Meera is a 26-year-old woman who lives in Brisbane. Meera and her mother are Turrbal women and her father is an Indian man who migrated to Australia in the 1980s.

For as long as she can remember, she has had random strangers ask her, 'where are you from?'. When she answers 'Australia', they interrogate further, 'but where are you REALLY from?'.

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It's unnerving. All too often, when she tells them she's both Aboriginal and Indian, she's met with comments about how unique she is. Meera is proud of her cultural heritage and loves being an Australian.

Case study 2: Awer Mabil

Young Australian of the Year for 2023, Awer Mabil, has a lot to be proud of. Not only is he a Socceroo, but he has co-founded the not-for-profit organisation, Barefoot to Boots with his brother Awer Bul. The organisation provides various items, such as football gear, to people living in refugee camps.

Originally from Sudan, Mabil and his family fled the country during its civil war and ended up in a refugee camp in Kenya. Arriving in Adelaide when he was 10 years old, Mabil's love of kicking a football led him to a local community club – a 45-minute scooter ride from his house. His hard work, determination and positive attitude paid off, with Mabil having now played for Australia in two FIFA World Cup events.



▲ **Figure 9.13** Awer Mabil during the FIFA Mens World Cup 2022 in Qatar

Case study 3: Donald*

Born in 1939 to parents of British descent, Donald has experienced the ups and downs of Australia's history. When he was growing up, Donald recalls a strong sense of mateship among his community. He says, 'if someone was doing it tough, we'd all just pitch in and help out. That's just the way things were back then.'

Donald left school when he was 15 to start work as a labourer in a railway factory. During his time at the factory, he remembers that his bosses were always very strict and the workers had a strong work ethic, but on a Friday afternoon, they'd all celebrate the end of the working week together with a beer at the local pub.

'They were good days', Donald says, 'A lot has changed since then.'

Case study 4: Talei Elu

Queensland's state recipient for the Young Australian of the Year award in 2023 is proud Saibai Koedal woman, Talei Elu.

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After spending six years working for the Federal Government, Talei returned to her Torres Strait Islander community of Seisia (Cape York) during the pandemic. Using her experience and skills, she worked hard to advocate for local issues, such as helping the Indigenous community enrol to vote, organising free feminine hygiene, baby and self-care products for women, providing free sports equipment hire for youth through her organisation, Seisia Sports and Rec, and much more.

Speaking with ABC News about the award and her work, Talei said, 'I feel like we've set a lot of the foundations to be able to become much more politically savvy in the future.'



◄ **Figure 9.14** Talei Elu (centre) at the 2023 Australian of the Year awards ceremony

* Details included in this case study are fictional.

ACTIVITY 9.5
COGNITIVE SPOTLIGHT: ANALYSE

Examine the case studies provided to:

1 **Analyse** the historical representations of Australia's national identity.
2 **Analyse** the contemporary representations of Australia's national identity.

DEVELOPING YOUR UNDERSTANDING 9.2

Review questions

Complete the Quiz in the Interactive Textbook, and answer the questions below on paper or in the Interactive Textbook.

Recall

1 **Explain** the number of factors that can shape a nation's identity.

Interpret

2 **Interpret** section 9.2 to **describe** some of the contemporary influences on Australia's national identity.

Argue

3 To what extent do you believe that popular culture and the media contribute to a collective sense of Australian identity?

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End-of-chapter assessment

1 Short-answer questions

1 **Describe** three ways that people express different aspects of their personal identity, including examples.
2 **Explain** how culture and religion influences how a person or group expresses their sense of citizenship.
3 **Explain** the difference between legal citizenship, active citizenship and global citizenship.
4 **Describe** the concept of 'national identity', using examples.
5 **Explain** three factors which shape debates about Australia's national identity.
6 **Explain** the advantages and disadvantages of choosing to become an Australian citizen for someone who was born overseas.

2 Extension task

Australian of the Year

Locate the current list of award recipients for the Australian of the Year awards.

Select one award recipient and **conduct** research to better understand the situation that led to this person receiving the award.

Organise and review your findings to answer the following questions:

1 **Identify** and **analyse** the judging criteria for a person to receive the specific award; for example, Young Australian of the Year.
2 **Explain** the ways in which the chosen recipient has met the criteria for the award.
3 **Describe** how this person's citizenship has contributed to positive change.

3 Classroom activity

National symbols and national identity

Working in pairs or small groups, **create** material (e.g. artwork, poster, presentation) that explores the connection between an Australian symbol and the country's national identity.

As a part of this project, you must:

1 **Select** a national symbol from the list below.
2 **Investigate** the history of the chosen national symbol to understand its significance.
3 **Analyse** how well the national symbol contributes to a representation of Australia's modern national identity.
4 **Decide** whether the national symbol has a significant place in modern-day Australia.

National symbols:

- National anthem
- Australian flag
- Commonwealth Coat of Arms

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- National colours of green and gold
- Aboriginal flag and/or Torres Strait Islander flag
- National floral emblem, the golden wattle



▲ **Figure 9.15** A stamp printed in 1970 depicting the Golden Wattle

Digital resources

Visit the Interactive Textbook or Online Teaching Suite to access:

- General Capability Project
- Interactive chapter Quiz
- Interactive Scorcher Quiz
- Videos, image galleries and other extra materials.

SCORCHER

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Glossary

History

abbess female head in charge of a community of nuns in a convent or nunnery

abbot head of a monastery

absolute ruler ruler whose power and authority are never questioned

accuracy the analysis of a source to establish correctness by identifying purpose, corroborating the information with another source and assessing bias

analyse consider in detail for the purpose of finding meaning or relationships, and identifying patterns, similarities and differences

archipelago a group of islands

aristocrat member of nobility (like the Royal Family in Britain)

array clothing, armour and weapons

artefact an object that is made by a person, such as a tool or a decoration; it is usually of historical interest

artisan skilled worker who made things or provided services

Aztec Empire alliance of three great cities in the Valley of Mexico

bakufu (or shogunate) military government ruled by the shogun

barbarian member of a people not belonging to Rome

Bible collection of sacred writings of the Christian religion

brigand robber or bandit

Buddhism religion that has a variety of beliefs, practices and traditions based largely on the teachings of Siddhartha Gautama (the historical Buddha)

bushido Japanese warrior code of conduct

Byzantine Empire continuation of the Roman Empire in its eastern provinces during late antiquity and the Middle Ages

calpulli small Aztec neighbourhoods

cardinal leading dignitary of the Roman Catholic Church, nominated by the Pope

cathedral large church and place of worship, which was presided over by a bishop; usually in the centre of town to remind the townsfolk of the power of religion

causeway wide embankment or dyke constructed across marshes or shallow water

chivalry code of conduct that knights followed, including respect towards women

Christianity religion based on the person and teachings of Jesus Christ, its beliefs and practices; the dominant faith in medieval Europe

Christopher Columbus Italian explorer credited with 'discovering' the Americas

civil war war within a country between its people

clan group who originally came from the same family and have the same name

clergy ordained member of the Christian Church, such as a priest

colonisation act, by a militarily strong country, of invading and taking over of another area, which then becomes known as a colony

Confucianism religion based on the ideas of the Chinese philosopher Confucius

context the analysis of sources to understand the nature of society and the historical period the source is created, the significant event/s related to the source, and the language and ideas of the time

daimyo feudal Japanese lord, roughly equivalent to a medieval European duke or earl

deify to worship or regard as a god

demigod being who is partly human and partly a god

diplomacy practice of negotiating between representatives of different countries

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divine right the idea that kings derive their right to rule directly from God and do not have to answer to those below them

dynasties family lines of rulers

edict official order or proclamation issued by a person in authority

emperor ruler of an empire

evaluate examining and judging the merit or significance of something

evangelise convert or seek to convert (someone) to Christianity

excommunicate to be officially excluded from the Church and its sacraments

feudalism (or 'feudal system') a system of social exchange, where lords gave land to vassals in exchange for loyalty and service

fief parcel of land

flagellant person who whipped themselves as a form of self-punishment, hoping God would forgive their sins

florins a gold coin used in Florence, which became the most widely used form of currency throughout Medieval Europe

garments clothing

groom lower servant in the noble's castle

hacienda large estate of land

heathen non-Christian

heretic Christian who promoted religious opinions or teachings at odds with the official Church teachings

hiragana Japanese written alphabet used to spell out *kanji* in syllables

Holy Land region between the Jordan River and Mediterranean Sea, known today as Israel and Palestine, that includes the city of Jerusalem and is of central importance to Christianity, Judaism and Islam

hypothesis tentative argument based on the evidence available

idol image or an object that resembles a god

imperial related to an empire or emperor

industrialisation development of industries in a country or region on a wide scale

intermediary a person who acts as a link between two or more others to try to reach a satisfactory arrangement

isolationism policy of remaining apart from the affairs or interests of other groups, especially the political affairs of other countries

kami Shinto deities (spirits)

kamikaze 'divine wind', especially relating to the typhoon of 1281

kanji Japanese written alphabet that comes from Chinese characters

katakana Japanese written alphabet for words that have been adopted from other languages

lord, earl, duke and baron titles used by people from the nobility to determine their rank

magnate wealthy and influential business owners in society

maize corn, sweetcorn or 'corn on the cob', a cereal that originated in southern Mexico

manor land owned by a lord

Marco Polo Italian explorer who reached China and returned

marshal servant in charge of the noble's hall

merchant class new social group who bought and sold goods between East and West

Mesoamerica region in the Americas, extending approximately from central Mexico to Belize, Guatemala, El Salvador, Honduras, Nicaragua, and northern Costa Rica

Mexica indigenous people who lived in the Valley of Mexico and created the Aztec Empire

missionary person sent on a religious mission to promote Christianity

modernisation process of adapting something to modern needs or habits

monarchy country that has a royal family, and the head of the royal family as its ruler

monastery Christian community of religious people called monks or nuns, and the building where they lived and worked

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Mongols east Asian ethnic group native to Mongolia, who also live as minorities in other regions of China and Russia

monotheism belief in one god

moral authority guiding group who determine what is good and right

mortal deadly

mutual obligation social arrangement where two parties exchange goods or services for mutual benefit

Nahuatl language spoken by the Mexica

New World name given to the Americas by European explorers

nobility group of people who had greater privileges and rights than the majority

Noble Eightfold Path summary of the path of Buddhist practices leading to enlightenment

obsidian type of almost black rock that is like glass

oral history the recording of past events in a spoken form including through song, story or dance

origin analysis of a source to establish who created the source as well as where and when it was produced

patriarchy a system of society or government controlled by men

perspective the way we see something, a point of view or attitude to something

pilgrimage journey to a sacred place, undertaken by a person as an act of religious devotion

pious lives a devoutly religious life

pope head of the Roman Catholic Church

primary source a source of information about the past created in the time being studied

prophecy prediction of what will happen in the future

purpose analysis of a source to establish the original reason for its creation

Quetzalcoatl Aztec god of wind and air

relic either some part of the physical remains (a body part) of a saint, or the personal possessions of a saint, preserved and displayed in a church for the purpose of veneration

reliquary a container for relics, also called a shrine

Roman Catholic Church early strand of Christianity where the figurehead is based in Rome, Italy

ronin samurai without a master, a wandering warrior

rubber stamp to approve or endorse something

saltpeter salty-tasting white powder used to preserve meat, and also used in producing explosives and fertilisers

samurai hereditary warrior class of Japan

scuttling deliberate sinking or running aground of a ship, especially your own. By running a ship aground, there is always a chance of returning at a later to date to repair it.

secondary source a source of information about the past created after the time being studied

Seljuk Turks tribes that invaded south-western Asia in the eleventh century and eventually founded an empire that included Mesopotamia, Syria, Palestine and most of Iran

seppuku committing ritual suicide to keep a sense of honour – a samurai would painfully cut open their belly using their short sword while another samurai would quickly cut off their head ceremonially

serf worker who was obligated to work for a local noble. The most common type of serf was known as a *villein*. Villeins had more rights and higher status than the lowest serfs, but not as many rights as freemen, who were people higher in social rank than a serf, but not part of the nobility

Shinto Japanese religion in which people worship past members of their family and various gods that represent nature

shogun military general

siege military tactic that involves surrounding a city and cutting off supplies, until the inhabitants must surrender or starve

Silk Road trading route that linked China and the far east to Europe

smallpox extremely infectious disease that causes a fever, spots on the skin, and often death

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steward servant who supervised both the lord's estate and his household

subordinate of a lower status or position

subtenant person who received a fief from a tenant-in-chief

tenant-in-chief lord, such as a baron or church official, who received their fief directly from the monarch

Tenochtitlan capital city of the Aztec Empire, referred to as 'Mexico' by the conquistadors

the East the Islamic regions of the Middle East and North Africa

tithe one-10th of annual produce or earnings, paid as a tax for the support of the Church and clergy

Tonatiuh Aztec God of the Sun

Tramissene site of Christian crusades against Muslim armies in Algeria

treason crime of betraying or participating in a war against one's country or the state authority to who one owes allegiance, such as the king

Treaty of Tordesillas treaty made to divide the New World between the Spanish and Portuguese monarchies

trebuchet large device used in wars for throwing large rocks at the walls of a castle as part of an attack

trepanning (or trepanation) surgical procedure in which a hole is drilled into a person's skull

tribute form of tax paid to a ruler

typhoon geographical term to describe a mature tropical cyclone that develops in the northern hemisphere

tzompantli wooden rack used for the public display of human skulls, also a wall of skulls carved in stone

ullamaliztli ancient Aztec ball sport

usefulness the analysis of a source to determine how relevant it is in relation to historical questions

vassal in a feudal system, a holder of land or position granted by a superior in exchange for allegiance

wight medieval term for person

xocoatl Aztec chocolate drink

zealot person who is fanatical in their beliefs

Geography

aftershock one or more smaller tremors that follow the main shock of an earthquake

agents the forces causing erosion, such as gravity, wind or water

asylum seeker someone who leaves their own country, often for political reasons or because of war, and who travels to another country hoping that the government will protect them and allow them to live there

backwash water from a breaking wave running back down the beach

bathymetry the shape of the sea floor

biodiversity the number and types of plants and animals that exist in a particular area

birth rate the number of people born per year in a population per 1000 people

central business district (CBD) the main business and commercial centre of a city

citizenship the status of officially being a member of a country and having legal rights such as voting in elections

coastal deposition the process where an agent of erosion – wind or water – loses energy and deposits the rock fragments or sediment it is transporting

coastal erosion the wearing away of sediment and rocks from the shoreline

coastal hinterland the land extending inland from the coast

coastal waters the sea extending out from the coast

commute time the amount of time taken to travel to and from work

conservation the protection of the natural environment

constructive waves a wave where the swash is stronger than the backwash, depositing sediment and other materials on the beach

continental drift the theory that continents move relative to each other over time

continental plates the Earth's landmasses, 25–90 kilometres thick and made mostly from granite

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conurbation a city area containing a large number of people, formed by various towns growing and joining together

correlation an association or relationship between two phenomena

counter-urbanisation the movement of people from urban areas to surrounding rural areas

culture the customs, behaviours and beliefs that characterise a particular society

death rate the number of people who die per year in a population per 1000 people

deforestation the permanent clearing of a forest and use of the land for another purpose

delta a fan-shaped deposit of river sediments found at the mouth of a river

deposition the last stage of the erosion process, when the material being moved settles on a surface

depositional coastal landscape sandy coastlines with landforms created from sediment being deposited

destructive waves a wave where the backwash is stronger than the swash, removing sediment and other material from the beach

detached house a house that stands alone and is not joined to any other house

disaster a hazard event that causes significant damage to human or natural environments

donor country a country from which an international emigrant came

dredging clearing up materials from water

dual occupancy a type of development where two dwellings are built on a single block of land

emigrant a migrant who leaves a country to live in a different country

epicentre the point on the Earth's surface directly above the earthquake's focus

erosional coastal landscape rocky coastlines with landforms shaped by erosion

exporting sending goods to another country for sale

fault a crack or fracture in rock

fetch the distance covered by wind that generates a wave

financial incentive money that is offered to people to encourage them to do something such as migrate

fissure long, thin crack

focus the point in the Earth's crust where an earthquake originates

fold mountains mountains created by the crumpling of the Earth's surface where two tectonic plates are colliding

food insecurity unreliable access to a sufficient amount of affordable and nutritious food

forestry the science and practice of planting and taking care of forests

geographic characteristics physical and human features of a landscape or environment such as landforms, terrain, vegetation, climate, architecture and infrastructure

geographic information system a digital tool used to collect and analyse spatial data using layers on an interactive map

geomorphological physical and chemical interactions between Earth's surface and environmental processes which produce or shape landforms.

geomorphological hazards/disasters natural hazards or disasters that affect the characteristics of the Earth's surface

geotagged photo a photo that contains information about where it was taken, such as latitude, longitude and elevation

gorge a valley, cleft or deep vertical indentation between cliffs

gross domestic product (GDP) per capita a measure of the strength of a country's economy per person

groundwater water located below the Earth's surface

groyne a low wall built out from the coast into the sea, to prevent the repeated movement of the waves from removing parts of the land

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hazard a situation that has the potential to cause harm to people, their property or the natural environment

hazard event the realisation of a hazard, such as the eruption of a volcano

host country a country that is home to an international immigrant

hotspot area of volcanic activity away from the boundaries of tectonic plates

hukou an official document registering that a Chinese citizen is a legal resident of a particular area

immigrant a migrant who comes to live in a different country

industrialisation the shift of a country's economy from one based primarily on agriculture to one based on manufacturing

infrastructure structures and services needed for society to operate properly, such as transport, water supply, health services, education systems, waste disposal systems and telecommunications

integration the adoption of other cultures into a society as equals

interconnection the relationship between different features and how they are connected to each other (this can include the relationship between places and people, and the influences that these have on each other)

landfill the disposal of waste by burying it in the ground

landform a naturally formed feature on the Earth's surface, having a characteristic shape or form

landscape the visible features of an area including both the natural (mountains, forests, rivers etc.) and human (roads, houses, bridges etc.) elements

landscape degradation the changing of a landscape in an undesirable way

longshore drift the movement of sediment, usually sand, shingle or mud, along a coastline driven by the direction of the prevailing wind

megacity a very large city with a population of over 10 million people

meteorologist scientist who study and predict atmospheric conditions

mid-ocean ridges underwater mountain chains created by the pressure from rising magma where two oceanic plates are diverging

natural aquifer an underground layer of rock and other material containing groundwater

natural hazards/disasters hazards or disasters caused by nature or natural events

natural population growth the difference between the numbers of people who are born and who die in a population

natural resources any part of the natural environment

net overseas migration the difference between the numbers of immigrants and emigrants in a country

oceanic plates the ocean floor, 5–10 kilometres thick and made mostly from basalt

oceanic trench a long, deep underwater chasm created where an oceanic plate subducts under a continental plate, forming the deepest parts of the oceans

permanent residency having the right to live in a country for as long as you like without being a citizen

persecution to treat someone unfairly or cruelly over a long period of time because of their race, religion or political beliefs

place an area that has a specific meaning or purpose

plantation a farm or estate where selected crops are grown

plate tectonics the theory that the Earth's land masses are in constant motion

population density the amount of people per square kilometre

population the amount of people living in an area

precipitation the preferred scientific term used to describe the rain, snow, sleet or hail that falls to or condenses on the ground

prevailing winds the usual direction the wind blows in a particular location

primary data information collected in the field by the person undertaking research

processes the physical or human forces that cause change to a landscape

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refugee a person who has escaped from their own country for political, religious or economic reasons or because of a war

relative location description of where a place or object is in terms of distance and direction from another object

relocation scholarship payments for each year of study for students from regional and remote areas who undertake full-time study

remittance money sent back to family in the migrant worker's home country

rent assistance payments to contribute towards rent expenses for those living away from home

resettlement the transfer of refugees from the country in which they have sought refuge to another country that has agreed to have them

Richter scale the scale used to measure the magnitude of an earthquake

rift valleys long valleys created where two continental plates are diverging

rural–urban fringe the border between rural and urban environments on the outskirts of a city

salinisation the build-up of salts at or near the soil surface, either by natural processes, such as evaporation, or by land clearing

sanitation access to clean drinking water and adequate sewage disposal

satellite cities smaller cities or towns that are next to major cities

satellite imagery images taken by satellites orbiting the Earth

secondary data information collected from research such as studies, statistics and satellite imagery

sediment the fragmented material created by weathering and erosion, such as sand or dust

seismic waves vibrations of the Earth's crust that cause earthquakes

slums dense informal settlements in urban areas where residents do not have a legal claim to their land

social security payments from the government to people without an income, such as Australia's aged pension

spatial association the degree to which two or more phenomena have similar spatial distributions

spatial scale the size or magnitude of a geographic process, feature or event

storm surge a rush of water onshore caused by strong winds pushing on the ocean's surface

subdivision the division of a block of land into smaller pieces for development

subduction where two tectonic plates are colliding and an oceanic plate is forced under another plate into the magma of the mantle

sustainability the capacity of a landscape to be maintained for, and used by, future generations

sustainable the ability to be maintained at the same rate without impacting the future

swash water from a breaking wave washing up the beach

technological hazards/disasters hazards or disasters caused by the actions of humans

time scale the period of time over which a geographic process or change has taken place

tombolo a landform where a narrow piece of land connects an island to the mainland

urban relating to a large town or city

urban concentration the proportion of a country's population living in large cities

urbanisation the increase in the proportion of people living in urban areas compared to rural areas

valley an area of low land between hills or mountains

viscosity the resistance to flow, of a fluid

weathering the process where a material is broken down into smaller fragments, either physically or chemically

working class people working in labour or industrial work, often for lower wages

youth allowance fortnightly payments available through Centrelink for full-time students aged between 16 and 24

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yurt a round tent-like shelter that can be assembled in under an hour to allow for easy movement of nomadic herders across the grasslands several times a year. It is loaded onto a cart when not assembled.

Economics & Business

attribute personality trait

body language the movements or positions by which you show other people your feelings without using words

budget a financial plan listing expected expenses and income during a particular period

circular economy an economic system aimed at eliminating waste and the continual use of resources

communication the process of sharing information, especially when this increases understanding between people or groups

competitive advantage the conditions that make a business more successful than the businesses it is competing with, or a particular quality that makes it more successful

corporate social responsibility business practices that are ethical and socially responsible

customer retention the ability of a business to keep customers for a period of time

customer satisfaction a measure of how happy customers feel when they do business with a company

direct taxation a tax that is paid by the person or business to the Australian Taxation Office (ATO)

enterprise the knowledge and skills used by owners of businesses and managers to coordinate the production process of goods and services

entrepreneur a person who operates, organises and assumes the risk of a new business

financial objectives a financial result an individual or a business plans to achieve within a time frame

globalisation the increase and simplification of trade around the world, especially by large companies producing and trading goods in many different countries

goal a purpose or aim that a person or business wants to achieve

gross income refers to the total income before tax deductions are included

indirect taxation tax that can be passed on to others by the person or firm on whom it is levied, for example, goods and services tax (GST)

innovation the development of a new idea or product

long-term financial goal is an objective which the business believes will take longer than one year to complete

market the term used to describe the physical or virtual place where goods and services are bought and sold

market share the number of products or services that a company sells compared to the number of the same product or service sold by other companies

marketing mix the combination of actions a company uses when selling a product or service; often described as the four Ps (product, price, place and promotion)

mission statement a short written description of the aims of a business, charity, government department, or public organisation

multinational corporations companies that are located in several different countries, or businesses producing and selling goods in several different countries

net income refers to the income you receive after tax has been paid to the government

objective an action that a business plans to do to achieve a goal within a time frame

personal income refers to funds that are earned by an individual and are received by them in the form of salary, wages or shares of a profit a business makes or return on investment

professional dress wearing appropriate clothes for a business setting to present a professional image

progressive taxation a system in which the percentage of tax paid increases as individuals' income level increase

reputation the opinion that customers in general have about a business based on their past dealings with the company and the quality of the product and/or service the business sells

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resources describe the goods and services that a company uses to maintain their operations

salary paid on an annual basis in regular amounts (e.g. fortnightly or monthly) and is unrelated to the amount of hours worked or age of the worker

savings the remainder of your income once expenses have been subtracted

short-term financial goal an objective which the business aims to complete within one year

skill a particular ability developed through training and experience that is useful in a job

start-up company a new business in its initial stages of operation that is developing a product or service that is new and innovative

subsidiary a company that is owned by a larger company

sustainability report a report on the financial, environmental and social performance of large businesses

tariff a tax on goods coming into a country (imports)

tax brackets categories which link a range of personal income to the level of income tax each person has to pay to the government.

wage usually paid at an hourly rate and determined by the age of the person working

Civics & Citizenship

Act of Parliament what a law is called when it has passed through Parliament successfully

active citizenship refers to participation in one's community and displaying behaviours which are respectful, inclusive and others-focused

advocate to publicly support a specific cause or policy

balance of power in a minority government this is a position held by a minor party or an independent whereby their vote is necessary for a bill or motion to be passed. In a majority government, the governing party holds the balance of power

bicameral system when there are two parliamentary chambers (houses) that laws must pass through

bill a draft of a proposed law that is introduced to Parliament

civil law an area of law that sets out the rights and responsibilities of how parties, such as individuals, government or private organisations, interact with each other

coalition when two or more political parties unite to increase their chances at forming government

collective identity where a group shares defining characteristics based on its members' common experiences, interests and/or culture

common law law that is made by judges through decisions by earlier courts and an understanding of the present situation

criminal law an area of law that deems certain actions punishable, defines criminal acts and provides guidelines on sentencing offenders of these acts

customary law legal systems and practices uniquely belonging to Indigenous Australians

direct action when individuals directly engage with issues that they seek to change

election a formal process in which citizens of an electorate vote for a Member of Parliament to represent their interests, values and priorities. An election also results in a leader to represent the country or a particular state/territory

electorate a geographic area whose population a member of parliament is elected to represent. An electorate is also known as a 'seat' because a Member of Parliament has a seat in the parliamentary chamber

executive law legislation that is made under the direction of an Act of Parliament by the executive branch of government, after it is passed through Parliament

global citizenship the act of engaging in and understanding social, environmental and economic issues affecting people worldwide

governance the way in which a country, entity or organisation is directed, controlled and operated, particularly in regard to structure and decision-making

hung parliament a post-election situation in which no political party has secured enough seats to become the governing party

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independent a political candidate who does not belong to a political party

Justice of the Peace (JP) a community member who acts as an independent, impartial witness to official or legal documents (e.g., oaths or affidavits, statutory declarations, affirmations, signatures, document execution and original document certification)

legal citizenship is legally belonging to a country and receiving specific rights to live, work and engage in the country's political processes

legal system a process, including the individuals and organisations involved in this process, by which laws are made, interpreted and enforced in a country

liberal democracy a system of government which promotes the rights of individuals and groups with regard to political, legal and social representation

lobby group a group of individuals who seek to influence government decisions and policies through direct correspondence

member of parliament a person who has been formally elected, by way of voting, to represent the citizens of an electorate

minority government a way of resolving a hung parliament whereby the leading party who does not have enough seats to govern must form an alliance with minor parties to win support

national identity a sense of belonging a person has to their nation and to the perception of a nation as a cohesive, unified whole

opposition the party or coalition that has the second-greatest number of seats in the House of Representatives and plays a critical role in developing a party platform that is different to the Government's. They will often disagree with Government decisions and policies

parliamentary majority a situation when a party or coalition has the greatest number of seats in the House of Representatives and is therefore able to form government

party discipline the control that party leaders have over their Members of Parliament

party platform the values, beliefs and ideas that the political party supports

personal identity a person's understanding and expression of their individuality

political party an organisation that represents a particular group of people or a set of attitudes, values, ideas and beliefs, and aims to have its members elected to Parliament

popular culture generally refers to a set of practices, ideas and products that embody the broad tastes of society

pressure group a group of individuals who indirectly influence government actions and priorities by promoting a particular cause, agenda or ideology

public inquiry when members of the public are consulted and exposed to government policy matters. Public hearings allow for feedback on a draft policy report

public meeting when members of the public can meet to discuss or share information about an issue or proposal

referendum a specific type of vote for the purpose of amending the Australian Constitution

representative democracy a system of government whereby citizens choose individuals (known as representatives) to make decisions on their behalf

representatives a person who acts on behalf of citizens, as chosen by the individuals through a process of voting

statutory law a type of law that is enacted by being passed by parliament

system of government the way that power and governance is distributed within a country's political system

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UNIT

2

Early exploration: expanding contacts: discovery and exploration



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◄ **Source 2B** Marco Polo (1254–1324) was an explorer from Venice, Italy, whose voyages to and experiences in Asia became known through the recorded tales of *The Travels of Marco Polo*. In this artwork from the fifteenth century, Marco Polo is depicted setting out from Venice by boat with his father and uncle in 1271, heading for the court of Kublai Khan in Mongolia.

Overview

What do you think has had the biggest impact on modern society … the iPhone? The internet? People landing on the moon? The Middle Ages are full of discoveries and explorers who had a much bigger impact than any of these. This period will excite the explorer and inventor in you as you learn about world-shaking discoveries and earth-shattering inventions.

This chapter explores the impact of the Spanish conquest of the Americas. You will investigate ways of life, how discoveries changed and challenged customs and beliefs, and the impact of exploration on different groups. As you study this topic, think about the significance of the discoveries, and the perspectives of people in this period.

Learning goals

After completing this unit, you should be able to answer these questions:

- How did societies change from the end of the ancient period to the beginning of the modern age?
- What key beliefs and values emerged, and how did they influence societies?
- What were the causes and effects of contact between societies in this period?
- What were the perspectives of people from the time?
- Which significant people, groups and ideas from this period have influenced and shaped the world today?
- How and why have historians interpreted this period differently?

◄ **Source 2A** This modern painting depicts Aztec warriors in battle against Spanish conquistadors on 'The Night of Sorrows' in Tenochtitlan in 1520.

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CHAPTER 2: The Spanish conquest of the Americas (c.1492–c.1572): how did the arrival of the Spanish from 1492 change the Americas and the wider world?

Setting the scene: a clash of cultures



▲ **Source 2.1** Poster from the 1953 movie *The War of the Worlds*

Imagine waking up this morning to the news that inter-galactic aliens had landed in South Australia and were moving north towards the southern border of Queensland. Early reports suggest that they look different to us in appearance and that they are equipped with technology we do not understand. No other information is available at this stage.

ACTIVITY 2.1
MAKING THINKING VISIBLE

Think, pair, share

1 What do you *think* and feel about the prospect of these aliens soon arriving in your location? Take two minutes to write down some ideas.
2 *Pair* and share your thoughts with a partner.
3 *Share* responses around the class. What are the different ways to think about this?

Orson Welles adapted HG Wells's science fiction story *The War of the Worlds* as a radio play. You can listen to the original first episode by searching online for 'War of the Worlds, Radio Broadcast 1938'.

When it was first broadcast in 1938 in the United States, it caused some alarm.

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In the Interactive Textbook, you can access a commentary from Orson Welles himself, on the reaction of some Americans in 1938, as well as some interviews of telephone operators who were working during the broadcast in 1938.


DAILY NEWS FINAL

FAKE RADIO 'WAR' STIRS TERROR THROUGH U.S.

"War" Victim

"I Didn't Know"

▲ **Source 2.2** The front page of the *New York Daily News* on 31 October 1938

ACTIVITY 2.2
MAKING THINKING VISIBLE

Think, pair, wonder

1 What do you *think* and see in the reactions from Americans in 1938?
2 How do those reactions compare with your thoughts and feelings from Activity 2.1?
3 *Pair* and share your new thoughts with a partner.
4 What does the prospect of an 'alien invasion' in Australia make you *wonder* about European explorers arriving in foreign lands in the past?

THINKING DEEPER

As a class, discuss how the arrival of British colonists in Australia might have been perceived by First Nations peoples, and research accounts of their reactions.

ACTIVITY 2.3
MAKING THINKING VISIBLE

Step inside: perceive, know about, care about

Now, change your perspective. Imagine you are one of the inter-galactic aliens that has just landed in Australia.

1 Write a short letter to your alien leader listing your initial observations of the human beings you have encountered in Australia.
2 Include what you can see, what this makes you think about them and what is very important for your leader to know.
3 Share some of your letters with the class. **Discuss** similarities and differences in the various perspectives.

While viewing Source 2.2 you focused on the historical concept of *perspective*. It is difficult for us to imagine what the world was like for people who lived in the past, just as it was difficult for you to imagine what an inter-galactic alien would think upon arriving in Australia today. However, it is very important that we try to understand the various settings and circumstances that shaped people's lives and actions in the past. It is equally important to seek out different perspectives on various events. For example, you have just attempted to understand two perspectives on an alien landing in Australia: yours and the aliens. As we study this depth study, we will continue to seek out different perspectives and you might even find some similarities between our 'alien landing' activities and what happened when the Spanish came to the Americas, beginning in 1492.

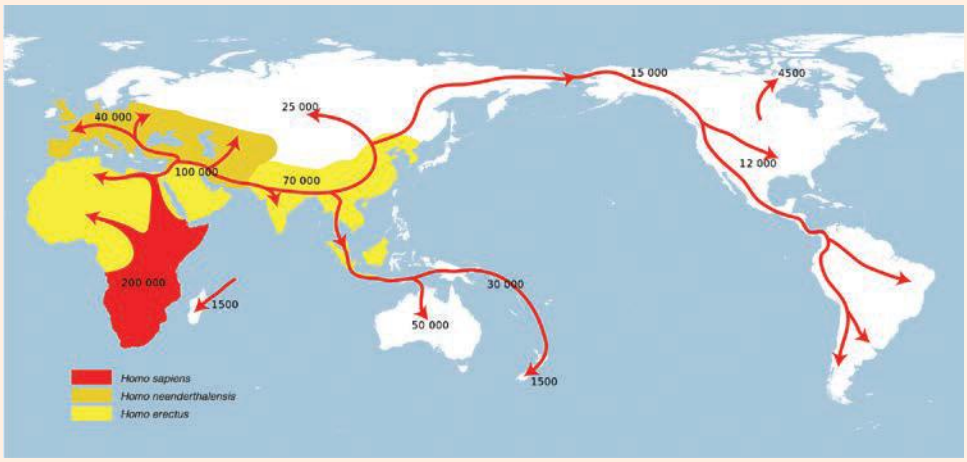
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Chapter overview

Introduction

The history of the Spanish conquest of the Americas (1492–1572) is the history of an alien landing in another part of our Earth. This time, both the aliens and the indigenous people belonged to the same species – *Homo sapiens* – but they had developed very different ways of living over thousands of years. The subject of our study in this chapter is what happened when these cultures collided.



▲ **Source 2.3** A world map showing one theory about migration patterns of humans spanning more than 100 000 years. Red arrows show migration of *Homo sapiens*, with timelines in number of years ago.

Humans migrated to the Americas from Eurasia (the largest continental area on Earth, comprising all of Europe and Asia) possibly as far back as 40 000 years ago, but certainly by 15 000 years ago. While some of these early migrants settled in North America creating a vast network of tribes, many others moved south into the regions of Central and South America, laying the foundations for three great civilisations: the Maya, Inca and Aztec. The Maya civilisation did not survive to see the arrival of Europeans in the fifteenth century, while the Aztec Empire of modern-day Mexico and the Inca of Peru would not survive the Spanish conquests they experienced.

We study the Spanish conquest of the Americas to understand the causes and effects of colliding civilisations and the resulting changes.



▲ **Source 2.4** A map showing the location of the Maya, Aztec and Incan Empires

Largely motivated by the triple Gs (God, glory and gold), the Spanish impacted the indigenous Americans most significantly by introducing new diseases and new weapons, resulting in the death of many indigenous people of the time. For the Europeans, it brought a new world of wealth, resources (including new crops like maize, beans, potatoes, tobacco and chocolate), fame and new territory for the spread of Christianity around the globe.

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Key inquiry question

'How did the arrival of the Spanish from 1492 change the Americas and the wider world?'

Every key inquiry question should have:

- An open interrogative
- A historical concept
- Specific content
- Scope and scale.

So, let's dissect this key inquiry question: 'How did the arrival of the Spanish from 1492 change the Americas and the wider world?'

To answer a key inquiry question in a historical investigation, it is helpful to break the question into sub-inquiry questions.

Sub-inquiry questions

To help you investigate the key inquiry question, this chapter is structured around the following sub-questions:

- What was life like for the Taíno peoples of the Caribbean before Europeans arrived?
- What was the nature of the interaction between Columbus and the Taíno people he encountered?
- How should we remember Christopher Columbus?
- How did Columbus change the course of life in the Americas?
- What was life like for the Aztecs before Europeans arrived?
- What was the nature of the interaction between the Spanish and the Aztecs?
- How should we remember Hernán Cortés?
- How did Cortés change the course of life in the Americas?

Historical skills

After completing this chapter, you should be able to:

- **Identify** the origin, content, context and purpose of primary and secondary sources
- **Identify** and **describe** the accuracy and usefulness of primary and secondary sources as evidence
- **Describe** causes and effects and explain continuities and changes
- **Identify** perspectives, attitudes and values of the past in sources
- **Explain** historical interpretations about significant events, individuals and groups
- **Create** descriptions, explanations and historical arguments, using historical knowledge, concepts and terms that reference evidence from sources.



▲ **Source 2.5** An artist's impression of Christopher Columbus arriving in the Americas in 1492



THINKING DEEPER

Whose perspective do you think is shown in Source 2.5?

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Timeline of key events

What came before this topic?

38 000–13 000 BCE (approximately)
Humans begin to migrate from Eurasia into North America at the end of the Ice Age

- 1250 CE The Mexica people arrive in the Valley of Mexico
- 1300 CE The Taíno people begin to occupy the islands in the Caribbean Sea
- 1345–1521 CE Aztec society begins to emerge in Mexico
- 1345 CE The city of Tenochtitlan is formed
- 1427 CE The Sun Stone that explains Aztec society is created
- 1428 CE The Triple Alliance is formed between Tenochtitlan, Texcoco and Tlacopan, creating the Aztec Empire



▲ A reconstruction of a Taíno village in Cuba



► Hernán Cortés (1485–1547)



► Engraving of Hernán Cortés and Moctezuma II

1492
Christopher Columbus encounters the 'New World'

1494
The Treaty of Tordesillas divides the Americas between Spain and Portugal

1502–1520
Moctezuma II is Emperor of the Aztecs

1504
Hernán Cortés sails to Haiti to make a new life

1506
The Spanish conquer Cuba

1519
Cortés leads an expedition to Mexico

15 March 1519
The slave La Malinche is given to Cortés as a tribute by local Mexican nobles

September 1519
Cortés and his Spanish conquistadors battle the Tlaxcala and form an alliance after defeating them

October 1519
Cortés's Spanish conquistadors and the Tlaxcalan forces massacre 3000 in the city of Cholula

15 November 1519
Cortés and the Spanish conquistadors enter Tenochtitlan

18 November 1519
Moctezuma II is taken hostage by Cortés



▲ Moctezuma II, ruler of Tenochtitlan from 1502 to 1520



▲ La Malinche (c.1496–1529), Nahua woman, interpreter for the Spanish conqueror Hernán Cortés

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What came after this topic?

- The Spanish conquest had a large impact on the populations of the Americas. Indigenous populations were decimated by conflict and disease, and suppression of their languages, histories and cultures.
- Spanish became the main spoken language in Central and South America, and still is today. Christianity became the main religion throughout the Americas, and still is today.



▲ The Mexico City Cathedral was built between 1573 and 1812. Construction began shortly after the end of the Aztec Empire.

24 June 1520
The city of Tenochtitlan revolts against the Spanish conquistadors

29–30 June 1520
Moctezuma II dies and the Spanish are driven from Tenochtitlan

1520
Smallpox outbreak killed millions across Mexico

22 May 1521
Cortés returns to Tenochtitlan and lays siege to the city

13 August 1521
Tenochtitlan captured by the Spanish and destroyed, bringing the Aztec Empire to an end

1521
The Spanish begin to rebuild Tenochtitlan, naming it Mexico City, the capital of New Spain

1522
Cuauhtémoc is executed by the Spanish

1542
New laws enacted by the King of Spain to protect the indigenous peoples from slavery and exploitation

1547
The conquest of the entire Aztec Empire is complete

1560
The *encomienda* system is finally abolished

1590
Approximately 900 Christian churches have been built in Mexico

Responding to the timeline

1 **Reflect on** the events prior to the Spanish arrival in Mexico in 1519. **Explain** what this tells you about the Aztec Empire.
2 **Examine** the frequency of events between 1519 and 1521. **Explain** what this tells you about the impact the Spanish arrival had on the Aztecs.
3 After reading the section 'What came after this topic?', **consider** which consequences of the Spanish conquest could be seen as intended by the Spanish and which were simply accidental.

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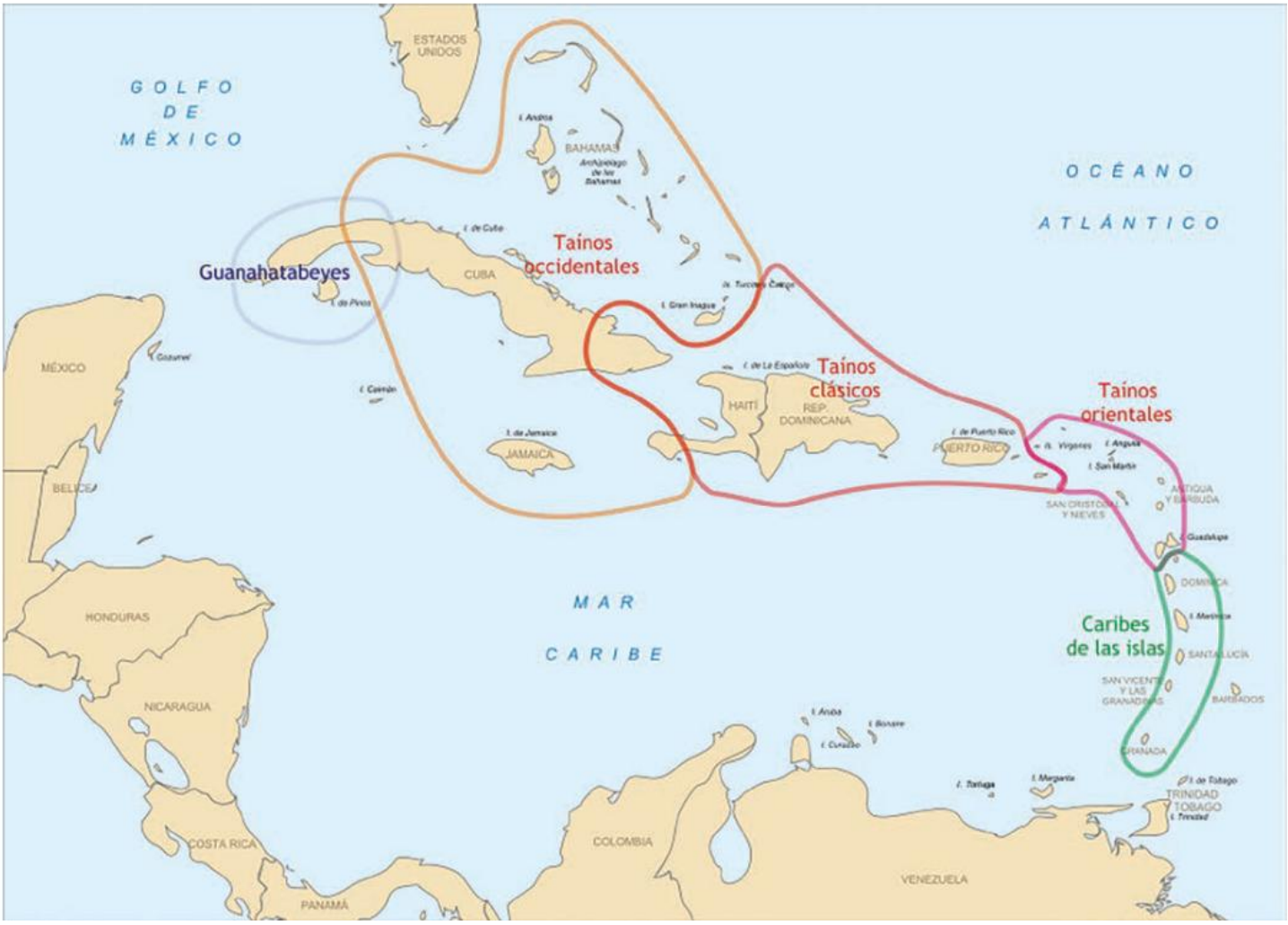
2.1 What was life like for the Taíno peoples of the Caribbean before Europeans arrived?

FOCUS QUESTIONS

- What do we know about the Taíno people?
- What kind of life did the Taíno people lead before the arrival of the Spanish?

The Taíno

The Taíno were an indigenous people of the Caribbean region who interacted with Christopher Columbus, the first European explorer to travel to that part of the Americas.



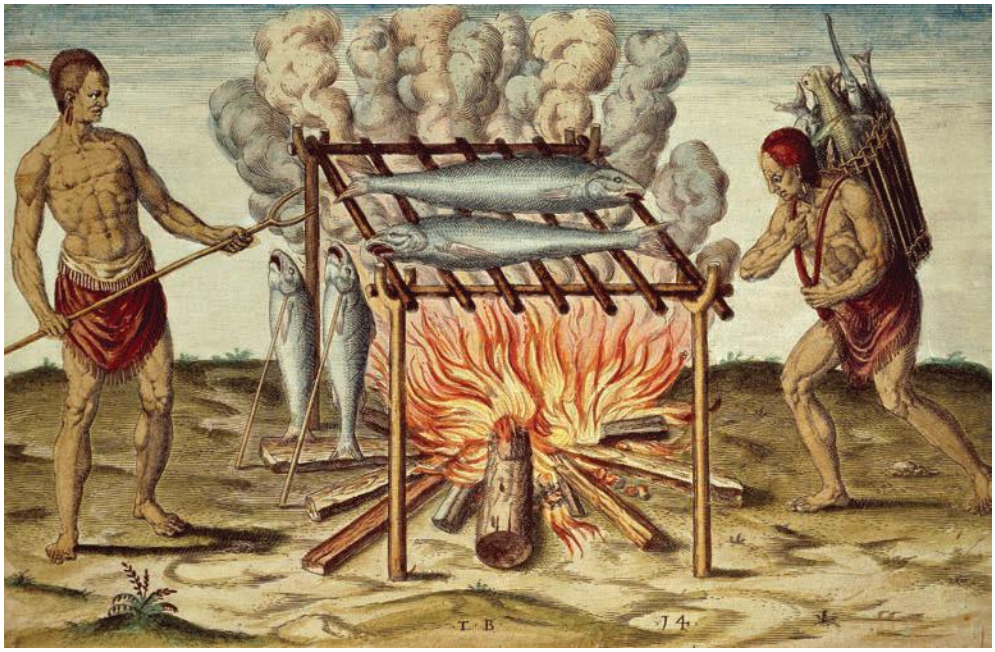
▲ **Source 2.6** This map shows the different groups of indigenous people who occupied the Caribbean islands prior to the arrival of Europeans.

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ACTIVITY 2.4
MAKING THINKING VISIBLE

Same and different

1 **Reflect on** Sources 2.7 and 2.8 and write down the similarities and differences in the way they depict the Taíno people.
2 What is different about the two perspectives?
3 Whose perspective is missing? What can be said about that missing perspective?
4 Write a short description of the Taíno people that you believe can be supported by the evidence.



▲ **Source 2.7** This is a colour engraving by Theodor de Bry (1528–1598) based on a painting by John White, from A brief and true report of the new found land of Virginia, 1585–1588. It depicts Taino men cooking fish.

The people of this island and of all the other islands which I have found and of which I have information, all go naked. They have no iron or steel or weapons, nor are they fitted to use them. They have no other arms than spears made of canes to the ends of which they fix a small sharpened stick. Of these they do not dare to make use, for many times it has happened that I have sent ashore two or three men to some town to have speech with them, and countless people have come out to them, and as soon as they have seen my men approaching, they have fled, a father not even waiting for his son.

But so they are, incurably timid. It is true that, after they have been reassured and have lost this fear, they are so guileless and so generous with all that they possess, that no one would believe it who has not seen it. They refuse nothing that they possess, if it be asked of them; on the contrary, they invite anyone to share it and display as much love as if they would give their hearts. They are content with whatever trifle of whatever kind that may be given to them, whether it be of value or valueless.

▲ **Source 2.8** Description of the Taíno people taken from a letter Christopher Columbus wrote to King Ferdinand of Spain describing the results of his first voyage

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ACTIVITY 2.5

Cognitive spotlight: analysing

To analyse a source in Year 8 History, you will be expected to **identify** and **examine** the origin, content, context and purpose of the source.

The *origin* of a source refers to where a source came from and who created it.

The *content* of a source is what it says about a particular issue, event or person.

The *context* of a source refers to when and where it was created.

The *purpose* of a source refers to why the author created it (motive) and who it was intended for (audience).

Analyse Sources 2.7 and 2.8 for origin, context and purpose. **Create** a table to help you do this. (Note: You have already analysed the content in Activity 2.4)

Discuss with your class. Does your analysis change the way you view the sources?

REFLECTING ON YOUR LEARNING 2.1

Reflect on what you have learned in this section:

1. Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the questions: 'What do we know about the Taíno people?' and 'What kind of life did the Taíno people lead before the arrival of the Spanish?'
2. **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'How did the arrival of the Spanish from 1492 change the Americas and the wider world?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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2

2.2 What was the nature of the interaction between Columbus and the indigenous people he encountered, and how did the Columbus expeditions change the course of life in the Americas?

FOCUS QUESTIONS

- Why did Europeans begin exploring further in the fifteenth century?
- What happened when Columbus arrived in the Americas in 1492?
- What consequences (effects) flowed from the Columbus expeditions?

Why did Europeans begin exploring further in the fifteenth century?

In the fifteenth century, European nations were looking to expand their power and wealth. They knew that great resources could be found in the far east of India and the 'spice islands' of Asia, but these were extremely difficult to reach over land. As early as the thirteenth century, Italian explorer **Marco Polo** had travelled across land to China and returned. The journey took three years in each direction.

Years later, in 1492, another Italian explorer **Christopher Columbus**, sponsored by the Spanish King and Queen, would set sail to explore a faster ocean route to Asia by heading west across the Atlantic Ocean.

Nordic explorers are known to have made contact with the '**New World**' ('new' to the Europeans), and there are theories of African and Phoenician contact, before Columbus. The truth is that Columbus found it by accident. He thought he had found a route to Asia and India, but actually the islands he found with his three ships, *Nina*, *Pinta* and *Santa Maria*, were in the modern-day Bahamas. This is how the Caribbean region came to be sometimes known as 'The West Indies' and its inhabitants as 'Indians'.

Marco Polo Italian explorer who reached China and returned

Christopher Columbus Italian explorer credited with 'discovering' the Americas

New World name given to the Americas by European explorers



► **Source 2.9** Engraving by Theodore de Bry of Christopher Columbus landing on American soil and being met by the indigenous population, c.1590

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ACTIVITY 2.6
RESPONDING TO THE SOURCE

When you consider whether a source is accurate and/or provides useful evidence for an investigation, you should look to see whether other sources agree or disagree.

Corroboration means that a number of sources *agree* on a particular issue, and this tends to strengthen your argument and/or create a greater sense of certainty.

Contradiction means that a number of sources *disagree* on a particular issue, and this tends to lead to greater uncertainty about a particular issue.

1 Historians sometimes condense the motives of Spanish explorers (including Columbus) down to 'gold, glory and gospel'. **Identify** the evidence you can see in this engraving (Source 2.9) to support that conclusion.

2 **Consider** whether the image in Source 2.9 corroborates or contradicts the evidence in the letter written by Columbus in Source 2.8.

THINKING DEEPER
HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Contestability.

Your response should contain:

- A clear identification of the interpretations of the past
- An assessment of the degree of corroboration or contestability between interpretations
- Evidence from the sources that illustrates the historical interpretations
- A judgement about which of the differing interpretations is best supported by evidence.

What happened when Columbus arrived in the Americas in 1492?

On 12 October 1492, Columbus landed on an island in what we now call the Bahamas. Source 2.10 outlines what Columbus wrote in his ship's journal for the first few days.

Friday 12 Oct 1492

In order that they might feel great friendship toward us, because I knew that they were a people to be delivered and converted to our holy faith by love rather than by force, I gave to some of them some red caps and some glass beads, which they hung around their necks, and many other things of little value. At this they were greatly pleased and became so entirely our friends that it was a wonder to see.

Saturday 13 Oct 1492

As soon as day broke, there came to the shore many of these men, all youths … They came to the ship in boats … And I was attentive and laboured to know if they had gold, and I saw that some of them wore a small piece hanging from a hole which they have in the nose, and from signs I was able to understand that, going to the south or going round the island to the south, there was a king who had large vessels of it and possessed much gold.

… I decided to go to the southwest, to seek the gold and precious stones ... The people also are very gentle and, … all that they do possess, they give for anything

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which is given to them, so that they exchange things even for pieces of broken dishes and bits of broken glass cups ...

Monday, 15 October 1492

[landing on another island] ... I anchored to learn if there were gold there, because those … on the [first] island … told me that there they wore very large golden bracelets on the legs and arms. I can well believe that all that they said was a ruse [a trick] in order to get away …

▲ **Source 2.10** *The Journal of Christopher Columbus (during his first voyage, 1492–93) and documents relating the voyages of John Cabot and Gaspar Corte Real,* 1893

ACTIVITY 2.7
RESPONDING TO THE SOURCE

1 Based on the evidence in the extracts in Source 2.10 from his journal, **identify** what was Columbus's main motivation.
2 Do you think he expected to be able to obtain what he wanted easily?
3 **Discuss** your responses with a partner and then share your collected thoughts with the class, making sure you quote specific pieces of evidence to support your view.

After about three months of exploration, Columbus returned to Spain with some of the Taíno people, parrots, gold trinkets and other exotic items, which caused a lot of excitement among the Spanish people. King Ferdinand and Queen Isabella were particularly impressed and provided Columbus with 17 ships, at least 1200 men, cannons, crossbows, guns, cavalry and attack dogs for a second voyage.

When he returned in 1493, Columbus demanded food, gold and anything else the Taíno had that they wanted. To ensure cooperation, Columbus used punishment by example, such as cutting off the ears or nose of an indigenous person if they committed any offence. This was meant to ensure all the indigenous people did what the Spanish wanted them to do.

Local resistance took many forms, from simply migrating away from areas near Spanish settlements to actively fighting against the Spanish. However, their sticks and stones were no match for the Spanish swords, guns and cannons.

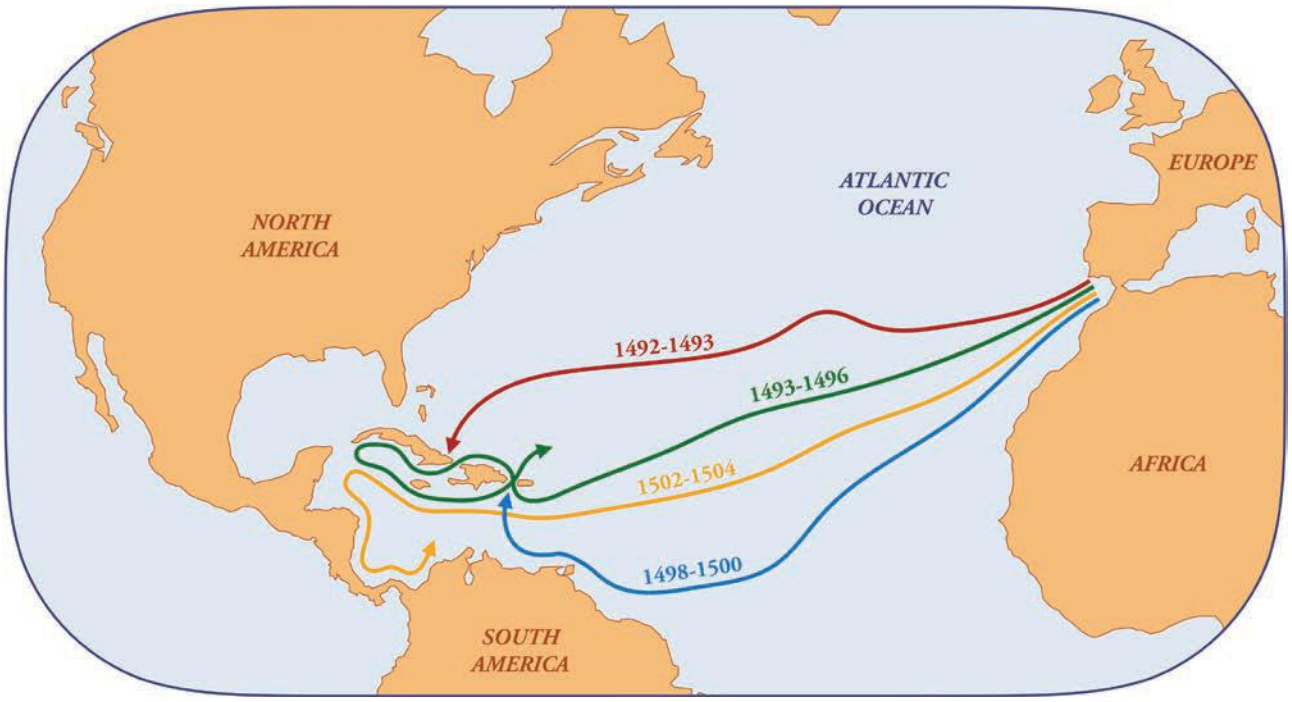
Not finding the fields of gold he had hoped for, Columbus began to take indigenous people as slaves. Some served Spaniards staying on the islands while others were sent back to Spain to be sold there.

In the space of five years, the combination of brutality, warfare and European diseases killed about two-thirds of the population of the islands in the region occupied by Columbus and the Spanish settlers.

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When the Spanish authorities learned how bad the situation had become, Columbus was summoned home in 1496.

Columbus made two further voyages of exploration around the Caribbean, touching on the central American mainland, but he never set foot on the North American continent. His reputation never fully recovered from his actions during his second voyage, and he died in Spain in 1506.



▲ **Source 2.11** Columbus made four voyages to the Americas, but never set foot on the North American continent. Why do you think Columbus was so keen to return so many times?

How should we remember Christopher Columbus?

On 24 March 1495, therefore, Columbus marched forth in warlike array to rout his enemies. The rebel natives had assembled more than one hundred thousand Indians, while the Admiral had only two hundred Christians, twenty horses, and as many attack dogs.

First the infantry squadrons of the two divisions attacked the Indians and began to rout them with crossbow and gun shots, then the cavalry and hounds attacked them. As a result those cowardly Indians fled in all directions, hotly pursued by our men, who with God's aid soon gained a complete victory, killing many Indians and capturing others.

This victory and the imprisonment of those men so improved the position of the Christians that though they numbered only six hundred and thirty, most of them sick, with many children and women among them, Columbus, in the space of a year during which he marched through the country completely pacified the island without having to unsheathe his sword again. He reduced the Indians to such obedience and

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tranquillity that they all promised to pay tribute to the Catholic Sovereigns every three months, as follows:

Where the gold mines were, every person of fourteen years of age or upward was to pay a bag of gold dust, all others were each to pay twenty-five pounds of cotton.

Whenever an Indian delivered his tribute, he was to receive a brass or copper token which he must wear about his neck as proof that he had made his payment, any Indian found without such a token was to be punished.

After this battle the island was so peaceful that a Christian could safely go wherever he pleased. Columbus ascribed this to the favour of God and the good fortune of the Catholic Sovereigns, or else it would have been impossible for two hundred poorly armed men, half of them sick, to subdue such a multitude. But the Lord wished to punish the Indians, and so visited them with such shortage of food and such a variety of plagues that he reduced their number by two thirds, that it might be made clear that such wonderful conquests proceeded from God's supreme hand and not from our strength or intelligence or the cowardice of the Indians.

▲ **Source 2.12** A modified extract from the book *The Life of the Admiral Christopher Columbus* by his son, Ferdinand.

The common ways mainly employed by the Spaniards who call themselves Christian … is by unjustly waging cruel and bloody wars. Then, when they have slain all those who fought for their lives or to escape the tortures they would have had to endure, that is to say, when they have slain all the native rulers and young men (since the Spaniards usually spare only the women and children, who are subjected to the hardest and bitterest servitude ever suffered by man or beast), they enslave any survivors …

Their reason for killing and destroying such an infinite number of souls is that the Christians have an ultimate aim, which is to acquire gold, and to swell themselves with riches in a very brief time and thus rise to a high estate disproportionate to their merits … And I say this from my own knowledge of the acts I witnessed … This is a well-known and proven fact which even the tyrant Governors, themselves killers, know and admit. And never have the Indians in all the Indies committed any act against the Spanish Christians, until those Christians have first and many times committed countless cruel aggressions against them or against neighbouring nations. For in the beginning the Indians regarded the Spaniards as angels from Heaven. Only after the Spaniards had used violence against them, killing, robbing, torturing, did the Indians ever rise up against them.

▲ **Source 2.13** Extracts from *The devastation of the Indies: A Brief Account by Bartolomé de Las Casas*, 1552. Bartolomé de Las Casas (1484–1566) was a Spanish Dominican friar who travelled to the area and, while he initially participated in the Spanish atrocities, he eventually spoke at length with the Taíno people and uncovered their version of events. De Las Casas became famous for his defence of the rights of the indigenous people of the Americas.

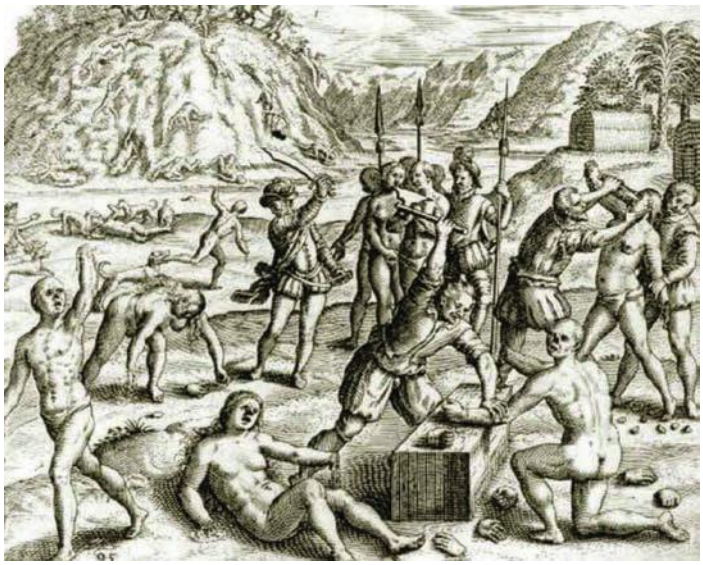
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▲ **Source 2.14** Engraving by Theodore de Bry in 1594, titled *The Indians, to satisfy their wickedness, pour molten gold in the mouths of the Spaniards*. De Bry was an engraver who never visited the New World himself, but based this engraving and the one in Source 2.15 on events described by Bartolomé de las Casas.



▲ **Source 2.15** Theodore de Bry engraving in 1594 of this description by Bartolomé de la Casas in 1552: 'Another time, because the Indians did not give him a coffer filled with gold, … they killed an infinite number of souls, and cut off the hands and noses of countless women and men, and others they threw to the savage dogs, who ate them and tore them to pieces.'

ACTIVITY 2.8
RESPONDING TO THE SOURCES

Should the US commemorate Columbus Day?

Chat GPT has provided this response:

HI Should the US commemorate Columbus Day?

The question of whether the United States should continue to commemorate Columbus Day is a controversial one. Some argue that Columbus and his voyages were responsible for the genocide of indigenous peoples and the beginning of the transatlantic slave trade, and therefore the holiday should be abolished. Others argue that Columbus' voyages were a significant event in world history and that the holiday should be retained as a way of remembering that history. Ultimately, whether or not to commemorate Columbus Day is a matter for individual communities and states to decide.

What do you think?

Reflect on and **analyse** Sources 2.11 to 2.15 to *develop* your own response to the question.

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ACTIVITY 2.9

Class activity

With your class, **conduct** a coroner's investigation into why so many Taíno people died during this time. **Research** what a Queensland Coroner's investigation is and how it is conducted.

Explore Sources 2.12 to 2.15 as well as more detailed accounts on websites listed in the Interactive Textbook for evidence.

When you have explored the available evidence, you could assign people to the roles of Columbus, King Ferdinand and Queen Isabella of Spain, the Taíno and a 'Chief Medical Officer' and have other members of the class question them as witnesses to assist the coroner.

At the end of the investigation, write a short response to these questions:

1 **Determine** who you believe is most responsible for the death of the Taíno people in the late 1400s.

2 **Identify** and **describe** the evidence that is most persuasive in helping you reach that conclusion.

THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Cause and effect.

Your response should contain:

- A clear identification of the causes and/or effects relating to the question
- A clear explanation of how the causes are connected to its effects (i.e. how one event or action led to an outcome or consequence)
- Evidence or examples to support this explanation of the relationship between cause and effect.

How did the Columbus expeditions change the course of life in the Americas?

During the time of Columbus's expeditions, Spanish and Portuguese monarchies were competing to build wealth, control territory and convert the indigenous peoples to Christianity. Competition was so fierce that Portugal asked the Pope, head of the Catholic Church, to declare all lands west of the Atlantic Ocean to be their property alone.

Columbus had found the New World rich in resources such as gold, sugar and tobacco. The news sent shockwaves throughout Europe. The Spanish royalty acted quickly upon the Italian's discovery and made an agreement in 1494 with the Pope and Portugal called the **Treaty of Tordesillas**, which divided the lands around the globe between the two monarchies.

The 'cantino' world map (see Source 2.16), made in 1502, divided up the world in terms of the resources that had been discovered to that point.

Treaty of Tordesillas treaty made to divide the New World between the Spanish and Portuguese monarchies

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▲ **Source 2.16** This Portuguese 'cantino' world map indicates the division of territories between the Spanish and the Portuguese, which was laid out by the Treaty of Tordesillas.

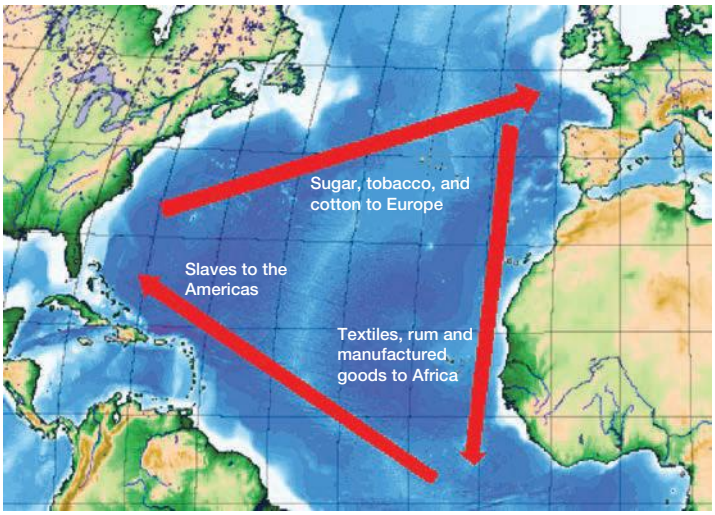
ACTIVITY 2.10
RESPONDING TO THE SOURCE

1 Look closely at the areas where only small sections had been explored and mapped by Europeans. **Identify** which of these small areas you can connect to places on the current world map.
2 **Explain** why a map such as this would encourage European explorers to explore the rest of the map.

Other significant consequences

A NEW GLOBAL VILLAGE

The first voyage of Christopher Columbus began the process of creating a truly global village. The resulting exchange – sometimes called the Columbian exchange – of plants, animals and cultures has enriched all countries. Almost half of all major crops grown throughout the world now originated in the Americas. Potatoes from South America, for example, probably contributed to an explosion in the European population in the 1500s and 1600s.



A NEW SLAVE TRADE

As new Spanish-owned plantations were created on the islands of the Caribbean, and later elsewhere in the Americas, slaves from West Africa were brought in large numbers to the Americas as labourers. This Atlantic slave trade was a key component of the so-called Columbian exchange.

◄ **Source 2.17** Triangular trade of the Columbian exchange

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ACTIVITY 2.11
RESPONDING TO THE SOURCE

1 **Identify** which of the three points of the triangle in Source 2.17 you think benefited most from this exchange.
2 **Explain** what this tells you about power in the world in the 1500s.

NEW DISEASES AND POPULATION DECLINE

Spanish brutality and the introduction of new diseases combined to significantly reduce the indigenous population of the islands of the Caribbean, and later all indigenous populations of the Americas. **Smallpox**, measles, influenza and typhus were some of the diseases previously unknown in the Americas.

smallpox extremely infectious disease that causes a fever, spots on the skin, and often death

NEW EXPLORATION

After Columbus first arrived in 1492, the Spanish swept across the Caribbean within 20 years. As they hopped across the islands like stepping stones, they also landed on parts of North, South and Central America.

In North America, the Spanish explored areas now known as Florida, Texas, New Mexico and Mississippi. In South America, they explored and colonised the areas from modern-day Venezuela to Panama.

But in Central America, exploring along the Yucatán peninsula, they began to hear stories of a great empire to the west. They had stumbled upon the gateway to the Aztec Empire in Mexico.

REFLECTING ON YOUR LEARNING 2.2

Reflect on what you have learned in this section:

1 Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the questions: 'Why did Europeans begin exploring further in the fifteenth century?', 'What happened when Columbus arrived in the Americas in 1492?' and 'What consequences flowed from the Columbus expeditions?'
2 **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'How did the arrival of the Spanish from 1492 change the Americas?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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2

2.3 What was life like for the Aztecs before Europeans arrived?

FOCUS QUESTIONS

- Who were the Aztecs?
- What was life like in the Aztec Empire? How was society organised?

Mexica indigenous people who lived in the Valley of Mexico and created the Aztec Empire

Nahuatl language spoken by the Mexica

Aztec Empire alliance of three great cities in the Valley of Mexico

The Aztecs

The **Mexica** (pronounced Me-SHEE-ka) people arrived in the Valley of Mexico around 1250 and found fertile soil, rivers and high mountains. With 2000 years of established culture, scientific traditions, trade, currency and social structures, they were one of the most sophisticated civilisations in the world. Speaking the **Nahuatl** (pronounced NA-wat) language, the Mexica established themselves within this region by forming an alliance with the other two largest city-states in the region, creating the **Aztec Empire** in 1428. We call them the Aztecs, and their lands stretched from the Pacific Ocean to the Gulf of Mexico.



▲ **Source 2.18** The Aztecs used sophisticated studies of astrology, ceramics, architecture and writing. The Aztec Sun Stone was thought to represent and explain the role of time in Aztec culture and chart the 20-day Aztec calendar month.



▲ **Source 2.19** The Aztec Empire at its height was centred on the 'Valley of Mexico' on a plateau in what is now southern Mexico. The Empire's capital Tenochtitlan was on Lake Texcoco in the valley.

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Four metres in diameter and a metre thick, the Sun Stone was found buried in Mexico City in 1790. Most historians agree the Aztec Sun God **Tonatiuh** is at its centre. The four points around the face of the Sun God represent the 'four suns', or periods of time (eras), that came before the one when the stone was created. Each one explains how that world died or came to an end.

Tonatiuh Aztec God of the Sun

prophecy prediction of what will happen in the future

1 Death by Jaguars
2 Death by Wind
3 Death by Fire
4 Death by Water.

A fifth sun within the carving gives the **prophecy** that 'this world' would come to its end via earthquake.

ACTIVITY 2.12
MAKING THINKING VISIBLE

I used to think … Now I think …

1 Write down what Source 2.18 makes you think about the Aztec understanding of the Earth and its place in the solar system.
2 Research Nicolaus Copernicus (1473–1543) and Galileo Galilei (1564–1642) and **explore** what Europeans thought about Earth and its place in the solar system before 1500 CE.
3 Now write a sentence beginning with 'I used to think …'
4 Write another sentence beginning with 'Now I think …'

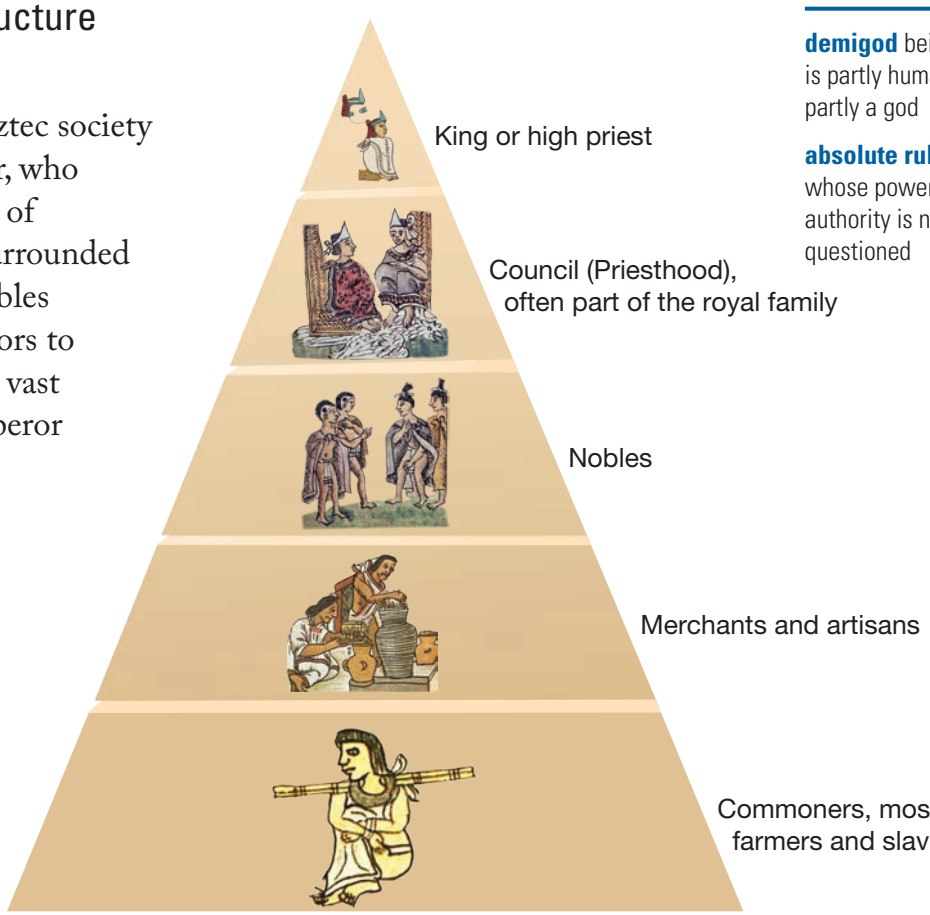
Discuss your changes in thinking with your peers.

The social structure of the Aztecs

At the top of Aztec society was the emperor, who enjoyed the role of **demigod** and surrounded himself with nobles and administrators to help control the vast empire. The emperor was expected to be experienced in warfare and strategy. The emperor was an **absolute ruler**.

demigod being who is partly human and partly a god

absolute ruler ruler whose power and authority is never questioned



► **Source 2.20** The social structure of the Aztecs

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The nobility were often related to the emperor by blood or marriage and took up the roles of military commanders, priests and judges. Most were wealthy landowners. Nobles were also the only class permitted to display their wealth through decorated capes and jewellery.

calpulli small Aztec neighbourhoods

obsidian type of almost black rock that is like glass

Commoners were usually skilled craftsmen like builders, farmers and artisans who lived in small neighbourhoods known as ***calpulli*** where one noble would govern over the area. The hard labour was completed by serfs or slaves.

The role of common women was limited to marriage and child rearing. The creation of children was revered among Aztec culture.

Girls were raised to be married off around the age of 16, while boys were expected to become warriors who could hope for a glorious death in battle, or a horrible one at the hands of their enemies.

Warriors were taken from both the common and serf classes and expected to fight when requested. The Aztec Empire had not developed steel, so weapons were made from fire-hardened wood and lined with sharp **obsidian** forged from volcanic rock. A warrior's reward came from the number of prisoners he could take, rather than kill. The more prisoners, the better the warrior. Some prisoners would be sacrificed to please the gods.

A prisoner lucky enough to avoid sacrifice would be used as a slave. Slaves completed the hardest work in the Aztec Empire. However, a slave could buy their own freedom, or marry their owner! A slave was free once their owner died, and in addition to this, the children born to slaves were not considered to be slaves themselves.



ACTIVITY 2.13
MAKING THINKING VISIBLE

Question starts

1. Read the description of the Aztec social structure and brainstorm a list of 10 questions about this structure.
2. With your group, **decide** on three questions from your individual lists that seem most interesting.
3. With your class, **select** a small number of questions to explore further and do some research to see what you can find.
4. **Share** your most interesting insights with your class.

Were the Aztecs popular rulers?

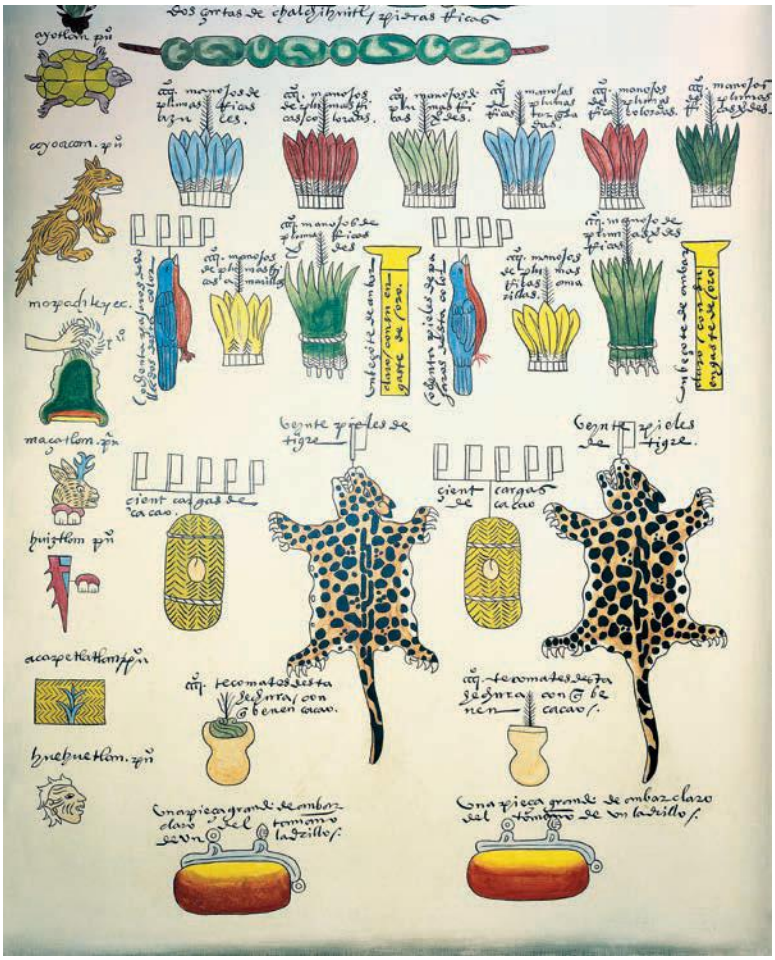
The Aztecs rose to power by conquering the various Mexica groups and city-states by force. Not all of these groups enjoyed Aztec rule. Aztec rule was strict, and they brutally punished those who opposed

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their rule. If the region was unable, or refused, to pay their **tribute** to **Tenochtitlan**, Aztec warriors would take prisoners by force to become slaves or to feed the need for human sacrifice.

tribute form of tax paid to a ruler

Tenochtitlan capital city of the Aztec Empire, referred to as 'Mexico' by the conquistadors



▲ **Source 2.21** This image is a reproduction from the *Codex Mendoza*. It is an illustration of the taxes paid to Aztec rulers by subject peoples.

ACTIVITY 2.14 MAKING THINKING VISIBLE

See, think, wonder

1. Look carefully at Source 2.21. What objects do you see and recognise? Work with a partner to list as many as you can.
2. **Compare** your answers with another pair of students. Were they able to identify any objects that you could not? List those too.
3. Now go to https://cambridge.edu.au/redirect/9593 and hover over each of the images to see what the images and words actually did represent.
4. If this is just one example of a tribute paid to the Aztecs, what might it tell us about their overall wealth and the way they treated their subject peoples?

Religion and rituals of the Aztecs

Religion was at the centre of Aztec life. Their gods provided sun, rain, food, water, fire, life and death. For Aztecs, the world would one day come to an end and a new 'era' would follow.

Huitzilopochtli was the god of Sun and War and was one of the most demanding, as he fought the dark night sky so the sun would rise in the morning. The Aztecs believed they only existed as long as they kept their gods happy. To please gods such as Huitzilopochtli, Tlaloc (the god of rain), Tezcatlipoca (the god of the night), Chicomecōātl (the goddess of agriculture), Xipe Totec (the god of spring and new vegetation) and Mictlantecuhtli (Lord of the Dead), they made offerings in human blood.

Quetzalcoatl (meaning 'feathered serpent') was opposed to human sacrifice and was banished by the other gods. It was believed that Quetzalcoatl

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would return from the west to destroy the Aztecs. For centuries, the Spanish and some historians claimed that the Aztecs believed Spanish explorer Hernán Cortés was Quetzalcoatl in human form.

ACTIVITY 2.15
MAKING THINKING VISIBLE

Examine the images shown in the activity.

SOURCE A



▲ **Source 2.22** Terracotta figure of the Lord of the Dead, Mictlantecuhtli

SOURCE B



▲ **Source 2.23** Aztec god of the dead, Mictlantecuhtli, represented in a fifteenth-century gold pendant, one of the few gold ornaments that escaped being turned into bullion by the Spanish conquistadors

SOURCE C



▲ **Source 2.24** Pottery depicting Chicomecōātl

SOURCE D



▲ **Source 2.25** Urn depicting Tlaloc, the rain god, from Tenochtitlan, Mexico

SOURCE E



◄ **Source 2.26** Aztec god of the dead, Mictlantecuhtli

SOURCE F



▲ **Source 2.27** Recreation of a feather shield of an Aztec warrior

SOURCE G



▲ **Source 2.28** In elaborate ceremonies, priests would use knives to make sacrifices to the gods.

SOURCE H



◄ **Source 2.29** Pectoral ornament in the form of a double-headed serpent, one of the symbols of Tlaloc. It was worn by a high priest. It may have formed part of the treasure sent to Cortés by Moctezuma, who believed Cortés to be the returning god Quetzalcoatl.

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SOURCE I



▲ **Source 2.30** Basalt statuette of the god Quetzalcoatl, the feathered serpent

SOURCE J



▲ **Source 2.31** Quetzalcoatl mask

SOURCE K



▲ **Source 2.32** Open-mouthed stone mask of Xipe Totec dressed in the skin of a sacrificial victim. In the festival of Tlacaxipeualiztli, a sacrificial victim was skinned alive and a warrior danced dressed in the skin. The ceremony symbolised the bursting of the skin of the maize seed.

SOURCE L



▲ **Source 2.33** Side view of the Sun Stone

SOURCE M



▲ **Source 2.34** Collapsed *tzompantli*, or wall of carved skulls. Such carvings were near every Aztec temple and wooden versions (skull racks) were used to store the heads of slain enemy warriors.



▲ **Source 2.35**
The Coyolxāuhqui Stone

See, think, wonder

Select three of the items that interest you most. Look carefully at those items and write down answers to these questions:

1 What do I see?
2 What do I think?
3 What do I wonder?

Discuss your responses with other members of your class.

Then write a short answer to the question: what do these items tell us about Aztec life?

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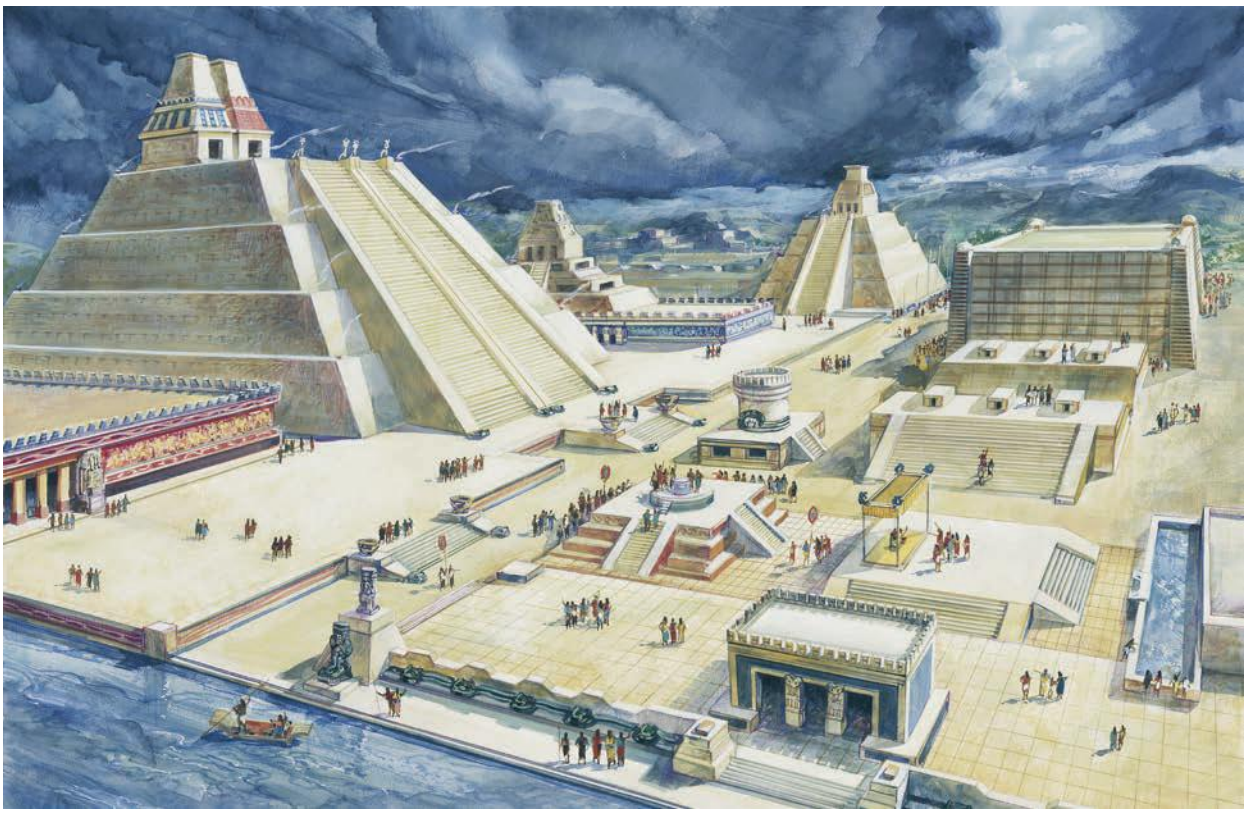
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HUMAN SACRIFICE

Human sacrifice occurred regularly. At intervals marked out by the Sun Stone, prisoners were forced to walk to the top of great temples, and were stretched out across a stone altar as priests held their limbs down. Their chests were carved open with obsidian blades as the still-beating heart was removed and offered to the sun. The remaining priests would then dismember the limbs, tossing them down the stairs.

tzompantli wooden rack used for the public display of human skulls, also a wall of skulls carved in stone

Highly trained priests would preserve the skull and place it on the ***tzompantli***, an enormous rack of skulls built in front of the Templo Mayor – a pyramid with two temples on top. It was rumoured the rack contained over 130 000 skulls. Not all sacrifices were prisoners. Often the deaths were used to remind people of the power of the Aztec rulers.



▲ **Source 2.36** An artist's reconstruction of the Templo Mayor in Tenochtitlan

Class brainstorm: What does this image make you think about the Aztecs?

idol image or an object that resembles a god

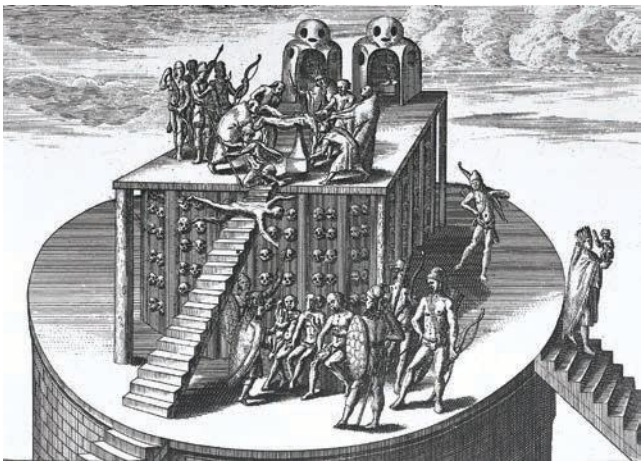
They strike open the wretched Indian's chest with flint knives and hastily tear out the palpitating heart which, with the blood, they present to the **idols** in whose name they have performed the sacrifice. Then they cut off they arms, thighs and head, eating the arms and thighs at ceremonial banquets. The head they hang up on a beam and the body of the sacrificed man is not eaten but given to beasts of prey.

▲ **Source 2.37** Quote from Spanish soldier Bernal Díaz recounting his experience in Tenochtitlan in 1521 from *Memoirs, of the Conquistador Bernal Diaz del Castillo written by himself containing a true and full account of the discovery and conquest of Mexico and New Spain,* 1844

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▲ **Source 2.38** Illustration of human sacrifice published in the book *The History of the Indies of the New Spain* in 1579

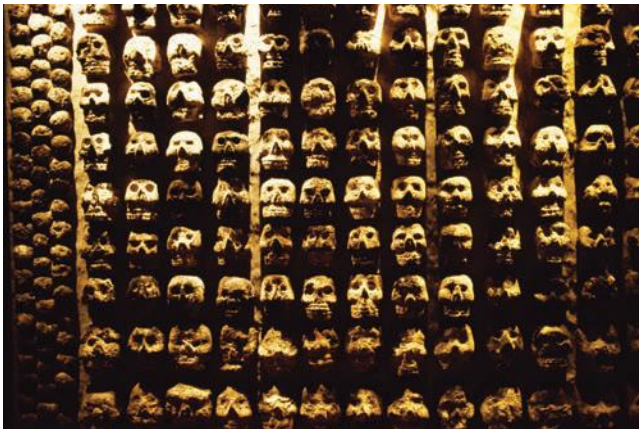


▲ **Source 2.39** Human sacrifice depicted in 1579, with *tzompantli* of real skulls

ACTIVITY 2.16
MAKING THINKING VISIBLE

I used to think … Now I think …

1. **Create** a list of your present thoughts, values and judgements about human sacrifice.
2. Study Sources 2.37 to 2.40 about Aztec human sacrifice. Now imagine travelling back in time to about 1520 CE (before the arrival of the Spanish) when attitudes were possibly different. **Create** a list of past Aztec thoughts, values and judgements about this topic.
3. **Compare** past and present perspectives from your lists. Why do you think things have changed? Why did people in the past not think the way we do today?
4. Complete the statements: I used to think … Now I think …



▲ **Source 2.40** *Tzompantli* of carved stone skulls excavated at Templo Mayor

SPORT AND CHOCOLATE

Life in the Aztec world was not all death and sacrifice. The Aztecs did believe in a life after their own, but that did not mean they did not enjoy the one in the present. The ball sport ***ullamaliztli*** played an important role in Aztec life as it reflected many of the principles by which they lived. Played on a court that was designed to reflect the battle between the sun and the moon, games usually took place on days of great importance like religious festivals and market days.

Farmers grew **maize**, which formed the basis of a range of Aztec foods, including porridge, corn cakes and tortillas. The Aztec diet consisted mainly of vegetables and fruits including tomatoes, avocados, chillies, potatoes, beans, limes and meat such as dog and turkey. Chocolate originated in **Mesoamerica** and was a valued commodity among the Aztecs and a form of currency at markets around the empire. The Mesoamerican version of chocolate '***xocoatl***' was served hot to lighten the mood and relax victims preparing for their own sacrifice.

ullamaliztli ancient Aztec ball sport

maize corn, sweetcorn or 'corn on the cob', a cereal that originated in southern Mexico

Mesoamerica region in the Americas, extending approximately from central Mexico to Belize, Guatemala, El Salvador, Honduras, Nicaragua, and northern Costa Rica

xocoatl Aztec chocolate drink

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ACTIVITY 2.17
MAKING THINKING VISIBLE

Headlines

1 If you were to write a newspaper-type headline based on your first impression of the Aztec practice of human sacrifice, what would that be?
2 If you were to write another headline, now that you know something more about Aztec lifestyle, what would that be?
3 **Compare** your two headlines with your peers.

Life in Tenochtitlan

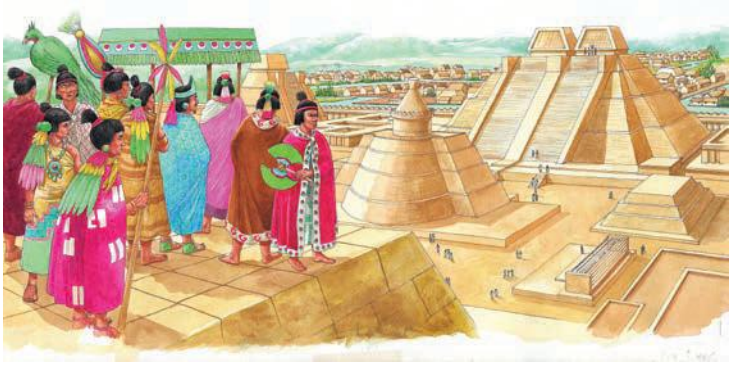
The city of Tenochtitlan was the epicentre of the Aztec universe. Prior to the arrival of the Spanish in 1521, it was one of the largest cities in the world, boasting an estimated population between 300 000 and 500 000.

Surrounded by lakes and marshes high in the mountains, the Aztecs built floating gardens that provided the city with food, moved fresh water around and disposed of waste via sewers. A grand array of temples and palaces existed within the centre of the city, devoted to human sacrifice and worship of the gods.

causeway wide embankment or dyke constructed across marshes or shallow water

► **Source 2.41** Bernal Díaz provides his recollection of seeing the city for the first time.

> And when we saw all those cities and villages built in the water, and other great towns on dry land, and that straight and level **causeway** leading to Mexico we were astounded … buildings rising from the water, all made of stone, seemed like an enchanted vision …



▲ **Source 2.42** An artist's impression of Aztec nobles and warriors surveying the ceremonial centre of Tenochtitlan

Underground springs provided the city with clean water for drinking, washing and growing crops in the floating gardens of the city. The Aztecs were passionate about flowers. The city was decorated with the flowers grown in its countless gardens, bringing colour and vibrancy to the city.

ACTIVITY 2.18
MAKING THINKING VISIBLE

Headlines

Write a newspaper headline that captures the most important aspect/s of everything you now know about the Aztecs that should be remembered.

How is this headline different to your headline in Activity 2.17?

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MARKET DAY

Markets were an essential element of every Aztec city, serving tens of thousands of people each day. Each market was organised so that every type of product from every area of the Aztec Empire could be sold in its own section.



► **Source 2.43** Tlatelolco Marketplace as depicted in a diorama at the Field Museum of Natural History, Chicago. The largest Aztec market was located in Tenochtitlan's neighbouring town, Tlatelolco.

> We were astounded by the great number of people and the quantities of merchandise … dealers of gold, silver and precious stones, feathers, cloaks and embroidered goods. Male and female slaves are sold there … in another part were the skins of tigers and lions, otters, jackals and deer … There were sellers of kidney beans and sage and other vegetables, in yet another they were selling fowls, and birds and dewlaps (turkeys) also rabbits, hares, deer, young ducks, little dogs and other such creatures.

▲ **Source 2.44** Bernal Díaz's commentary on the size and scale of this market

ACTIVITY 2.19
MAKING THINKING VISIBLE

Think, pair, share

1 Think about everything you know about Aztec life before the arrival of the Spanish. On which aspects do you think we can make the fairest judgements about them as a civilisation? Is it their religious practices, their engineering and architecture, their tribute system, their markets, their leisure activities or something else?
2 Pair and share your thinking with a peer.
3 Share your thinking with your class. **Discuss** different opinions and reasons for those different opinions.

REFLECTING ON YOUR LEARNING 2.3

Reflect on what you have learned in this section:

1 Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the questions: 'Who were the Aztecs?', 'What was life like in the Aztec Empire?' and 'How was society organised?'
2 **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'How did the arrival of the Spanish from 1492 change the Americas?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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2

2.4 Interpretations about the Spanish conquest of the Americas: interactions between the Spanish and the Aztecs

FOCUS QUESTIONS

- Who was Cortés and what motivated him?
- How did Moctezuma II and Cortés respond to each other?
- How were the Spanish eventually able to conquer the Aztecs?

The Aztecs were very different to the people the Spanish had encountered in the Caribbean islands and, consequently, this interaction was also very different to what we saw in our study of Columbus.

Key individuals: the conquistadors

HERNÁN CORTÉS



▲ **Source 2.45** An eighteenth-century portrait of Hernán Cortés, based on a portrait made during his lifetime.

Hernán Cortés grew up poor in the Spanish town of Medellin. Excited by the tales of the New World, he left for Hispaniola in 1504 at the age of 19. He had little sailing and no military experience but joined in the conquest of Cuba in 1511. When news of a potential expedition to the mainland of the Americas arose in 1519, he used his charm and natural gift for leadership to gather six ships, 300 men known as 'conquistadors' (conquerors) and 16 horses and set sail for the Yucatán Peninsula, in modern-day Mexico.

His journey would change the course of the New World forever. In two years, he would stand victorious in the ashes of the Aztec Empire.

BERNAL DÍAZ

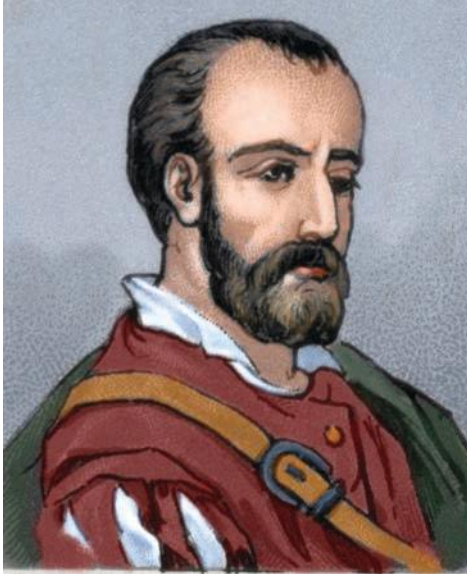
Bernal Díaz del Castillo was a soldier in Cortés's expedition and stayed with him for the duration of his adventure in Mexico. He is most famous for recording his entire time with Cortés in the book *The Conquest of New Spain* that was transcribed shortly before his death in 1584.

Just before Diaz died, he chose to write his history after he had read those of Gomara (mentioned later in this chapter) and other Spanish historians who he felt 'spoke the truth, neither in the beginning, nor the middle, nor the end'. The book and its recollections were created

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almost 50 years after the events it describes. You can find translations in English online by searching for Bernal Díaz and the title.

The success of Cortés and Díaz came down to a few important factors and people. Two key players were a princess turned slave and the great Aztec Emperor Moctezuma II, as described next.



▲ **Source 2.46** Bernal Díaz

ACTIVITY 2.20

Check your understanding

1 **Identify** the role Bernal Díaz played in the conquest of Mexico.
2 **Explain** why Díaz chose to record his version of events.
3 **Explain** why we could regard Díaz as a reliable source.
4 **Identify** the problems we could have using Díaz as a reliable source.

Key individuals: the slave and the Aztec Emperor

LA MALINCHE

The young woman known by the names La Malinche, Malatzin or Dona Marina played a critical role in the conquest of the Aztecs. In the early days of Cortés's time in Mexico, a small group of slave women were given to the Spanish as a gift from a Yucatán tribe defeated in battle.



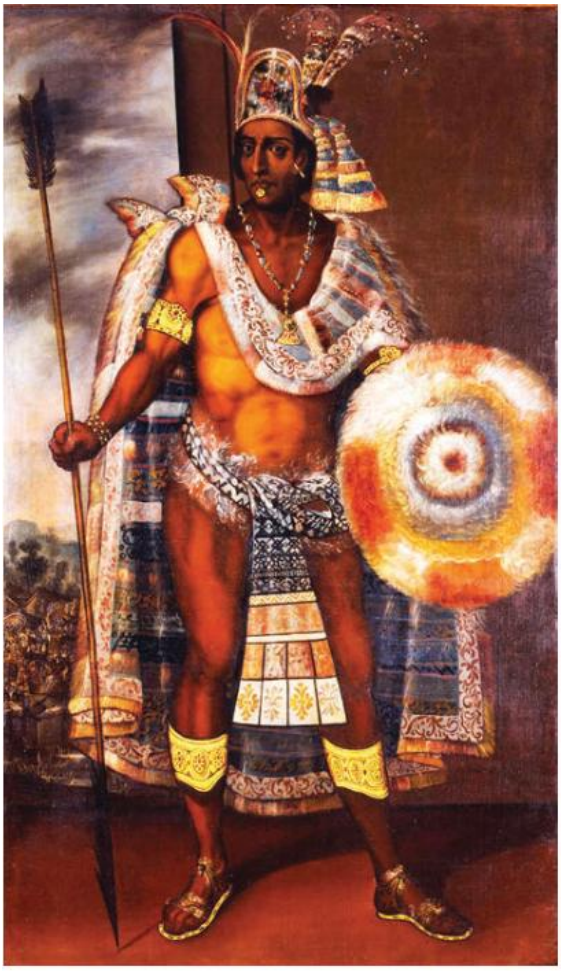
▲ **Source 2.47** La Malinche

La Malinche was born a princess but was given away to slavery in secrecy to allow her step-brother to take over the noble role. An intelligent and highly capable woman, she spoke the languages of the Maya and the Aztecs. With Cortés, she learned Spanish quickly, converted to Christianity, fell in love with the explorer and became an indispensable translator.

La Malinche is remembered as a controversial figure. She is seen on one hand as a woman who made the best of a bad situation and by others who saw her actions as the betrayal of all Mesoamerican peoples. Her role in helping the Spanish conquer the Aztecs is significant.

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▲ **Source 2.48** Moctezuma II

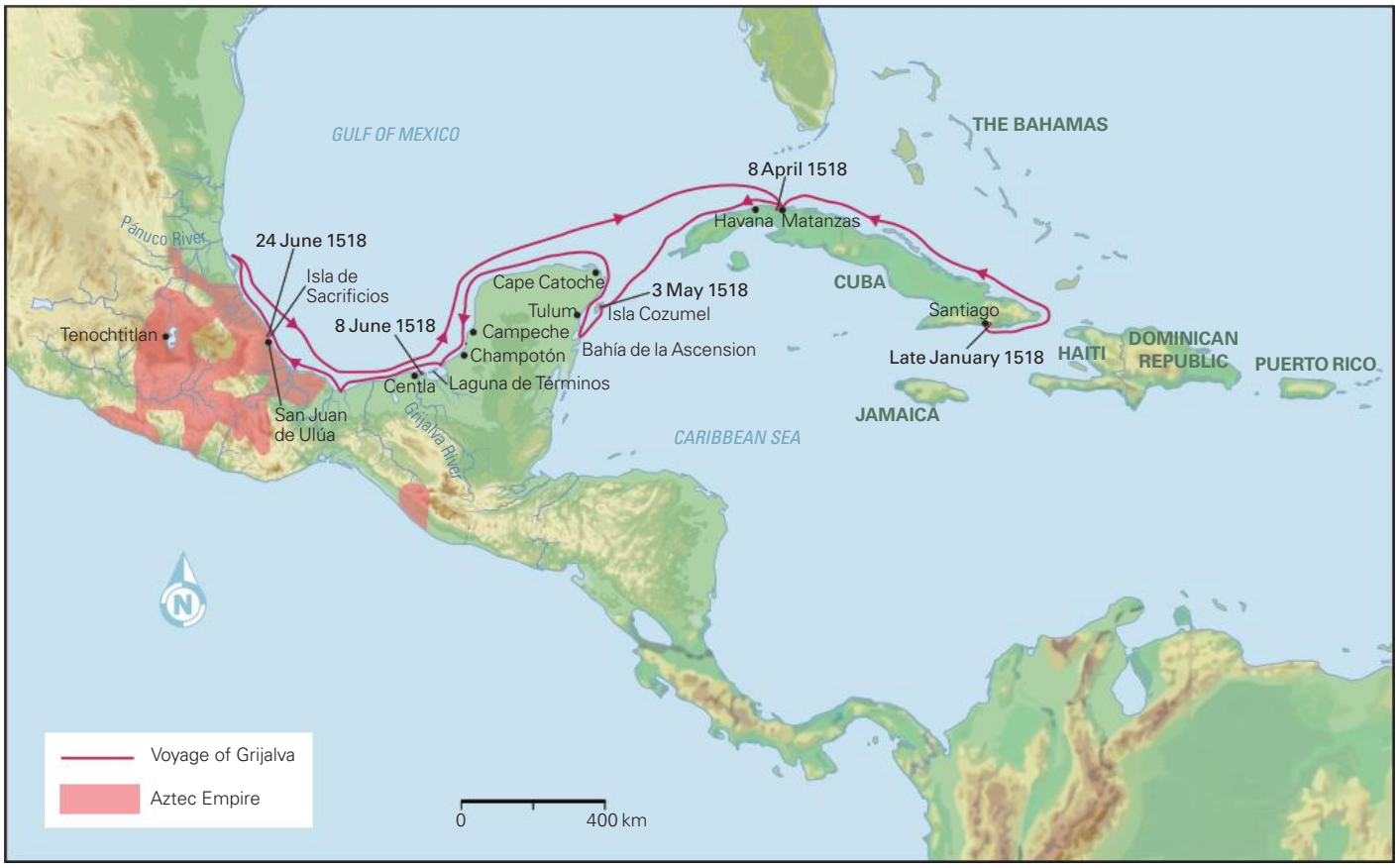
MOCTEZUMA II

Moctezuma II was the ruler of the Aztecs from 1502 to 1521. He was the relative of Moctezuma I, the ruler who had brought much of the Aztec Empire together. When Moctezuma II came to the throne, the extent of Aztec influence stretched for more than 120 000 square kilometres across many areas in what is now central and southern Mexico.

Little is known about Moctezuma II's personality, only how he fought and ruled. His enemies were punished and violently sacrificed to the gods, and those who did submit to his rule were heavily taxed through tributes.

First contact and La Malinche

Cortés was not the first Spaniard to reach the Aztecs. An expedition led by Juan de Grijalva charted much of the coastline of the area in 1518, and although he did not know it then, he had made contact with the Mexican mainland and with subjects of the Aztec Empire. Grijalva learned



▲ **Source 2.49** Grijalva voyage route and the extent of the Aztec Empire

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about a large and wealthy kingdom nearby, and Moctezuma II was informed about these foreigners, their ships and their weapons.

Having learned about Grijalva's voyage, Cortés and the conquistadors first saw the Yucatán Peninsula from their ships in February 1519. Trouble quickly followed and clashes broke out at Tabasco.

Despite being heavily outnumbered, the conquistadors had a significant advantage: weaponry. Mesoamerican civilisations did not have steel swords and armour. The Spanish did, and also brought with them cannons, muskets, deadly crossbows and a few horses.

The indigenous people of central America feared the horses as no such animal existed in their part of the world. Bernal Díaz stated that the tribes 'thought that the horse and rider were one creature'. In the early skirmishes, the conquistadors triumphed with only a few dead and injured. The wooden weapons used by the indigenous tribes were no match for the Spanish sword. A conquistador could kill dozens with what Díaz called 'good swordplay'.

After the first of many major battles, the Spanish suffering only a few wounded men, Díaz recalled the scene:

> When it was over we bandaged the wounded … We then went to look at their dead that were lying about the field, and found more than eight hundred, most of whom had been killed by sword-thrusts, and the rest by cannon, muskets and crossbows … the battle had lasted over an hour.

▲ **Source 2.50** Bernal Díaz, *The Conquest of New Spain*, 1576

After their defeat in battle, the leaders of the Tabasco region gave the conquistadors a gift of 20 slave women. One of the women was the former daughter of a noble, La Malinche. The Spaniards now had a translator.



ACTIVITY 2.21
MAKING THINKING VISIBLE

Compass points

Think about what you have learned so far about Cortés and his expedition.

1. Excited: What excites you about learning this topic?
2. Worrisome: What worries you about this topic?
3. Need to know: What else would you like to know to better understand this topic?
4. Stance: What is your current feeling about this topic? What opinion are you beginning to form about Cortés and his expedition?

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Cortés: a god?

The Spanish expedition brought two worlds together where neither knew the other existed.

Cortés and his men were seeking gold, fame and Christian converts. Most of the local tribes were wondering when they would leave.

History has recorded that Cortés's arrival was momentous for the Aztecs. In 1516, a great comet flew across the sky to the east of Tenochtitlan, which was thought to confirm the prophecy that the exiled god **Quetzalcoatl** was coming to end the Aztec world. He was thought to appear from the east, as a man with a white beard. Was Cortés Quetzalcoatl?

Quetzalcoatl Aztec god of wind and air



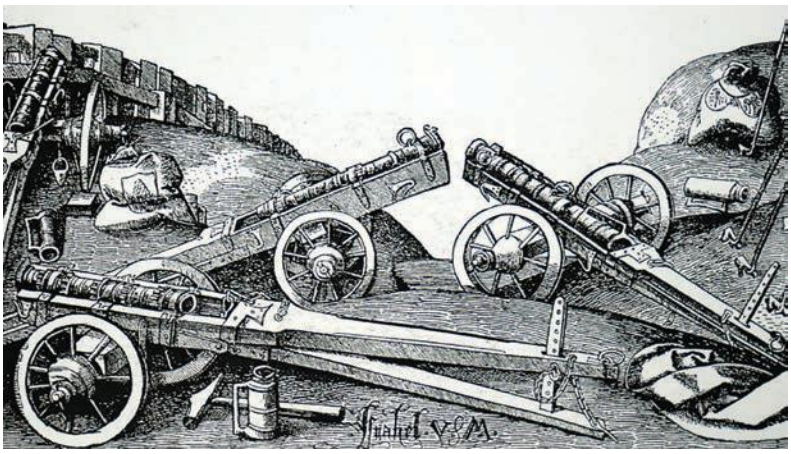
▲ **Source 2.51** An image of the Aztec god Quetzalcoatl

According to the Aztec calendar, he was due to arrive in 1519 … precisely when Cortés landed.

Historians have since debated whether this story was a creation of Spanish historians to justify their conquest and an excuse made up by local tribes eager to see the Aztecs defeated. Most historians now believe that Moctezuma II did not believe Cortés and the Spanish to be gods. However, the timing of Cortés's arrival did match the dates of the prophecy almost exactly.

Gesture from Moctezuma II

On 20 April 1519, Cortés was sent gifts by representatives of Moctezuma II with a simple message: *Stay away from Tenochtitlan*. The Spaniard accepted the gifts and sent them home on a single ship to his king, but not before giving the Aztec representatives a terrifying display of horses charging at full speed, war dogs that could tear apart the enemy, muskets and cannons firing around them. The nervous representatives were stunned and returned to Moctezuma II with sketches of the horses and dogs made by artists.



▲ **Source 2.52** A nineteenth-century illustration of Hernán Cortés' cannons used during his conquest of Central America

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Source 2.53 is from the *General History of the Things of New Spain* by Bernardino de Sahagún, the Franciscan missionary who wrote the *Florentine Codex*.

> The Spaniards appeared to be much delighted, they seized upon the gold like monkeys, their faces flushed. For clearly their thirst for gold was insatiable; they starved for it; they lusted for it, they wanted to stuff themselves with it as if they were pigs … told the Aztecs that he and his men suffered from a disease of the heart which is only cured by gold.

▲ **Source 2.53** Bernardino de Sahagún, *General History of the Things of New Spain*, sixteenth century

ACTIVITY 2.22
MAKING THINKING VISIBLE

Claim, support, question

1 Why do you think Cortés did not comply with Moctezuma's request to stay away?
2 What evidence do you have to support this claim?
3 What questions do you have about Cortés and Moctezuma now?

Cortés was feeling confident, but all was not well with his conquistadors. Some thought they were there simply to explore and trade, not wage war, and they grew angry with Cortés. That was, after all, their original orders from the Governor of Cuba and the King of Spain. Some of the Spanish wanted to go home, not start a war.

At the same time, Cortés realised his ships were badly in need of repair because the timber was rotting. Because he didn't have time to repair them at that point, he **scuttled** all but one of his ships. This action also had the effect of preventing discontented men from easily going home, so they stayed together.

scuttling deliberate sinking or running aground of a ship, especially your own. By running a ship aground, there is always a chance of returning at a later to date to repair it.



◄ **Source 2.54** Hernán Cortés's army landing in Vera Cruz, Mexico in 1519, embarking on the first battle of this conquest. Cortés scuttled all but one of his ships to prevent a mutiny by some of his men.

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In September 1519, they entered the Tlaxcala territory, a region of 200 villages united by their hatred of Moctezuma II and the Aztecs. After two weeks of battles, which the Spaniards won, La Malinche translated that they were looking for gold. The Tlaxcalans pointed west to Tenochtitlan.



▲ **Source 2.55** The route Cortés took to Tenochtitlan

At this moment a very important strategic alliance was made; despite their defeat, the Tlaxcalans still had thousands of warriors who would help Cortés fight Moctezuma II. The tiny band of conquistadors now had an army.

The massacre at Cholula

As the new force marched toward Tenochtitlan, the city of Cholula lay in their path. La Malinche heard rumours that the lords of the city were planning to trap the Spaniards in the city and kill them. Cholula was one of the largest cities in the region and an enemy of the Tlaxcalans. The conquistadors warily agreed to meet the Cholula nobility in the centre of the city.

> He [Cortés] said: 'How anxious these traitors are to see us among the ravines so that they can gorge themselves on our flesh. But our Lord will prevent it.' … Cortés then asked why they had turned traitors and decided the night before that they would kill us, seeing that we had done them no harm but had merely warned them against … wickedness and human sacrifice, and the worship of idols … Their hostility was plain to see.

▲ **Source 2.56** Bernal Díaz, *The Conquest of New Spain*, 1576

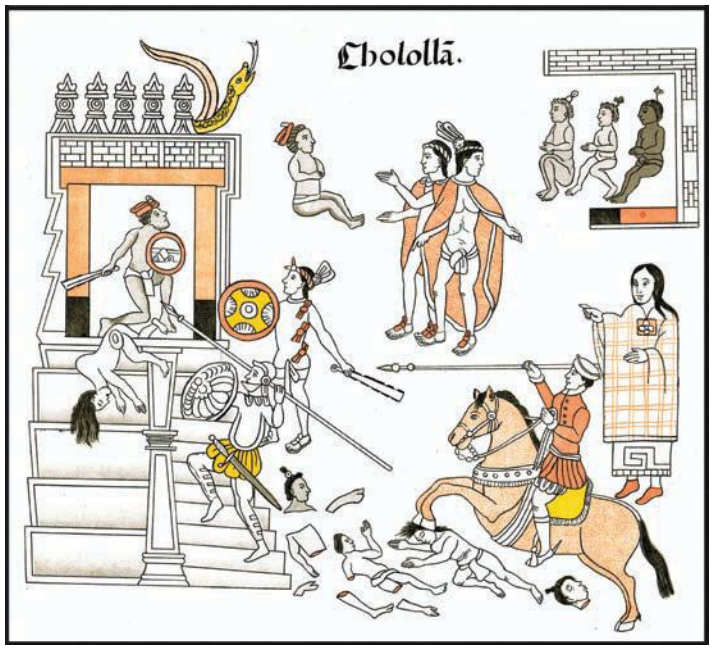
Upon entry, the Spaniards noted that the city had been prepared for battle. Women and children had fled, rocks were stockpiled, and pits had been dug to trap horses. This trap had been set on the orders of Tenochtitlan and Moctezuma II. In the square, Cortés and Díaz met with the nobility.

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Cortés ordered the conquistadors to massacre the unarmed nobles as the Tlaxacalan allies attacked from outside the city. Within hours, thousands of Cholulans were dead in the streets and a terrifying message had been sent to Moctezuma II.

What do you think might have been the purpose of the depiction in Source 2.57?

What purpose do you think Parra was trying to achieve with the painting in Source 2.58?



▲ **Source 2.57** This depiction of the battle at Cholula was drawn by Tlaxcallans. This is a 1773 reproduction from the 1584 original version of the *Lienzo de Tlaxcala*.



▲ **Source 2.58** This 1877 painting by Mexican painter Felix Parra is called *Episodes of the Conquest: Massacre of Cholula*.

ACTIVITY 2.23
MAKING THINKING VISIBLE

See, think, wonder

1. What do you see in Sources 2.57 and 2.58?
2. What do you think about that?
3. What does it make you wonder?
4. What do you think Moctezuma would be thinking about Cortés when he heard the news of the massacre in Cholula?

A meeting of worlds

Fearing attack at every turn, the Spaniards marched for seven days in full battle formation, and on 8 November 1519 they entered the great city of Tenochtitlan and met Moctezuma II on a narrow causeway.



► **Source 2.59** Coloured lithograph *Entrance of Cortés into Mexico*, created in 1892, depicting the first meeting between Cortés and Moctezuma on 8 November 1519

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THINKING DEEPER

Who do you think is presented as more powerful in Source 2.59, the Aztecs or the Spaniards?

Bernal Díaz recorded the entrance to the city:

> We were scarcely four hundred strong and we had all remembered the words and warnings … we had received to beware entering the city of Mexico, since they would kill us as soon as they had us inside … What men in the world have shown such daring?

▲ **Source 2.60** Bernal Díaz, *The Conquest of New Spain*, 1576

The two groups met with the Aztec Emperor surrounded by lords and nobles dressed in their finest gold and feathers. The meeting was awkward, but friendly. Moctezuma II accepted a gift of jewels from Cortés and invited the conquistadors to stay in his great city. Thousands of the city's residents had seen the meeting and had heard what had happened in Cholula.

One Aztec recounted the tension felt in the city:

> As if everyone had eaten stupefying mushrooms … as if they had seen something astonishing. Terror dominated everyone, as if all the world were being disembowelled … People fell into a fearful slumber.

▲ **Source 2.61** Cited in Michael Wood, *Conquistadors*

ACTIVITY 2.24
MAKING THINKING VISIBLE

Headlines

If you were to write a newspaper headline for this meeting to capture the most important aspect that should be remembered, what would that headline be?

The downfall of Moctezuma II

The two leaders got to know each other. As Moctezuma II showed Cortés his palaces and temples, the Spaniard was horrified by the brutality of human sacrifice and the confronting imagery of Aztec gods.

He insisted that Moctezuma II and his people should submit to the Spanish king, reject their gods and convert to Christianity. Moctezuma II declined all these ideas.

Despite these encounters, the conquistadors ate with the emperor and nobility, and were taken on tours of the city. They were treated as guests. However, Cortés could not accept the Aztec way of life.

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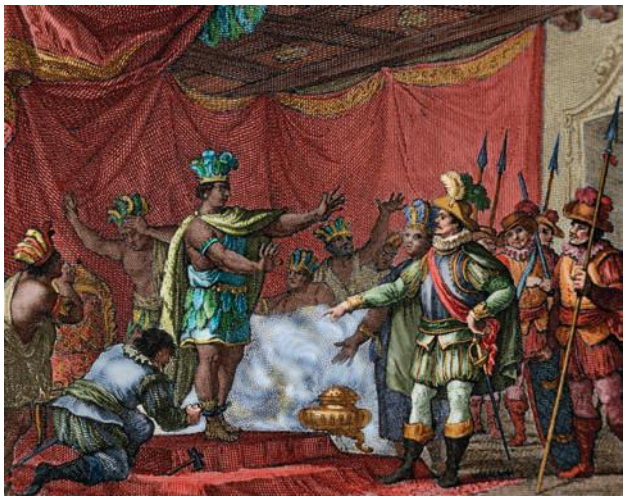
When presented with Aztec statues, he threw them down the temple steps and smashed them.

The conquistadors were nervous. Despite their alliance with the Tlaxcalans, they were outnumbered in Tenochtitlan. The human sacrifices and the signs of Aztec power played on their minds. They became paranoid, so Cortés ordered the kidnapping of Moctezuma II. Bernal Díaz recalled the fears expressed by the conquistadors:

> We begged him [Cortés] not to trust the goodwill and affection Moctezuma was showing us … If we wanted to preserve our lives we must seize Moctezuma immediately
>
> … We pointed out all the gold Moctezuma had given us and all that we had seen in the treasury of his father … and all that we ate was turning to poison in our bodies for we could not sleep at night … While these thoughts were in our minds … the better and more profitable thing would be to seize Moctezuma rather than sit and wait for him to attack us.

▲ **Source 2.62** Bernal Díaz, *The Conquest of New Spain*, 1576

Cortés made his move on 14 November 1519, just days after the Spanish entered Tenochtitlan. Moctezuma II was lured into a trap and kidnapped in his own palace. The plan was to control Tenochtitlan through the emperor. Moctezuma II was confined to captivity in the palace, while the conquistadors helped themselves to the gold and treasure within.



▲ **Source 2.63** An 1807 engraving showing Cortés kidnapping and holding Moctezuma prisoner in his own palace

How could this happen? As Moctezuma II's power was absolute, only a few nobles could talk to him in person, and an even smaller number actually knew what had taken place. Cortés and La Malinche interrogated the emperor about gold. Cortés then sent raiding parties to the countryside to gather treasure and arrest the nobles. For a time, the Aztec Empire was in his hands.

ACTIVITY 2.25

Working with historical sources

1 **Explain** the reasons Díaz gives for the kidnapping (see Source 2.62).
2 **Explain** what this tells you about the intentions of the conquistadors.
3 Do you think this action was justified in the circumstances? **Explain** your reasons for this answer.
4 **Conduct** further research on the nature of this kidnapping. **Explain** why you think the Aztec Emperor allowed it to happen.

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By April 1520, the governor of Cuba sent a force to Mexico to arrest Cortés for exceeding his mission, and so Cortés left Tenochtitlan to deal with the crisis. In his absence, he left Pedro de Alvarado in charge of Moctezuma II and the city where the situation had become tense.

During the Aztec spring festival of Toxcatl, Alvarado became nervous that the festivities would turn ugly and ordered the massacre of thousands of nobles in a palace courtyard as they sang and danced.

An Aztec account of the incident recalled:

> The blood of the [Aztec] warriors ran like water as they ran, forming pools, which widened, as the smell of blood and entrails fouled the air.
>
> And the Spaniards walked everywhere, searching the communal houses to kill those who were hiding. They ran everywhere, they searched every place.

▲ **Source 2.64** Cited in M. León-Portilla, *The Broken Spears: The Aztec Accounts of the Conquest of Mexico*, 1992

Cortés returned with a larger force in June to a city in full-scale revolt against the Spanish.

Moctezuma II was brought out to speak to the city in an attempt to bring calm. It is claimed he was pelted with rocks and arrows by a furious crowd. The great Moctezuma II died shortly afterwards on 30 June 1520.

ACTIVITY 2.26

Working with historical sources

The Spanish account of the great leader's death stated that he died from wounds he suffered when the Aztecs hurled rocks and arrows at him. However, historians have also argued that when Cortés saw that Moctezuma had lost control and was no longer any use, he murdered him. **Consider** Sources 2.65 to 2.67.

Source A



▲ **Source 2.65** A seventeenth-century oil painting showing the death of Moctezuma at the hands of his own people

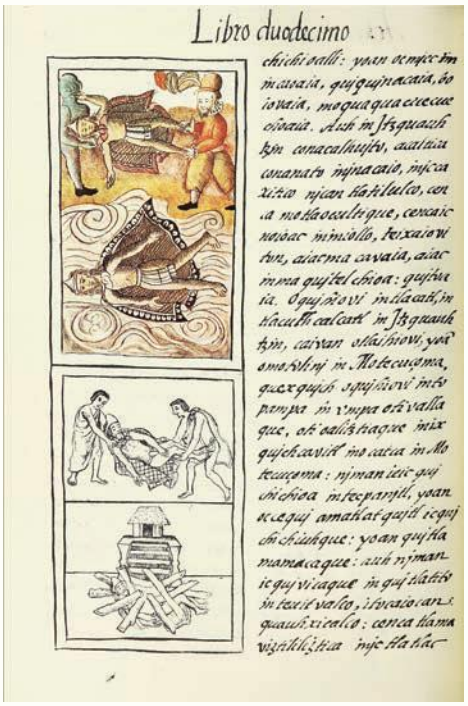
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Source B

They were shouting so loudly that they shook the city, and were sending such a volley of stones, spears and arrows that the sky seemed to rain stones, spears, arrows and darts. Therefore when Moctezuma showed his face a little to speak … there came toward him from among the flying stones one which was round as a ball, and hit him on the forehead as he stood there between the other two, and he fell.

▲ **Source 2.66** A description of Moctezuma appearing before the Aztecs, by Francisco de Aguilar, a conquistador

Source C



► **Source 2.67** This page from the *Florentine Codex* depicts the aftermath of Moctezuma's death. The *Florentine Codex* was a collection of 12 books written by a Spanish Franciscan friar between 1545 and 1590, detailing the history, language and practices of Aztec culture that he had witnessed.

1 **Explain** what Sources A and B claim to be the cause of Moctezuma's death.
2 **Describe** what you can see in Source C. What do the images suggest about the circumstances of Moctezuma's death?

ACTIVITY 2.27
MAKING THINKING VISIBLE

True for who?

Use the Sources 2.65, 2.66 and 2.67 to determine your own understanding of the truth.

1 Discuss: What kind of situation were these claims made in? (Who made it? What were people's interests and goals? What was at stake?)
2 Brainstorm: Make a list of all the different points of view from which you could look at these claims.
3 Dramatise: Choose a viewpoint to embody (it does not have to be one you really believe) and imagine the stance a person from this viewpoint would be likely to take. Would he or she think the claim is true? False? Uncertain? Why?
4 Stand back: Step outside of the circle of viewpoints and take everything into account. What is your conclusion or stance? What new ideas or questions do you have?

THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Empathy.

Your response should contain:

- Language that shows that you understand the values, beliefs, experiences and emotions of people from the past
- Consideration of how these values, beliefs, experiences and emotions align with or differ from your own
- Explanation of how the origin and context of the source may account for similarities or differences with your own experience.

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The massacre of the Spanish

On 30 June, the Spanish attempted to sneak out of the city under the cover of darkness. They were quickly detected and the La Noche Triste, or Night of Sorrows, began. Aztec warriors descended on the escapees, killing many conquistadors and their indigenous allies.

Weighed down by gold, the Spaniards were trapped on the narrow causeways leading out of the city. Many slipped off the edge and drowned in the lake. Cortés, La Malinche, Díaz and a small band of surviving conquistadors reached the safety of Tlaxcalan territory. In their escape, they lost the vast majority of their gold and the men they left behind became human sacrifices.

The siege of Tenochtitlan

Cortés knew he could not return to Spain a failure. Resting in Tlaxcalan territory, he raised a much larger force of Tlaxcalan warriors. In that time, smallpox arrived in Tenochtitlan. The disease had arrived in Cuba in 1507 with the Spanish and was brought to Vera Cruz, and then from the coast, by the Spanish force sent to replace Cortés in 1520. During a 70-day outbreak in Tenochtitlan at the end of 1520, it decimated the city.

Smallpox is a disease that starts in the throat and mouth. Within a few days, large pustules begin to appear all over the victim's skin, and if they burst, become highly infectious. About half the Aztecs infected died.

> It began to spread … striking everywhere in the city and killing a vast number of our people. Sores erupted on our faces, our breasts, our bellies; we were covered with agonizing sores from head to foot. The illness was so dreadful that no one could walk or move. The sick were so utterly helpless that they could only lie on their beds like corpses, unable to move their limbs or even their heads … A great many died from this plague, and many others died of hunger. They could not get up to search for food, and everyone else was too sick to care for them.

▲ **Source 2.68** Cited in Philip Russell, *The Essential History of Mexico: From Pre-Conquest to Present.*

The new Aztec Emperor, Cuauhtémoc, could do little to restore the great city.

Cortés soon returned with a stronger Spanish force, more than 200 000 new indigenous allies and a six-mile-long convoy of boat parts that they assembled and floated onto the lake as battleships loaded with cannons. Cortés lay siege to the great city.

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◄ **Source 2.69** 'The Night of Sorrows', the failed attempt to retreat from Tenochtitlan undetected, cost Cortés nearly a thousand men and severely depleted their supplies.

The Aztecs held out for 85 days. Despite starvation and disease, they made a point of sacrificing captured Spanish soldiers in full view of their enemy. They forced the conquistadors and their allies to fight for every inch of ground. The new Aztec Emperor, Cuauhtémoc, had personally led the resistance but was captured trying to escape the city.

On 13 August 1521, the city of Tenochtitlan, the centre of the great Aztec Empire, was captured by the Spanish. It is estimated that around 240 000 Aztecs were killed by fighting, starvation or disease. Roughly 1000 Spanish conquistadors were killed taking a city that was once noted for its floating gardens, bustling markets and gleaming temples. Now it was devastated by war. Cuauhtémoc was tortured by the Spanish to reveal the location of more gold and treasure. He revealed nothing and was killed.



▲ **Source 2.70** Image from the *Florentine Codex* showing Aztec people dying of smallpox brought by the Spanish to Tenochtitlan.

How can we save our homes, my people? The Aztecs are deserting the city: the city is in flames, and all is darkness and destruction.

▲ **Source 2.71** An anonymous Aztec poet laments the fall of Tenochtitlan.

The end of the Aztecs

The Spanish immediately began dismantling the city and replacing it with European buildings, naming it Mexico City. The lake and marshes around the city were drained. Almost all traces of Aztec civilisation became hidden under the Spanish roads and structures for hundreds of years. Hundreds of thousands of Aztecs were converted to Christianity, and many churches were built by their new Spanish rulers as they

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sought to remove all traces of the Aztec culture. Hernán Cortés was named governor of New Spain in 1522.

Cortés's lust for gold never left him. He led further explorations in Honduras and into the north, founding and naming a new territory: California.

How should we remember Hernan Cortes?

Historians have long debated the role of Cortés. Was he a heroic explorer who brought Christianity to the New World or a villain only interested in blood, conquest and gold? Explore these interpretations of the explorer to gain an understanding of Cortés.

Francisco Lopez de Gomara was a Spanish historian who lived during the time of Cortés and recorded a history of the Spanish conquest of the Americas.

> The Conquest of Mexico and the conversion of the peoples of New Spain can and should be included among the histories of the world, not only because it was well done but because it was very great … Long live, then, the name and memory of him [Cortés] who conquered so vast a land, converted such a multitude of men, cast down so many idols, and put an end to so much sacrifice and the eating of human flesh!

▲ **Source 2.72** Francisco Lopez de Gomara (1552)



▲ **Source 2.73** This painting was made of Cortés around the 1850s and depicts one perspective of Cortés.

ACTIVITY 2.28
MAKING THINKING VISIBLE

Stop, look, listen

1. Stop: What do Sources 2.72 and 2.73 'say' about Cortés?
2. Look: Research and find another image or a quote about the Spanish explorer. What have others said about him?
3. Listen: Hear what the sources tell you with an open mind. What opinion have you formed about Cortés?

The memory of Cortés today is controversial. In some areas, he is seen as the founder of modern Mexico; in others, he was a thief and La Malinche is a betrayer of her people.

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▲ **Source 2.74** A sculpture of Hernán Cortés alongside La Malinche. This image shows a sculpture erected in a suburban park in Mexico City in 1982. It depicts Hernán Cortés alongside La Malinche. In the foreground is their son, Martin. The son is remembered by many to be the 'first Mexican'. The statue is called 'Monumento al Mestizaje': a memorial to Mexico's mixed Spanish and indigenous roots. Such is the division over La Malinche's role in Mexico's past that violent protests erupted, and the statue had to be removed to a more secluded location.

ACTIVITY 2.29 RESPONDING TO THE SOURCE

1 **Describe** what you see in the sculpture in Source 2.74.

2 **Explain** the perspective or memory of Cortés and La Malinche that the sculpture is trying to create.

3 The sculpture and the public reaction to it came 500 years after the conquest of Mexico. **Explain** what this tells you about the way some modern Mexicans view La Malinche.

THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Perspectives.

Your response should contain:

- A clear identification of the source's perspective
- Evidence from the source to demonstrate this perspective (note, this may include implied meaning)
- Discussion of how the source's origin or context may account for this perspective
- Discussion of how this perspective compares to other perspectives (in questions that use more than one source)
- Consideration of how this source's perspective is useful in responding to the question.

REFLECTING ON YOUR LEARNING 2.4

Reflect on what you have learned in this section:

1 Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the question: 'What was the nature of the interaction between Cortés and the Aztecs?'

2 **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'How did the arrival of the Spanish from 1492 change the Americas?'

Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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2

2.5 How did the Spanish conquest change the course of life in the Americas and the wider world?

FOCUS QUESTIONS

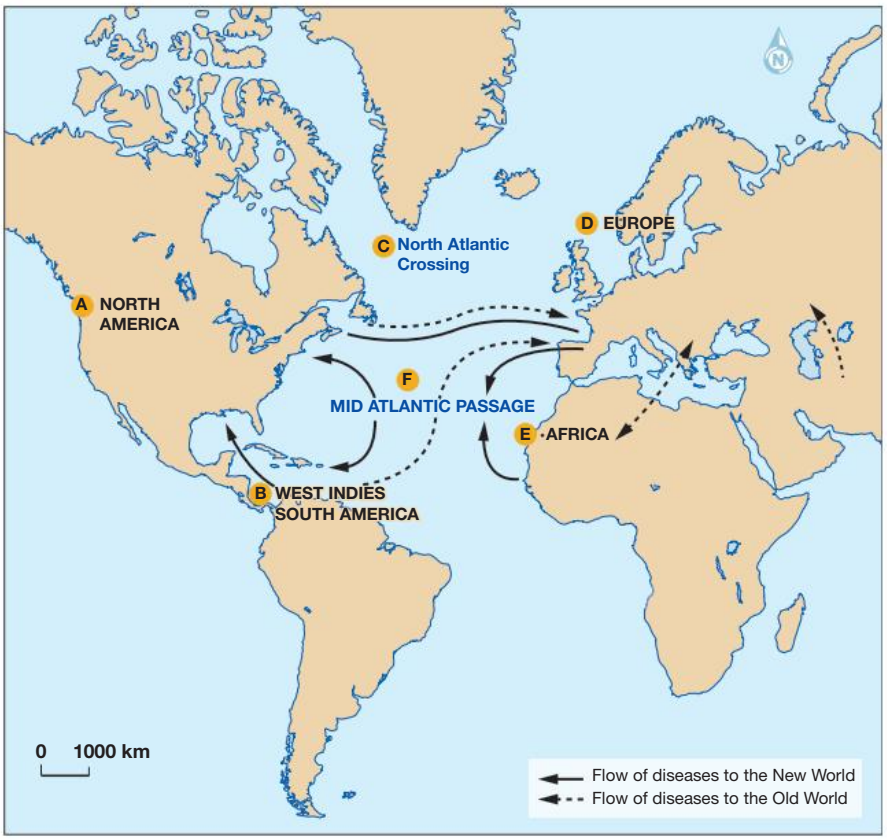
- What was the short-term impact of the Spanish conquest of the Americas?
- What were the longer-term impacts of the Spanish conquest of the Americas?

Disease

In north, central and south America, the arrival of Christopher Columbus was devastating. Smallpox was contracted by millions of people. Its effects were visible, horrific and painful. Other diseases were soon to follow, such as influenza, the measles and other European ailments that wrought havoc on local populations who had no immunity to the new diseases.

When Cortés and his conquistadors arrived in 1519, more than 30 million people were living in modern-day Mexico. One hundred years later, it is estimated only around 1.5 to three million indigenous people had survived.

▼ **Source 2.75** This map shows how diseases were spread by new interactions between peoples from different parts of the world. On the right are lists of infectious diseases originating on each continent.



A NORTH AMERICA
Introduction of 'new' diseases
- Smallpox
- Measles
- Yellow fever
- Respiratory infections
- Falciparum malaria
- Throat diseases
- Vivax malaria.

B WEST INDIES SOUTH AMERICA
New tropical disease environment
- Fever
- Yellow fever
- Smallpox
- Leprosy
- Syphilis
- Falciparum malaria.

C North Atlantic Crossing
'Melting pot' of diseases contracted onboard ship

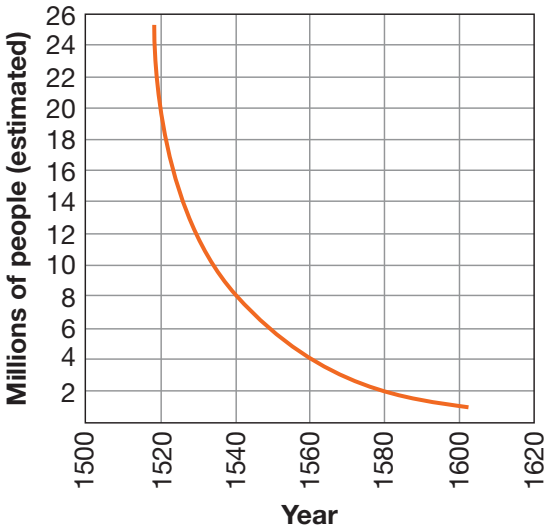
D EUROPE
Old temperate and Mediterranean disease environment
Endemic and epidemic disease pool
- Smallpox
- Plague
- Fevers
- Malaria
- Measles
- Respiratory infections.

E AFRICA
Old tropical disease environment
Endemic and epidemic disease pool
- Smallpox
- Leprosy
- Yaws
- Falciparum malaria
- Yellow fever
- Fevers.

F Mid Atlantic Passage
From the start of the sixteenth century, millions of West Africans were forcibly transported to the west Indies as part of the triangular trade

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The impact of smallpox was greater than any damage an explorer or European army could have hoped to achieve. While it is easily argued that the Spanish had better fighting technologies, the disease made fighting and maintaining an empire, for both the Aztecs and Inca, nearly impossible.



▲ **Source 2.76** Estimated change in the indigenous population of Central Mexico

Indigenous populations

Those who survived the epidemics of disease and Spanish weapons were left to be ruled by an overseas monarch. Tenochtitlan, the centre of Aztec life, was completely destroyed by the Spanish and rebuilt to become Mexico City.

For many, their memories of Aztec life were soon to fade as a new life under European Christianity was put in its place. Inca civilisation in South America was also washed away as the large empire was divided up among the conquerors who then spent years fighting bitterly among themselves over the spoils.

Churches replaced temples all across the Americas and a variety of gods and complex systems of worship were replaced with the one god and traditions of Christianity.

For the indigenous people, many were forced to work for their new masters and life as they knew it would never be the same. As a reward for their efforts, conquistadors were promised an *encomienda* or 'reward' of local indigenous labour and access to land.

hacienda large estate of land

For Spaniards who could not find wealth, fame or nobility in their homeland, this was a fine prize. For Aztecs, it was a small step above slavery. While they were technically free, they were 'obligated' to work for the *encomiendero* in return for religious instruction. Most conquistadors used these rewards to build **haciendas** to farm lucrative crops like tobacco and sugar, mine gold and silver and become extremely wealthy. It quickly became a corrupt system and in 1550 the Spanish monarchy tried to grant Aztecs more rights; however, much of this labour was simply replaced by African slaves.



▲ **Source 2.77** An engraving created in 1754 showing Spanish conquistador Hernando de Soto and his men torturing the indigenous people of Florida in 1540 in their quest to find gold.

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ACTIVITY 2.30
RESPONDING TO THE SOURCE

1 Although the creator of the 1754 engraving in Source 2.77 is unknown, **describe** the purpose you think he had in creating this image.
2 **Determine** whether Source 2.77 tends to corroborate or contradict other evidence you have reviewed in this topic.

REMEMBERING INDIGENOUS CULTURES

The indigenous cultures of Mesoamerica never truly recovered from the arrival of Cortés, yet their languages survived. To help convert the indigenous population to Christianity, Cortés ordered the Catholic priests to record the local languages. Otomi, Matlalzinca, Totonac, Zapotec and Nahuatl were preserved and, in many regions of Mexico, are still spoken today.

THE INCAS IN PERU

Following Spanish conquistador Francisco Pizzaro's conquest (1528–1572) of the Inca Empire in modern-day Peru and across the Andes mountains, tribal culture and language survived. Owing mostly to the difficult geography, many groups were able to continue to live their traditional lifestyles.

Despite the obvious influence of the Spanish in language, religion and architecture, Peruvians link their identity to a time before the conquistadors. New presidents are inaugurated at Machu Picchu, the iconic fifteenth-century Inca citadel. The statue of the first conquistador, Francisco Pizarro, was removed from Lima's main square in 2003.

Gold taken to Europe

The gold taken by Cortés and other conquistadors was by no means the entire supply. For the following centuries, the Spanish dug up or stole gold and silver from the Americas, melted it down and sent it back to the Spanish Crown, who became immensely rich and one of the most powerful monarchies in Europe.

However, not all of it made it to Spain.

French Pirate Jean Fleury stole two of the three golden shiploads Cortés sent in tribute to the king, and in 2018 marine explorers found a Spanish galleon at the bottom of the ocean, with the modern-day equivalent of $13 billion in gold and jewels taken from South America.

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Enduring Spanish influence

Across the length of Central and South America, Spanish is the dominant language (except Brazil, which was conquered by Portugal) and Roman Catholic Christianity is the dominant religion.

The goals of Columbus, Cortés, Pizarro and others were to find wealth, land and gold. However, their secondary goal of converting millions to Christianity has had enduring success. The region commonly known as Latin America is home to more than 425 million Catholics – nearly 40 per cent of the world's total Catholic population. A quick look at a map of major city names across the region gives a strong indication of the spread of Spanish influence.



▲ **Source 2.78** Mexico, the Caribbean islands, and Central and South America

ACTIVITY 2.31 RESPONDING TO THE SOURCE

Examine the map in Source 2.78 and **use** Google Maps to **identify** the names of capital cities in the countries it shows. **Explain** what this tells you about the extent of the Spanish conquest.

Rebellion and freedom

Spanish rule was fought and defeated across Latin America in the eighteenth and nineteenth centuries. In the tradition of Enlightenment thinkers and the American Revolution (1776) and the French Revolution (1789), one by one Latin American nations fought off Spanish rule.

By 1826, an army led by the indigenous-born Simón Bolívar liberated Bolivia, Colombia and northern Peru from Spanish rule. These armies were made up of a population of mixed Spanish and indigenous heritage, who rejected the long-standing tradition of wealthy Spanish citizens ruling at the expense of the poor.

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▲ **Source 2.79** A statue dedicated to Simón Bolívar, a Venezuelan war hero and military leader in Columbia

In Mexico, the road to independence was long and aided by a French invasion of Spain in 1807. After resistance rose in 1810, a war of independence from the Spanish was won by local armies and the independence of Mexico was declared on 21 August 1821 in the Treaty of Córdoba.

Traditions still alive: Day of the Dead

Christianity took hold in Latin America and its traditions are celebrated with as much, if not more, enthusiasm than anywhere else in the world. However, many indigenous traditions also survived and wove their way into those introduced by the Spanish. *Dia de los Muertos* (Day of the Dead) is celebrated on the Christian All Souls Day on 1 November; however, it aligns with an Aztec tradition that took place at the same time that celebrated the lives of the dead.



▲ **Source 2.80** Parade for Mexico's annual Day of the Dead

Known for its vibrant costumes and make-up, the celebration is a combination of Aztec and Spanish iconography. In Peru, the Inca new year is still vigorously celebrated as *Inti Raymi* (Sun Festival) in the centre of Cusco to preserve ancient traditions and keep the memory of the great empire alive.

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ACTIVITY 2.32

Continuity and change

Historians look at events and patterns from the past to identify how life has stayed the same and how it has changed. **Use** the information in this section to help you respond to this task.

1 **Create** a list of the changes that occurred in Mexico after the Spanish victory in 1521. **Sequence** them from most significant to least significant.

2 **Create** a list of the things that stayed the same (continuities) that occurred in Mexico after the Spanish victory in 1521. **Sequence** them from most significant to least significant.

3 **Compare** your lists with a partner, and then share with the class.

4 **Explain** how these lists help you understand the impact of the Spanish conquest of the Americas.

THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Change and continuity.

Your response should contain:

- A clear statement about what stayed the same and/or what changed
- Corroborating evidence or examples that show how things stayed the same (i.e. continuity)
- Differing evidence or examples that demonstrate how things changed
- A reason that accounts for this continuity and/or change.

REFLECTING ON YOUR LEARNING 2.5

Reflect on what you have learned in this section:

1 Based on the information and sources you have encountered in this section, either **create** a mind map or write a short response of 5–10 sentences to **summarise** what you have learned and to answer the question: 'How did the arrival of the Spanish change the course of life in the Americas and the wider world?

2 **Explain** how the information and sources in this section contribute to answering your overall inquiry question: 'How did the arrival of the Spanish from 1492 change the Americas and the wider world?'

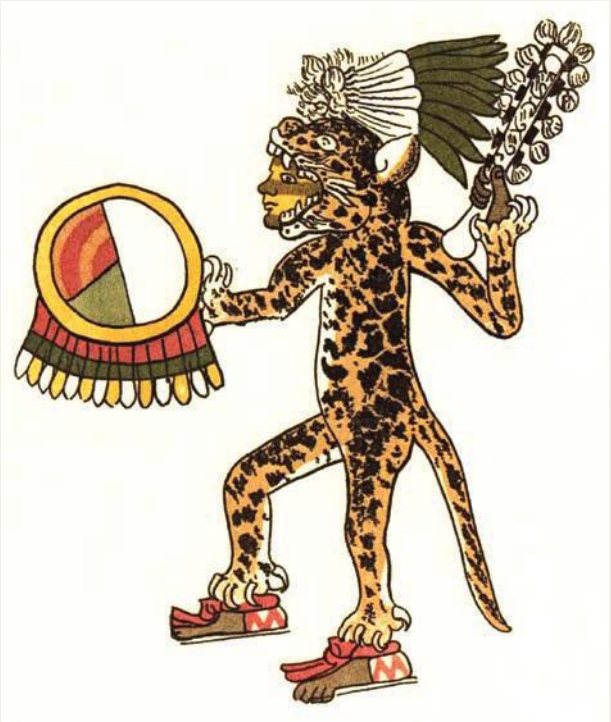
Complete the Quiz and the 'Developing your understanding' questions in the Interactive Textbook.

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Conclusion: end-of-chapter reflection

Why does it matter today?

The Spanish conquest of the Americas is a fascinating study of adventure, faith and greed.



▲ **Source 2.81** An image of a Jaguar Warrior (an elite member of the Aztec military) as depicted in the *Aztec Codex Magliabechiano*, created in the mid-sixteenth century

Do you remember being asked at the beginning of Chapter 2 to think about the possibility of an alien invasion of Australia, from both your own perspective, as well as that of the aliens?

We can only imagine the thoughts running through the minds of Cortés and his men as they first set foot in Tenochtitlan. Similarly, the imagination of the Aztec Empire could never have stretched to conceive such visitors to their world – despite the supposed prophecies.

We study the Spanish conquest to examine the effect of two great civilisations meeting for the first time. The impact of disease and war led to the destruction of a great and unique civilisation that was almost lost to time. However, today we celebrate the culture that still lives and look back on a cautionary tale of Spanish **colonisation** and one man's lust for fortune and fame.

colonisation act, by a militarily strong country, of invading and taking over of another area, which then becomes known as a colony

Reflection

STEP ONE: REFLECT ON YOUR SUB-QUESTIONS

At the end of each section of this chapter, you were asked to reflect on how the information in the section related to the overall inquiry question:

'How did the arrival of the Spanish from 1492 change the Americas and the wider world?'

For each of the sub-questions below, write a brief response (approximately two to three sentences) to the sub-question. Do you feel that you have a good understanding of each section of this chapter?

- What was life like for the Taíno peoples of the Caribbean before Europeans arrived?

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- What was the nature of the interaction between Columbus and the Taino people he encountered?
- How should we remember Christopher Columbus?
- How did Columbus change the course of life in the Americas?
- What was life like for the Aztecs before Europeans arrived?
- What was the nature of the interaction between the Spanish and the Aztecs?
- How should we remember Hernan Cortes?
- How did Cortes change the course of life in the Americas?

(If you prefer a visual approach, you could do this as a mind map instead.)

STEP TWO: REFLECT ON THE KEY INQUIRY QUESTION

Now, based on what you have learned in this chapter, write a short paragraph in response to the question: 'How did the arrival of the Spanish from 1492 change the Americas and the wider world?'

STEP THREE: FUTURE QUESTIONS

- Based on your learning in this chapter, what questions do you have about American history?
- **Reflect on** the questions you or your classmates raised at the beginning of the chapter at the end of the 'Setting the scene' activities. Have you answered most of these questions? Which questions have not been answered?

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End-of-chapter assessment

1 Making thinking visible

Circle of viewpoints

The circle-of-viewpoints routine helps you consider different and diverse perspectives involved in and around the Spanish conquest of the Americas. Understanding that people may think and feel differently about things is a key aspect of understanding history.

As you consider this topic from a range of viewpoints, put yourself in the person's shoes and think about the following questions:

- How does it look from different points in space and different points in time?
- Who (and what) is affected by it?
- Who is involved?
- Who might care?

1A I am thinking of Aztec society and human sacrifice from the point of view of Moctezuma II.

1B I think …

1C A question I have from Moctezuma's viewpoint is …

2A I am thinking of spreading Christianity to the New World from the point of view of Hernán Cortés.

2B I think …

2C A question I have from Cortés's viewpoint is …

3A I am thinking of the arrival of the Spanish from the point of view of La Malinche.

3B I think …

3C A question I have from La Malinche's viewpoint is …

4A I am thinking of the massacre of the Spanish at Tenochtitlan during the Night of Sorrows from the point of view of Bernal Díaz.

4B I think …

4C A question I have from Díaz's viewpoint is …

5A I am thinking of the defeat of the Aztecs from the point of view of a citizen of Tenochtitlan.

5B I think …

5C A question I have from this person's viewpoint is …

Wrap up: What new ideas do you have about the topic that you did not have before? What new questions do you have?

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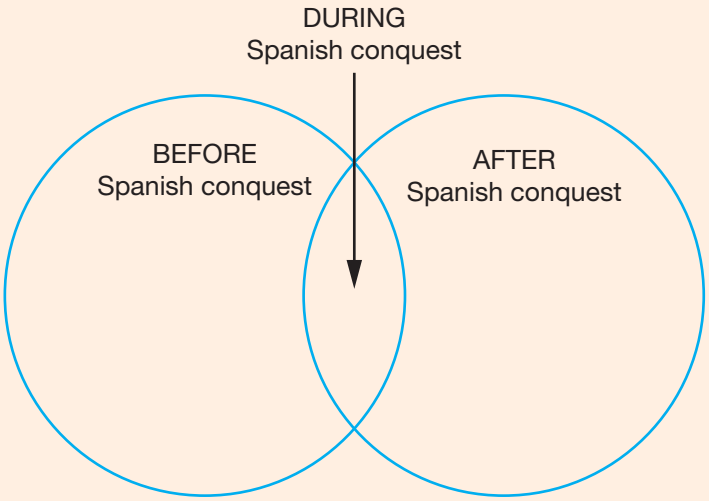
2 Research task

Analysing continuity and change

Step 1: **Create** a Venn diagram

Compare the impact on before versus after the Spanish Conquest on the topics of:

- work and life
- social structure
- religion
- wealth
- health and population
- food.



Step 2: Write a paragraph in response to each of the following questions, using the information in your Venn diagram.

1 **Identify** the elements of Aztec life that continued.
2 **Identify** the elements of Aztec life that changed.
3 In your opinion, **describe** how significant the arrival of Cortés was in 1519. Use evidence in your response.

3 Class debate/trial

The People versus Hernán Cortés

Historical significance: How should we remember Hernán Cortés?

Here now / There then: Was Moctezuma right to accept Cortés?

1 For centuries, historians claimed that Moctezuma allowed Cortés to conquer the Aztecs because he believed him to be a god and was too weak to stop the Spanish. However, recent debate has suggested that this was not the case and placed much of the blame on Cortés and conquistador greed.

Copy and complete the table below. **Compare** the perspectives on Moctezuma's contribution to the destruction of his empire:

Column A	Column B
Consider how perspectives on this topic have changed. What are the present views on this topic? How do we judge Moctezuma's actions now? How have modern views changed the way we think about the conquest?	Imagine you could travel back to a time when the attitudes about this topic were different. Why would Moctezuma II be to blame? How did the Spanish history record the conquest?



THINKING DEEPER HISTORICAL CONCEPTS

Did you know you are engaging in conceptual thinking? The historical concept in this question is Significance.

Your response should contain:

- Identification of what elements are significant in relation to the content of the question
- A clear statement about the degree of significance (i.e. very significant, somewhat significant)
- Evidence from the sources to support this judgement of significance.

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2 **Compare** the past and present perspectives in Columns A and B. **Explain** why you think things have changed. **Explain** why people in the past think differently from the way we think today.
3 **Explain** how we could find out more about the way people thought back then. **Consider** what will help us understand.

Imagine you are in a court and Hernán Cortés is on trial for the conquest of the Aztecs. **Consider** the following statements for and against his 'guilt' and consider your verdict.

The charges

Conspiracy: The Spanish came stating they were looking for trade, but Cortés privately intended to conquer the Aztecs.

Kidnapping: Moctezuma II was kidnapped and held as a 'puppet' ruler to control Tenochtitlan.

Theft: The Spanish helped themselves to the riches of the Aztec Empire.

War crimes: you might also consider whether any war crimes were committed by either side. See https://cambridge.edu.au/redirect/9594 for an overview of war crimes tribunals in the twentieth century.

The case for	The case against
Conspiracy: Cortés had simply wished to spread Christianity to the Aztec and explain the evils of the Aztec way of life, as he claimed before the massacre of Cholula. Nothing more, nothing less.	**Conspiracy:** The conquistadors lusted for gold 'like monkeys' and Cortés admitted it to the Aztecs. Cortés scuttled his own ships. He, La Malinche and the Tlaxcalans wanted the destruction of the Aztecs.
Kidnapping: Bernal Díaz claimed that they were under threat in Tenochtitlan, and they kidnapped Moctezuma to preserve their own lives. The kidnapping of Moctezuma was a matter of life and death for the Spanish.	**Kidnapping:** Cortés and the conquistadors had only been in Tenochtitlan for a few days before the kidnapping. La Malinche and the Tlaxcalans had warned them they would be killed if they did not act fast.
Theft: Moctezuma II and the Aztec Empire had been defeated fairly in the conquest of their empire. The gold taken by the Spanish was little more than the 'spoils of war'.	**Theft:** Cortés and his men helped themselves to gold and treasure whenever they could. They went as far as torturing the last Aztec emperor, Cuauhtémoc, to attempt to find whatever gold was still to be stolen.

The trial

Break into groups of four:

- One person takes the role of the prosecution.
- One person takes the role of defence.
- Two people take the role of the jury.

Step one: The prosecution must look back across the chapter and conduct further research to gather quotes and evidence to suggest that Cortés is guilty of all charges.

Step two: The defence must look back across the chapter and conduct further research to gather quotes and evidence to suggest that Cortés is innocent of all charges.

Step three: The jury should carefully examine all the evidence presented by both sides and come to a decision on all three charges.

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Step four: Once you have decided on your verdict, the juries of the class must get together to discuss their rulings with the whole class.

1 How many jurors came up with a guilty verdict?
2 How many jurors came up with an innocent verdict?
3 **Describe** the deciding evidence in each case.
4 **Explain** how it reinforces or changes your own verdict on Cortés. **Use** evidence in your response.

4 Research task

Significance

Key inquiry question:

'What is the significance of the study of the Spanish conquest of the Americas in helping us understand Australia's own story of colonisation and dispossession?'

Research the Frontier Wars in Australia from 1788 to the early 1900s, particularly in Queensland. **Compare** the similarities and differences between the conquest of the Americas and the Frontier Wars in Australia in a table.

Similarities between the conquest of the Americas and the Frontier Wars in Australia	Differences between the conquest of the Americas and the Frontier Wars in Australia

Describe how your understanding of the Spanish conquest helps you to understand the experience of the Aboriginal and Torres Strait Islander Peoples of Australia.

Digital resources

Visit the Interactive Textbook or Online Teaching Suite to access:

- General Capability Project
- Interactive chapter Quiz
- Interactive Scorcher Quiz
- Videos, image galleries and other extra materials.



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