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HUMANITIES ALIVE

VICTORIAN CURRICULUM v2.0

VICTORIAN CURRICULUM

THIRD EDITION

8

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This suite of resources may include references to (including names, images, footage or voices of) people of Aboriginal and/or Torres Strait Islander heritage who are deceased. These images and references have been included to help Australian students from all cultural backgrounds develop a better understanding of Aboriginal and Torres Strait Islander Peoples' history, culture and lived experience.

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The publisher acknowledges ongoing discussions related to gender-based population data. At the time of publishing, there was insufficient data available to allow for the meaningful analysis of trends and patterns to broaden our discussion of demographics beyond male and female gender identification.

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Meet our author team

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Robert specialises in History and Economic History, serving at several schools as a teacher and Head Teacher of History. Robert is now a highly respected full-time author who has written History resources for multiple publishers and several key Jacaranda Wiley titles.

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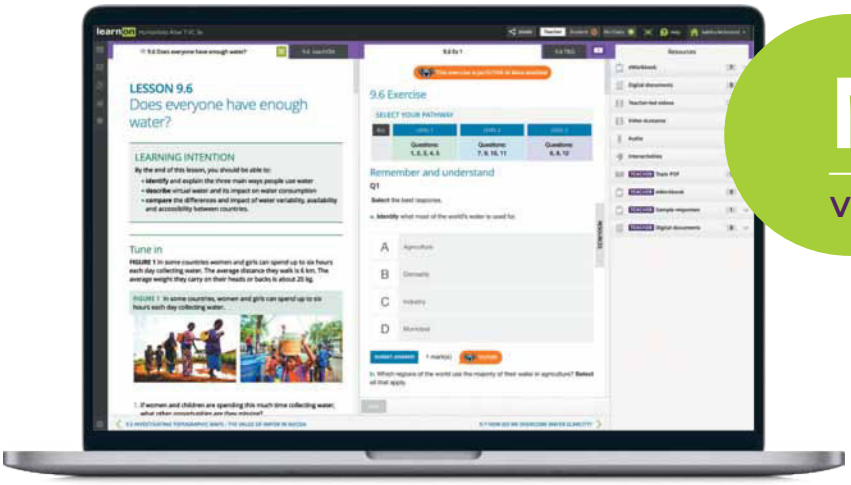
About this resource



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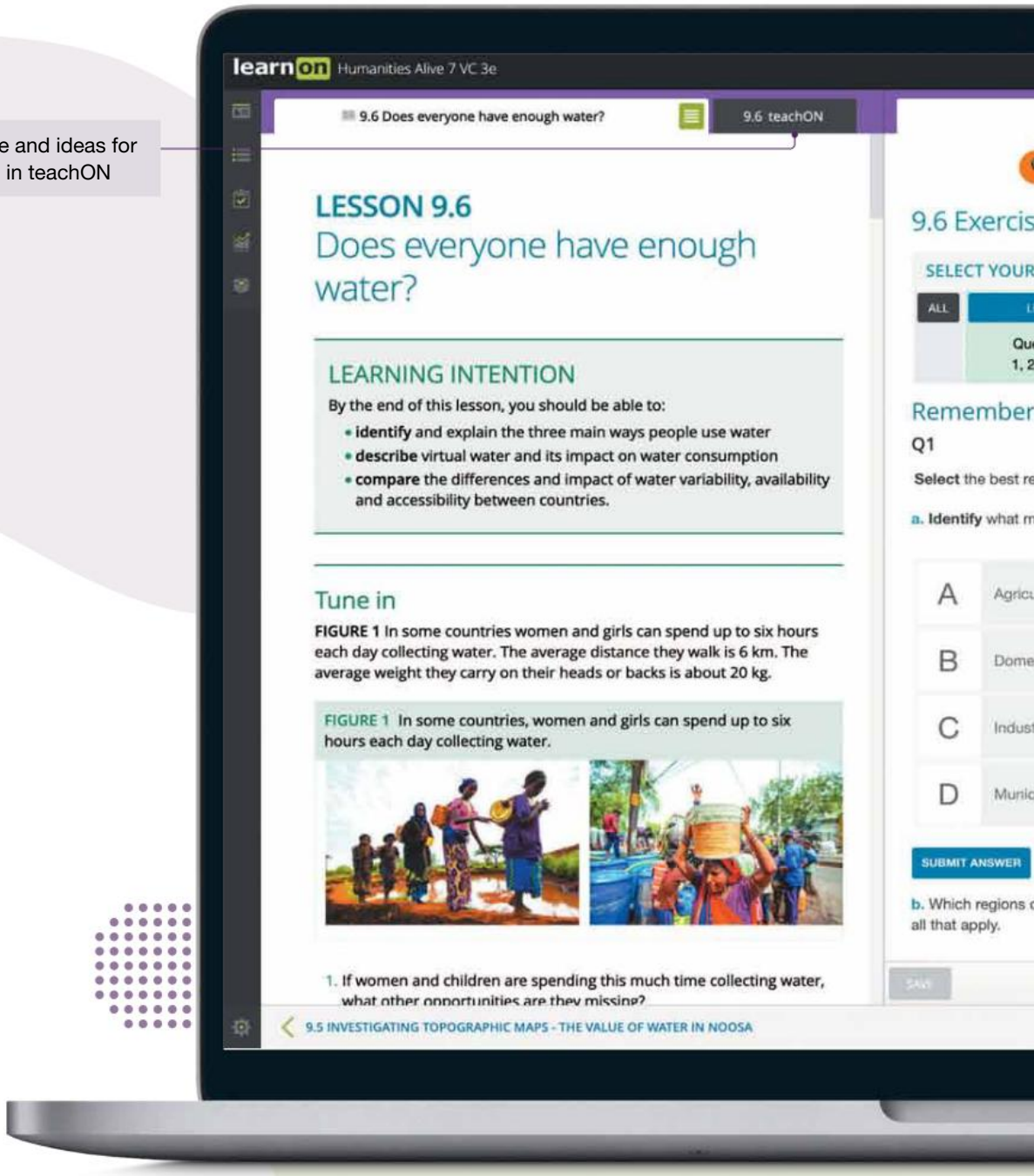

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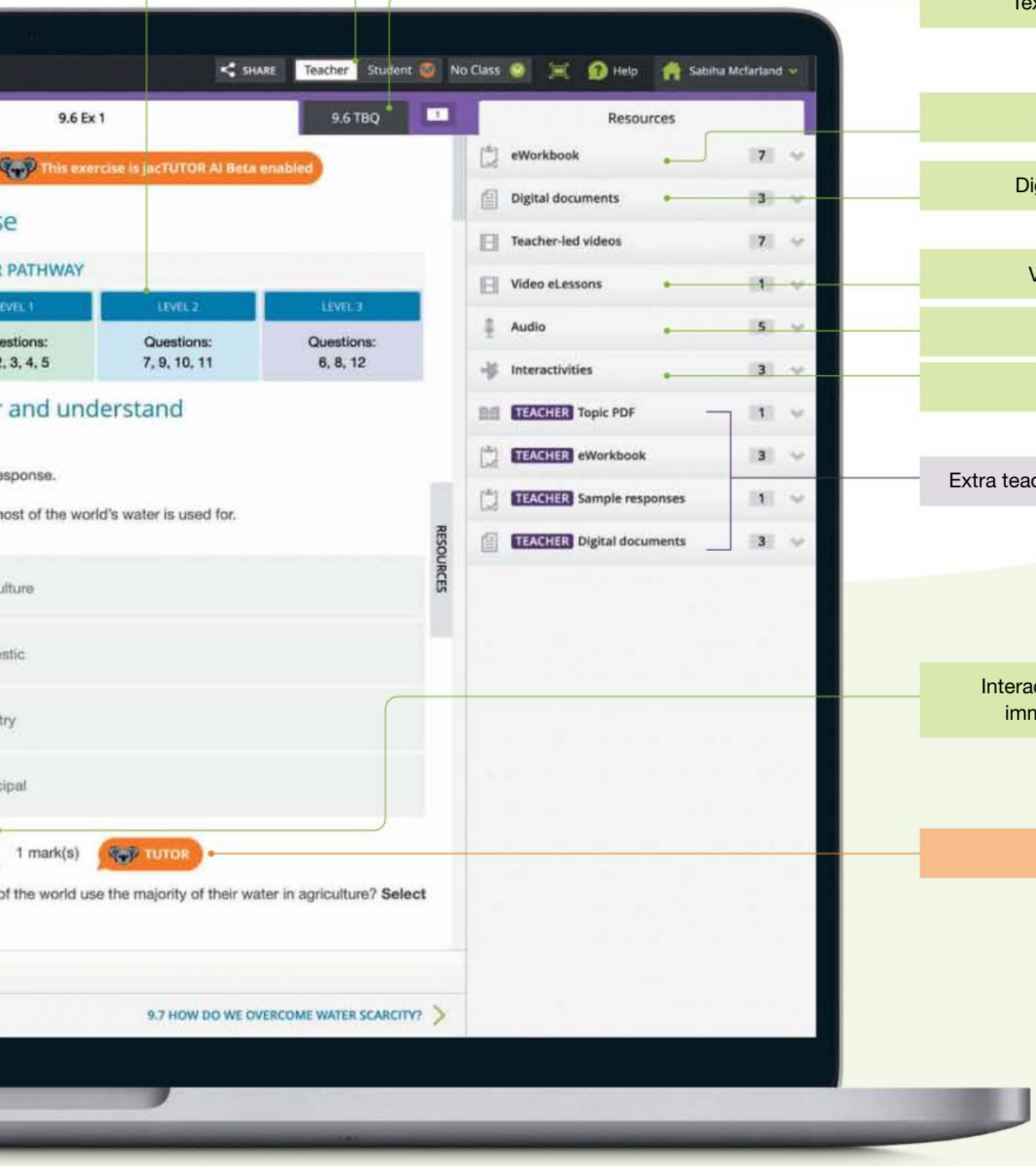

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jacTUTOR

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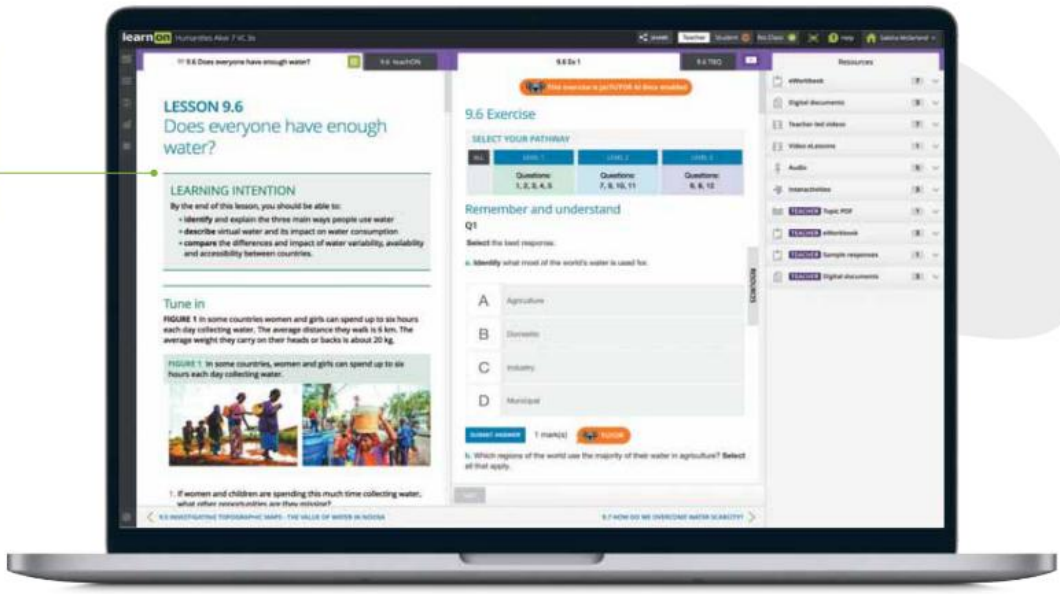

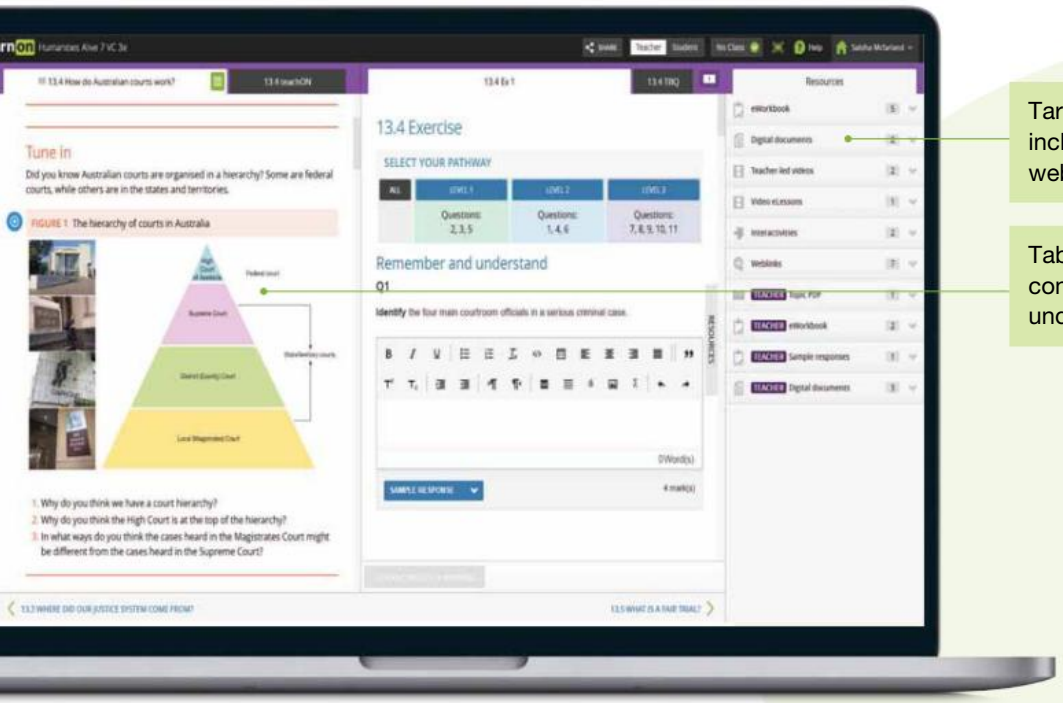

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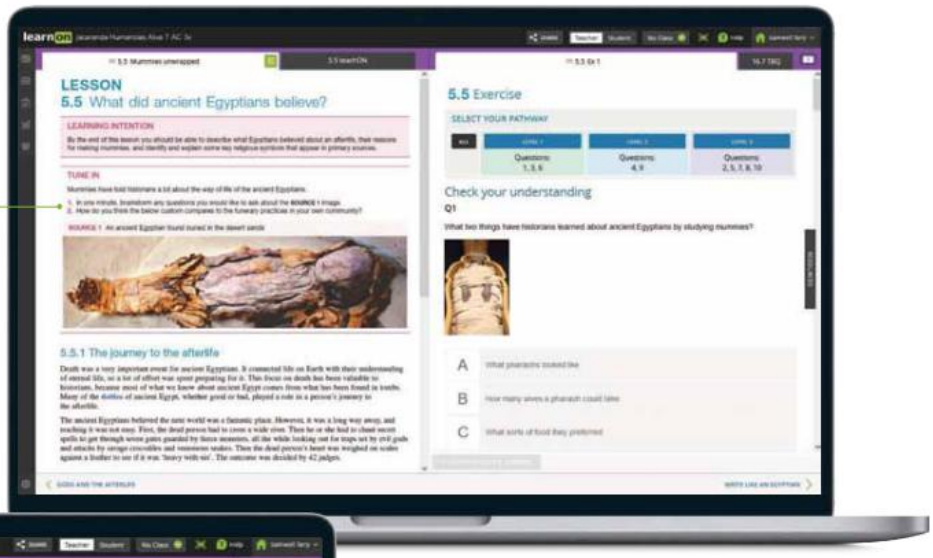

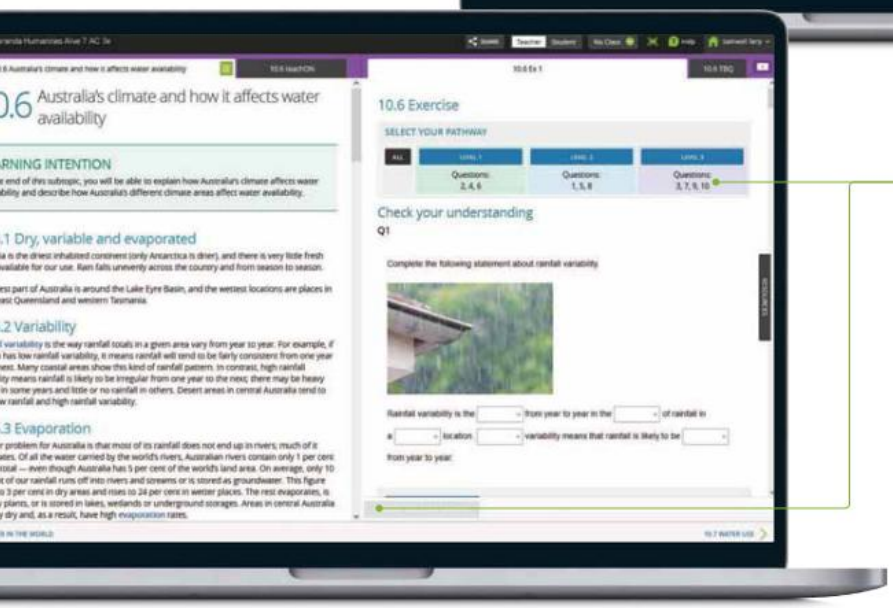

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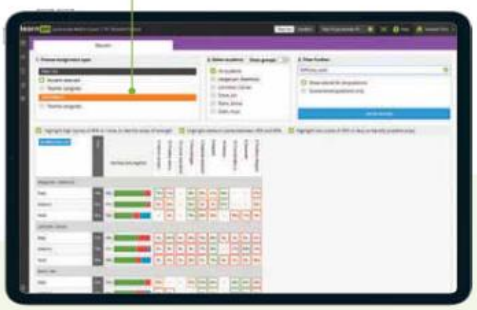

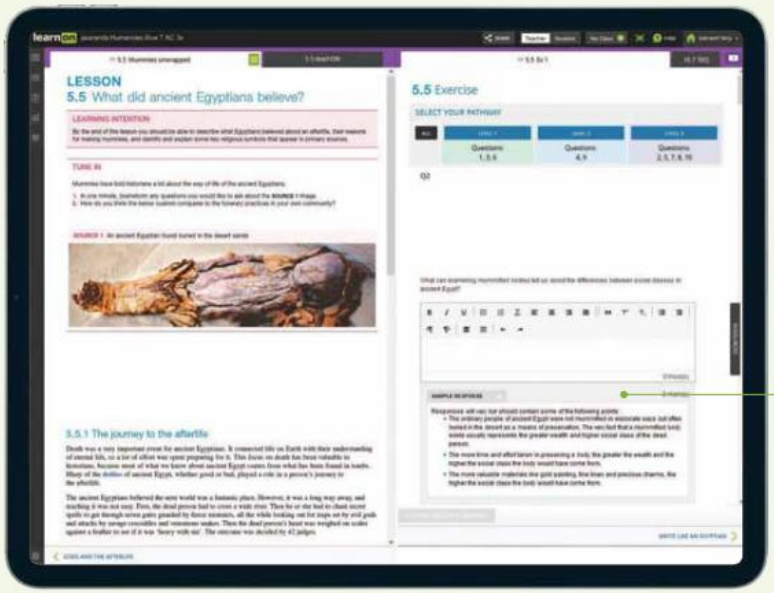

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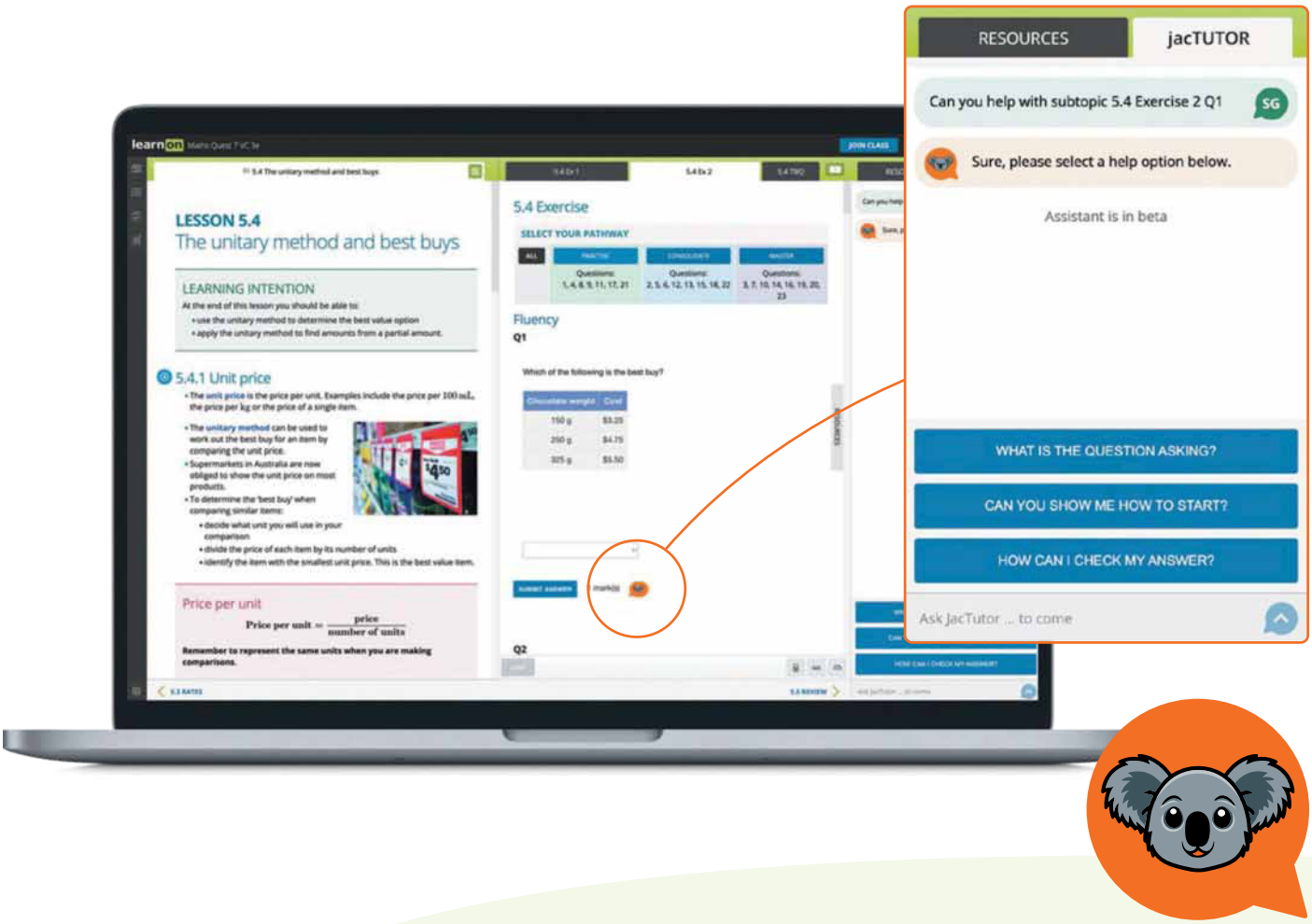

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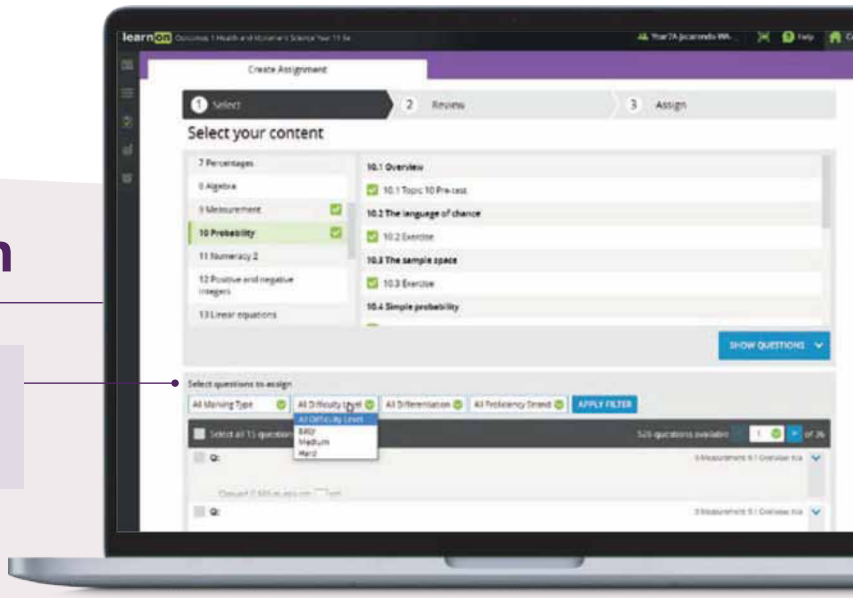

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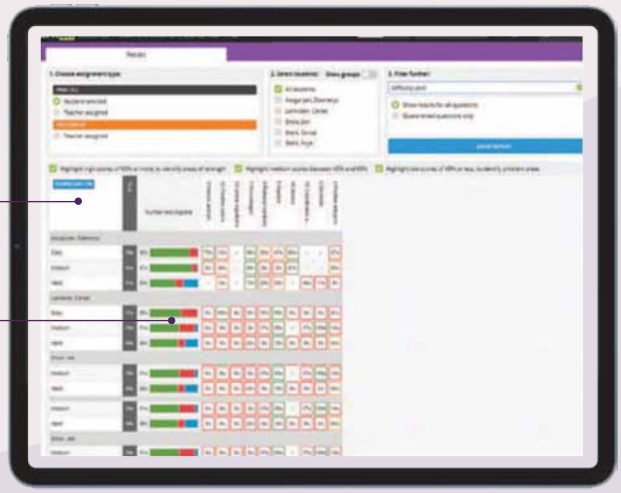

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1 Historical concepts and skills

LESSON SEQUENCE

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LESSON 1.1 Overview

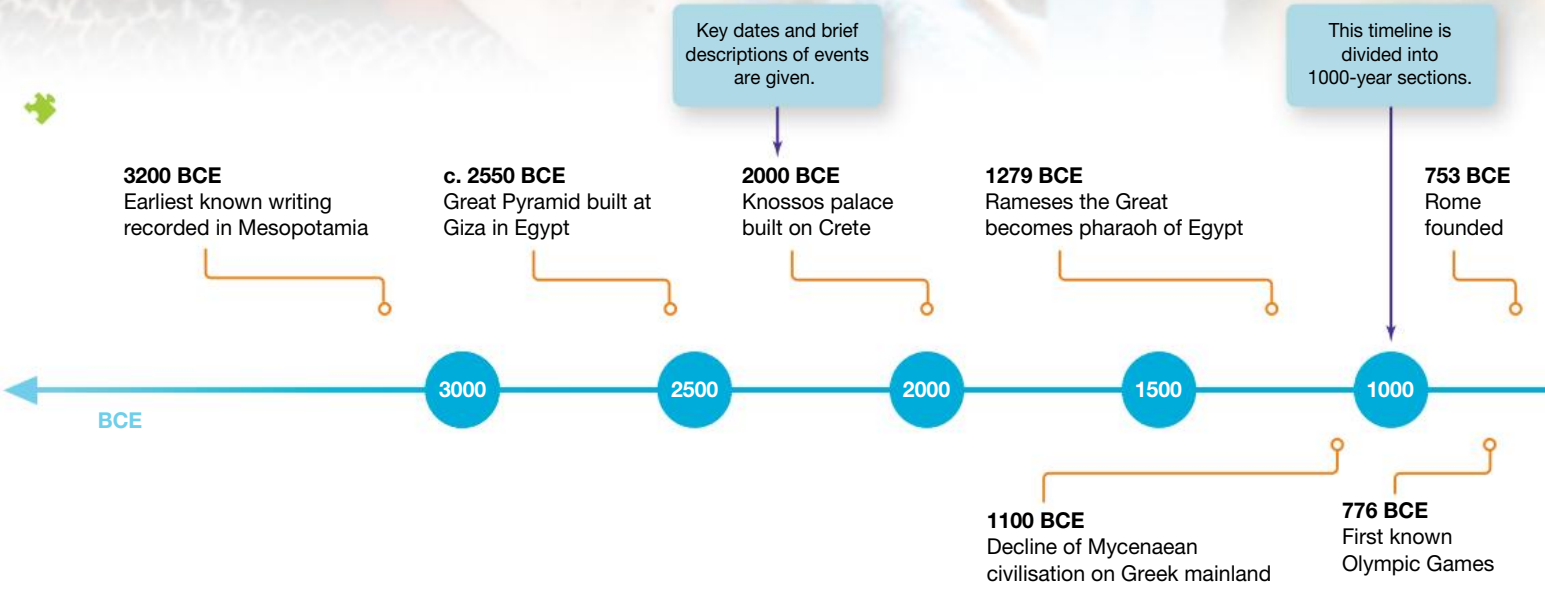
INQUIRY QUESTION

Why are Europe, the Mediterranean world, the Americas, Asia and the Pacific region important to study, and what skills do I need to understand this history?

The period from 600 to 1750 CE shaped modern society. It witnessed the rise and fall of empires, the spread of religions and cultural evolution. The Vikings emerged as influential seafarers and warriors, impacting Europe and the Mediterranean through raids and interactions. Education spread through monasteries and universities. The Age of Exploration brought advancements in art, science and technology and led to the discovery of new lands and trade routes.

learnon

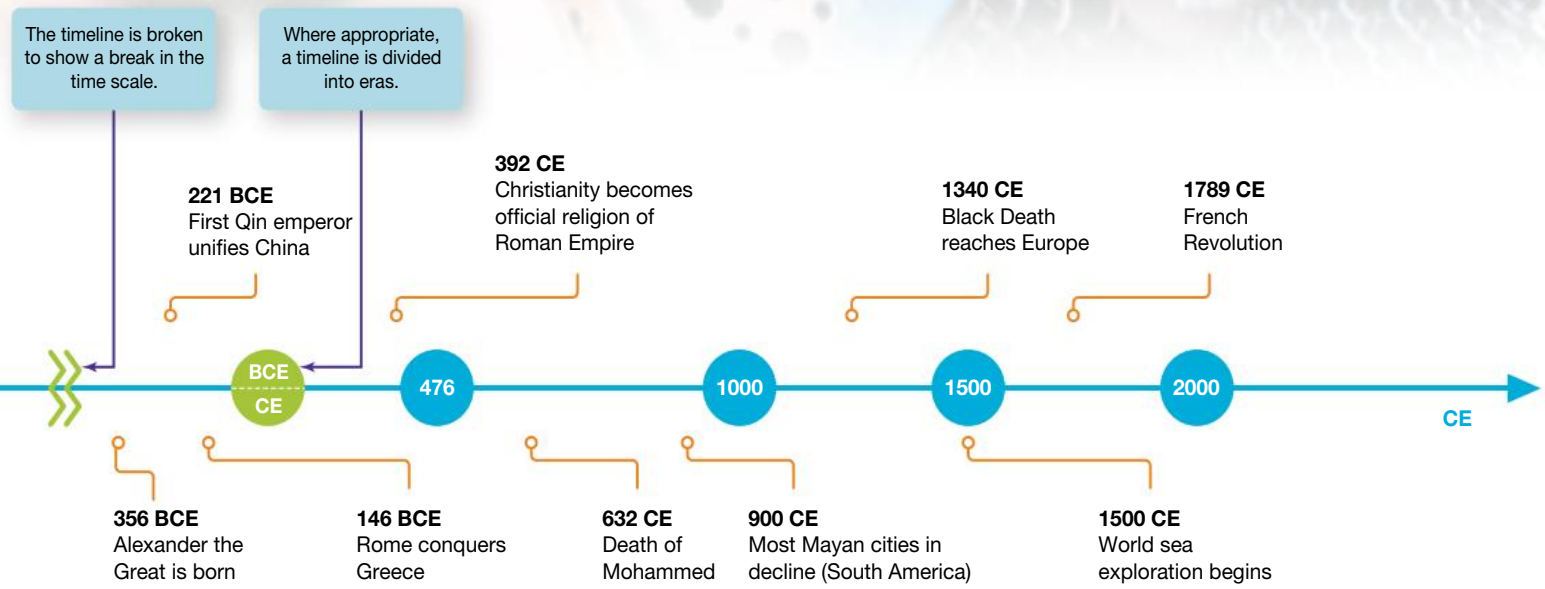
- **eWorkbook**
  Customisable worksheets for this topic
- **Digital document**
  Key terms glossary
- **Video eLesson**
  History concepts and skills



SkillBuilder

Use the SkillBuilder activities to develop these Historical concepts and skills:

- HISTORICAL QUESTIONS
- CHRONOLOGY
- USING HISTORICAL SOURCES
- CONTINUITY AND CHANGE
- CAUSES AND CONSEQUENCES
- HISTORICAL SIGNIFICANCE
- COMMUNICATING



LESSON 1.2 Historical concepts and skills

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **identify** the historical concepts and skills
- **explain** why they are important.

1.2.1 Introduction

From 600 to 1750 CE, Europe and the Mediterranean world, the Americas, Asia and the Pacific region experienced transformative events shaping modern society. This period saw empires rise and fall, the spread of religions and major cultural advancements. The medieval era brought the feudal system, Church dominance and the growth of monarchies.

The Renaissance and Reformation revolutionised art, science and technology, leading to the occupation of previously unknown lands and discovery of new trade routes. The Ottoman Empire and the Spanish conquest of the Americas significantly altered global dynamics.

In this topic, you will expand your historical knowledge and develop further the key historical concepts and skills introduced in Year 7, enhancing your understanding of this influential era.

1.2.2 Historical concepts and skills

As we know, historians study past civilisations, cultures and societies to understand how people lived, their ideas, customs, rulers and livelihoods. They examine sources to explain how lives were shaped by other people and events. This topic covers concepts and skills related to discovering a period of history between 600 and 1750 CE in Europe and the Mediterranean world, the Americas, Asia and the Pacific region.

TABLE 1 The concepts and skills that you will use in History

Concepts and skills	Description
Asking historical questions	Our understanding of the past is shaped by the questions we ask and the responses we receive.
Sequencing chronology	Historical events are arranged in order of time.
Using historical sources as evidence	Sources are any written or non-written materials that can be used to investigate and give us information about the past; evidence is the information we get from sources that is useful to our investigations.
Identifying continuity and change	Consideration is given to parts of life or society that have stayed the same and those that have changed over a period of time.
Analysing cause and consequence	The relationship between historical events or actions is analysed — for example, when one event or action happens because of another.
Determining historical significance	Consideration is paid to the importance given to events of the past.
Communicating	Ability to express our interpretations of the past is shown by constructing a historical argument using knowledge and evidence.

SOURCE 1 We can also view the concepts and skills diagrammatically.

The concepts and skills you will learn while studying History are also important in many careers. These skills will help you to:

- carry out research
- draw conclusions and make decisions based on evidence
- recognise the difference between fact and opinion
- understand that more than one way of thinking about any problem is usually possible
- think critically
- communicate effectively.

Knowledge of history is important in our everyday lives too. And history gives many people great personal pleasure. How much more enjoyment do people derive from travel, books and movies when they know about the history that shaped the places they visit, or the stories they read or watch on a screen?

1.2.3 Historical questions

In the study of History, our examination of the past is directed and influenced by the questions we ask. A broad spectrum of questions can be used to obtain specific information sought, and mastering the art of formulating these questions will enhance our historical research.

Questions may be crafted using the historical concepts and skills detailed in this topic. Such as **cause and consequence**, **continuity and change**, **significance** and **evidence**.

Outlined below is a table of questions frequently asked within the History classroom.

TABLE 2 Examples of questions you might ask in History

Historical thinking concepts and skills	Example of questions
Sequencing chronology	When does my timeline of events begin and when does it end? What event appears before … and what happened after? What event caused … to occur?
Using historical sources as evidence	Who wrote this source? Why did they write this source? What does this source tell me about the historical period I am studying, and what does it not tell me?
Continuity and change	At the beginning of the historical period I am studying, what was life like in regard to … (power structures / economy / people / ideas / technology)? By the end of the historical period I am studying, what changed in regard to … (power structures / economy / people / ideas / technology)? What / who caused these changes to occur? How quickly did these changes occur? What remained the same by the end of the historical period I am studying? What / who stopped these things from changing?
Causes and consequences	What were the short-term causes of …? What were the long-term causes of …? What were the political / economic / environmental causes of …? What were the immediate consequences of …? What were the long-term consequences of …? What were the political / economic / environmental consequences of…?
Significance	Why is this person / event / idea / movement important? How important was this person / event / idea / movement to those living during the historical period? How many people were affected by this person / event / idea / movement? How is this person / event / idea / movement remembered today?

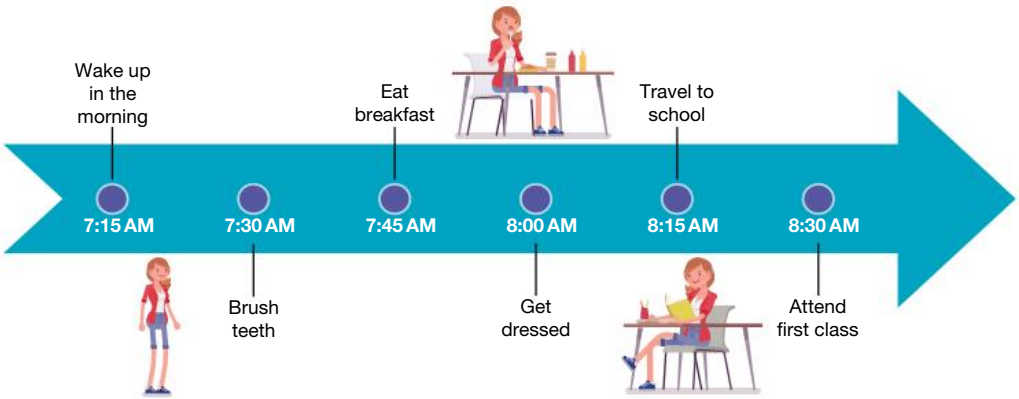
1.2.4 Chronology

Chronology involves recording and sequencing significant events, individuals, ideas and developments in the order they occurred. This systematic approach helps historians and researchers to track the progression of these elements over time, providing a clear understanding of how they interrelate.

By arranging events chronologically, we can explain the continuity and change that occurred throughout a given period, identifying what aspects of society, politics, economy and culture remained constant and what underwent transformation.

Additionally, this chronological sequencing helps in establishing the causes and consequences of events, shedding light on the short-term and long-term impacts they had on various facets of life.

SOURCE 2 A simple timeline representing the sequence of events during a typical morning



1.2.5 Using historical sources

Evidence consists of factual information that verifies or disproves an event. It can come from various sources and is crucial for verifying or refuting historical events.

Sources

Sources are any written or non-written materials that can be used to investigate and provide information about the past. It is important to make use of sources from the time we are studying, and after the time, to explore the different points of view, or perspectives, of people from the past.

Primary and secondary sources

Historians can use two types of sources to investigate events from the past.

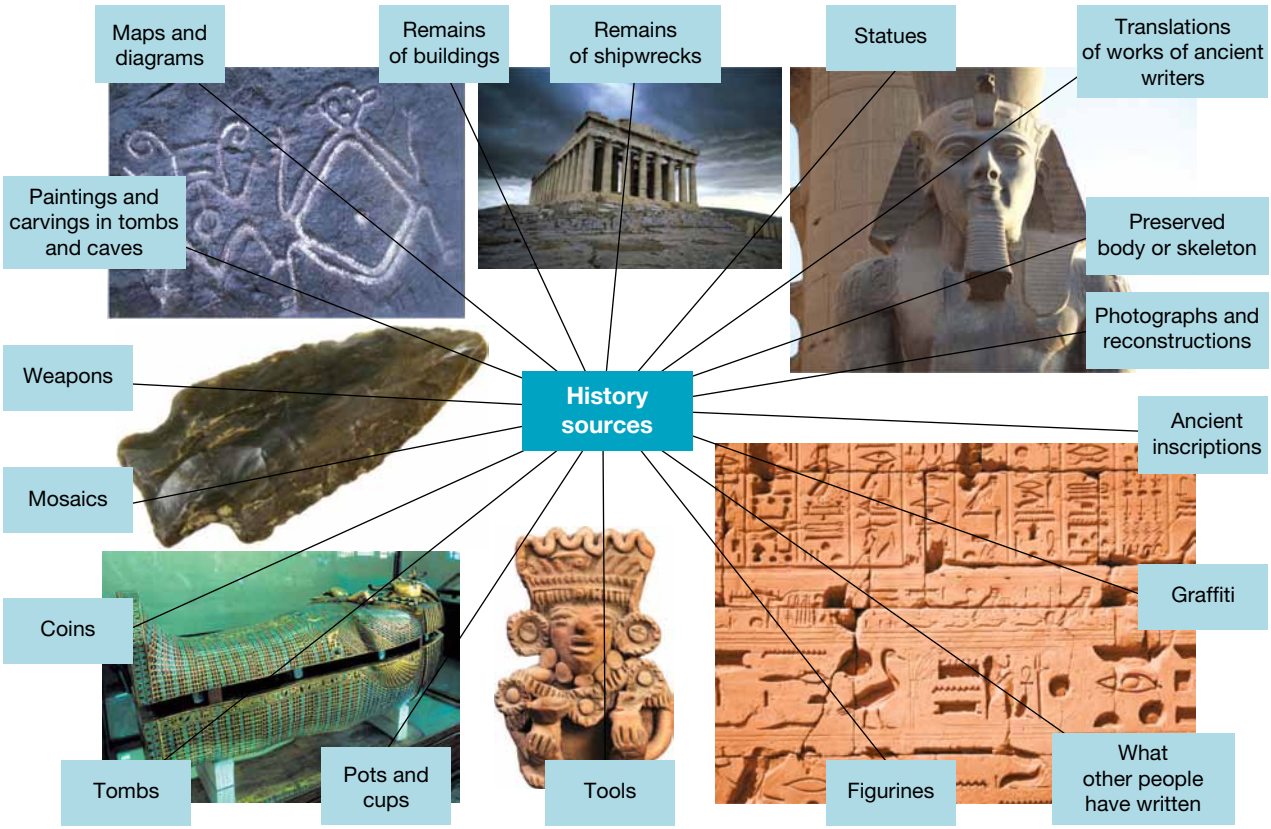
- **Primary sources** were created or written in the period that the historian is investigating.
- **Secondary sources** are written or created by people living after the period that the historian is studying.

Primary sources might include bones, stone tools, art, photographs or many other traces. Written primary sources can include such things as poems, songs, letters, newspapers, speeches, myths and legends.

Secondary sources can include books, articles, websites, models, timelines, computer software and documentary films. To create secondary sources, historians often:

- locate information in primary sources
- interpret that information
- use it to explain what happened.

SOURCE 3 The many different types of primary source



Analysing evidence

When using historical sources as evidence, historians need to ask questions about each source, such as where the source comes from (origin) and why it was created (purpose). A source may be fact or someone's opinion — that is, it could be **biased**. One way to test sources for reliability is to compare them to other sources. If this evidence leads to the same conclusion, we call it supporting evidence. If it leads to different conclusions, we have contradictory evidence.

When we use sources to try to find out about the past, we must ask some questions. For example, we might ask:

- What type of source is this?
- Who is the author or creator of this source, and when was it written or created?
- What was the purpose of writing or creating this source?
- What evidence does the source present?
- What were the historical or contextual circumstances at the time of the source's creation?
- Is the source reliable and trustworthy?

1.2.6 Continuity and change

When studying different societies, historians can see that some aspects of life have remained the same over time, while other aspects of life have changed dramatically. This concept is known as 'identifying continuity and change'.

Change refers to something that is different from what has occurred in the past. This may occur over a long period of time or may occur dramatically and suddenly.

Continuity refers to the things that endure, relatively unchanged, over time. You will find that many things remain the same across long periods in history. Sometimes these continuities have lasted into modern times.

SOURCE 4 **a.** Medieval doctors check for problems by using visual examinations. **b.** In contrast, a modern 3D dental scanner creates a detailed image of the jaw.

SkillBuilder discussion

Continuity and change

1. Consider the area of medicine. Look at the images in **SOURCE 4**. What are the main changes in medicine?
2. What, despite the passage of time, remains the same?

1.2.7 Causes and consequences

Once historical events have been placed into chronological order, investigating how one event has caused another event and how events are connected becomes easier. We can also look at the developments that have happened in both the short term and over a longer period of time.

In history, events do not simply occur without reason. Every event will have a cause and is likely to result in several effects or consequences. Being able to identify patterns of cause and effect is an essential skill for historians that allows them to explain how and why things happened in the past.

Causes may include people, societies, politics, beliefs, economics or any other historical factor. Likewise, effects can include impacts on people, societies, politics, beliefs, economics or any other historical factor. It is important to understand that not all causes leading to a specific event are equally significant — some causes may have more influence than others.

Some causes occur immediately before an event begins, while others may have existed for several years, decades or centuries before the event. Some effects occur immediately after an event or action, while others may occur years, decades or centuries following the event or action.

1.2.8 Historical significance

Historical significance relates to the importance of particular aspects of the past such as events, individuals or groups, developments, ideas or movements and historical sites. We need to make judgements about what is important and what is less important.

When we try to establish the significance of an aspect of the past, we must consider a number of questions. For example:

- To what extent was it relevant to individuals living during that period?
- What was the number of people impacted by it?
- In what ways did it alter individuals' lives?
- For what duration of time were individuals' lives affected?
- How significant and enduring were the consequences?
- How relevant is it to the contemporary world?

SkillBuilder discussion

Historical significance

1. List some of the things happening in the world today. These might be political, economic or geographical events.
2. Do you think that the things on your list will be significant 10, 20, 30 or 50 years from now?

1.2.9 Communicating

As a result of our investigations, we should be able to apply our newly learnt knowledge of a historical period and communicate this, using facts and evidence. We can present our interpretations of the past in a variety of ways, including written and multimodal presentations, oral presentations and other methods. It is important to use an appropriate and clear format to communicate our historical findings, including the use of subheadings, guiding questions and formal language.

Furthermore, as historians, we must acknowledge the sources we use and the interpretations of other historians in our work — this is called referencing, and there are several guidelines to follow when referencing. Often, your school or teacher will have you follow a particular reference guide, which informs you how to create a reference list.

1.2 SkillBuilder Activity SEQUENCING CHRONOLOGY

1. Construct a timeline of Europe and the Mediterranean world between 476 and 1683 CE.
   a. Use a vertical timeline.
   b. Divide it into centuries.
   c. Decide what scale you will use.
   Add these key events to your timeline:

1066 CE	William of Normandy wins the Battle of Hastings and becomes King of England.
476 CE	Western Roman Empire ends.
1096 CE	The Crusades start.
711 CE	Islamic forces conquer Spain.
1215 CE	King John of England is forced to sign the Magna Carta.
787 CE	The first recorded Viking raid on England takes place.
1298 CE	Osman I founds the Ottoman Empire.
1347 CE	The Black Death breaks out in Europe.
1429 CE	Joan of Arc drives the English out of Orleans.
1453 CE	Crusades end as the Ottomans take Constantinople.
1529 CE	Advancing Ottoman forces are defeated at Vienna.
1683 CE	Ottoman forces are again defeated in Vienna. Many see this as the beginning of the decline of the Ottoman Empire.

2. Answer the following questions based on the timeline you have drawn.
   a. What time span does your timeline cover (i.e. how many years in total are covered by your timeline)?
   b. Which event on your timeline was the earliest?
   c. How many years elapsed between the start and the end of the Crusades?
   d. How many years elapsed between the start of the Ottoman Empire and the beginning of its decline?
   e. What event of significance took place in the fifth century?

1.2 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 4, 8	2, 5, 6	7, 9

REMEMBER AND UNDERSTAND

1. Which of the following lists best represents the seven historical concepts and skills?
   A. Innovation, Migration, Invasion, Democracy, Trade, Economy, Culture
   B. Historical questions, Chronology, Using historical sources, Continuity and change, causes and consequences, historical significance, communicating
   C. Agriculture, Industry, Urbanisation, Exploration, Colonisation, Conflict, Trade
   D. Chronology, perspectives, empathy, bias, using historical sources, primary and secondary sources, communicating

2. What is involved in sequencing chronology?
   A. Comparing two different historical events
   B. Placing historical events in the order they occur
   C. Explaining why an event is important
   D. Identifying different perspectives of an event
3. What is the main difference between primary sources and secondary sources?
   A. Primary sources are written later, while secondary sources are created at the time.
   B. Primary sources are original, first-hand accounts, while secondary sources are interpretations or analyses of those accounts.
   C. Primary sources are about science, while secondary sources are about history.
   D. Primary sources are used in fiction, while secondary sources are used in nonfiction.
4. Provide two examples of written sources and two examples of archaeological sources.
5. Outline how historians create secondary sources.

ANALYSE AND APPLY

6. Explain why it would be wrong to think that primary sources are always more reliable than secondary sources.
7. Make a list of some kinds of primary sources that could be used to create a history of your school (a secondary source). Next to each source in your list, write what you think you could find out by using it as evidence.

EVALUATE AND COMMUNICATE

8. Examine **SOURCE 4**. Identify the changes that have occurred in medicine from the medieval times to the modern age.
9. Discuss the limitations of both primary and secondary sources.

Answers and sample responses for this topic are available online.

LESSON 1.3 SkillBuilder: Historical questions

online only

What are historical questions?

Historical questions may be asked to evaluate historical sources, examine cause and consequence or how or why something happened. In this lesson you will develop your ability to ask historical questions.

LESSON 1.4 SkillBuilder: Chronology

online only

What is a timeline?

A timeline is a tool that arranges events in the order they occurred. It typically includes dates and descriptive labels. Timelines can span short periods or many centuries. They may be simple lines or visually detailed with colours and images. In this lesson you will sequence events that occurred in Renaissance Italy.

LESSON 1.5 SkillBuilder: Using historical sources

online only

What are works of art?

Works of art are one common type of primary source. Throughout this topic we have examined various primary sources: artworks, monuments, buildings and written sources. Artworks include paintings, sculptures, bas reliefs and mosaics. Art styles changed significantly throughout the Middle Ages, and differed from kingdom to kingdom.

LESSON 1.6 SkillBuilder: Continuity and change

online only

What does 'explain continuity and change' mean when studying history?

When we study history, we try to understand how certain elements have persisted over time and how others have transformed. Continuity refers to aspects of the past that have remained relatively unchanged, while change refers to the evolution or transformation of other components over time.

LESSON 1.7 SkillBuilder: Causes and consequences

online only

The importance of analysing causes and consequences

In this lesson you will learn to understand how past events shape current situations. Understanding cause and consequence is crucial to grasp these connections. To evaluate any historical event's significance, we must identify its effects on later developments. Historians often disagree about these impacts due to their complexity.

LESSON 1.8 SkillBuilder: Historical significance

online only

How do we evaluate historical significance?

Of all the thousands of events that happen in our lifetime, how do we determine the ones that are significant? For most of us, the events that lead to a positive change are remembered as important. Historians face similar questions when they try to determine which events, ideas, achievement or people have the most impact on history. Asking questions about the impact of an individual, development or cultural achievement can help us to assess its significance in bringing about change. In this lesson you will evaluate the significance of some of the important thinkers during the Renaissance.

LESSON 1.9 SkillBuilder: Communicating

online only

What is communication?

Effective communication is essential in any successful study of history. Communication is not only about conveying information; it is also about conveying it sensitively and appropriately to different audiences.

LESSON 1.10 Review

1.10.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

History concepts and skills

- Historians investigate and interpret the past.
- History helps us to understand the present and what the future may hold.
- History provides us with essential skills.
- The seven Historical concepts and skills that you will develop throughout your course are:
- *Asking historical questions:* This involves asking questions in a way that helps to shape our understanding of the past.
- *Sequencing chronology:* This involves understanding the sequence of historical events and placing them in a timeline. It helps students to comprehend the order in which events occurred and how they relate to each other over time. This skill is essential for constructing a coherent narrative of the past and understanding the progression of historical developments.
- *Using historical sources:* This skill focuses on the ability to locate, analyse and interpret various types of historical sources, such as documents, artefacts and oral histories. Students learn to evaluate the reliability and perspective of sources, which is crucial for constructing accurate historical accounts and understanding different viewpoints.
- *Identifying continuity and change:* This involves identifying what has stayed the same and what has evolved over time. This skill helps students to recognise patterns and trends in history, understand the reasons behind changes and appreciate the persistence of certain elements across different periods.
- *Analysing causes and consequences:* This involves analysing the reasons behind historical events and their outcomes. Students learn to identify and evaluate the factors that led to specific events and the short-term and long-term effects of these events. Understanding causes and consequences is key to comprehending the complexities of historical processes.
- *Determining historical significance:* This refers to the importance of certain events, individuals or developments in history. Students learn to assess the impact and lasting influence of historical phenomena, considering factors such as the scale of change, the number of people affected and the duration of the impact.
- *Communicating:* This focuses on the ability to effectively convey historical knowledge and understanding through various forms of communication, including writing, speaking and using digital media. Students learn to present their ideas clearly and persuasively, using evidence to support their arguments and engaging with different audiences.

1.10.2 Key terms

absolute dating techniques methods used to assess the age of something (e.g. radiocarbon dating, tree-ring dating)
ancient history the period from the beginning of civilisation to the fall of the Roman Empire
anno Domini Latin for 'in the year of our Lord'
artefact an object made or changed by humans
biased one-sided or prejudiced; seeing something from just one point of view
cause and consequence the concept that every historical event will have a cause, and every event or action is likely to be the cause of subsequent effects or consequences
chronology a record of past events in order of time, from ancient Greek *chronos* (time) and *logos* (word)
civilisations societies that have towns and features such as complex forms of government and religion
contestability when particular interpretations of the past are open to debate
continuity and change the concept that while many changes occur over time, some things remain constant

evidence information that indicates whether something is true or really happened
heritage everything that has come down to us from the past
hypothesis (plural: hypotheses) a theory or possible explanation
Latin the language of ancient Rome and its empire
perspectives point of view or attitude
prehistory the period before writing was invented
primary sources objects and documents that were created or written in the period of time that the historian is investigating
relative dating techniques methods used to assess whether something is older than something else (e.g. stratigraphy, fluorine dating)
secondary sources reconstructions of the past written or created by people living at a time after the period that the historian is studying
significance the importance assigned to particular aspects of the past; for example, events, developments, movements and historical sites
strata (singular: stratum) distinct layers of material beneath the ground, built up over time, that provide information for archaeologists and geologists
timeline a diagrammatic tool representing a period of time, on which events are placed in chronological order

1.10.3 Reflection

Complete the following to reflect on your learning.

Revisit the Inquiry question posed in the Overview:

Why are Europe, the Mediterranean world, the Americas, Asia and the Pacific regions important to study, and what skills do I need to understand this history?

1. Now that you have completed this topic, what is your view on the questions? Discuss with a partner. Has your learning in this topic changed your view? If so,how?
2. Write a paragraph in response to one of the inquiry questions, outlining your views.

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eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary

1.10 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 6	4, 7, 10	5, 9

REMEMBER AND UNDERSTAND

1. Chronological order means:
   A. a timeline.
   B. in order from the beginning to the end.
   C. any random order.
   D. from the end to the beginning.
2. The work of historians can be described like that of detectives because:
   A. historians solve crimes.
   B. historians are always right.
   C. historians never make mistakes.
   D. historians gather evidence from sources and interpret that evidence.
3. Primary sources are:
   A. sources that were created during the time being studied.
   B. sources that came first.
   C. secondary sources.
   D. books.
4. Identify which of the following concepts of history refers to the facts and information available to historians.
   A. Perspective
   B. Evidence
   C. Cause and effect
   D. Empathy
5. The concept of history 'continuity and change' refers to:
   A. the study of aspects of history that have remained relatively unchanged and the aspects that have changed dramatically.
   B. studying written or non-written materials that can be used to provide information about the past.
   C. historians trying to discover how people thought and felt in the past.
   D. the ability to make judgements about the importance assigned to particular aspects of the past.

ANALYSE AND APPLY

6. In your own words, **explain** what the term *supporting evidence* means.
7. What is a hypothesis?
8. Archaeologists search for historical sources to help them understand the past. **Describe** four examples of archaeological sources.

EVALUATE AND COMMUNICATE

9. Look carefully at **SOURCE 3**. Choose two images and **evaluate** the usefulness of these for understanding the day to day experiences of people.
10. Explain why primary sources are often used in museum displays.

Answers and sample responses for this topic are available online.

LESSON 1.3 SkillBuilder: Historical questions online only

By the end of this SkillBuilder you should be able to develop key historical questions.

1.3.1 Tell me

What are historical questions?

Historical questions may be asked to evaluate historical sources, examine cause and consequence, or outline how or why something happened.

Why are historical questions useful?

Historical questions are useful because they allow us to critically evaluate historical sources, understand the causes and consequences of events, and explore the reasons behind historical occurrences. They guide researchers in their investigation of the past, helping them to construct detailed and accurate narratives. By asking historical questions, we can gain insights into the complexities of history and develop a deeper appreciation for the events that have shaped our world.

SOURCE 1 An example of a historical question

How were communities affected by the Black Death?

1.3.2 Show me

To develop historical questions, you will first need to choose your topic. If your topic is medieval Europe, a good place to start is to think about what you would like to know more about.

Step 1

Create a list of initial questions about a specific historical event — in this example, we could focus on how medieval Europe was affected by the Black Death. For example:

- How did the Black Death impact the daily lives of people in medieval Europe?
- What were the social and economic consequences of the Black Death on European communities?
- How did medical knowledge and practices of the time contribute to the spread or containment of the Black Death?
- What role did religion and the Church play in shaping public responses to the Black Death?
- How did the Black Death influence art, literature and cultural expressions in medieval Europe?

Step 2

To answer the questions that you have developed, you will need to have a source to help you.

You may wish to use other sources in this resource or you might find additional ones from your own research.

1.3.3 Let me do it

Complete the following activities in small groups to practise this skill.

SOURCE 2 The bubonic plague was so named because of the appearance of 'buboes', which were swellings of the lymph nodes.

1.3 ACTIVITIES

1. Decide on a topic from history that you would like to inquire about to find out more.
2. Mind-map a list of initial questions about this historical event, such as what caused it or what was it like.
3. a. Locate a range of (2–3) historical sources related to the event.
   b. Evaluate the sources and determine if the initial questions can be answered with the available evidence.
   c. Based on your evaluation, you may wish to refine your initial questions by introducing some other historical concepts and skills, such as cause, consequence, continuity and change. Present your list of improved questions to your class.
   d. Discuss how the questions have evolved and how they better address your initial historical 'inquiry'.

LESSON 1.4 SkillBuilder: Chronology online only

LEARNING INTENTION

By the end of this SkillBuilder you should be able to **sequence** events in chronological order.

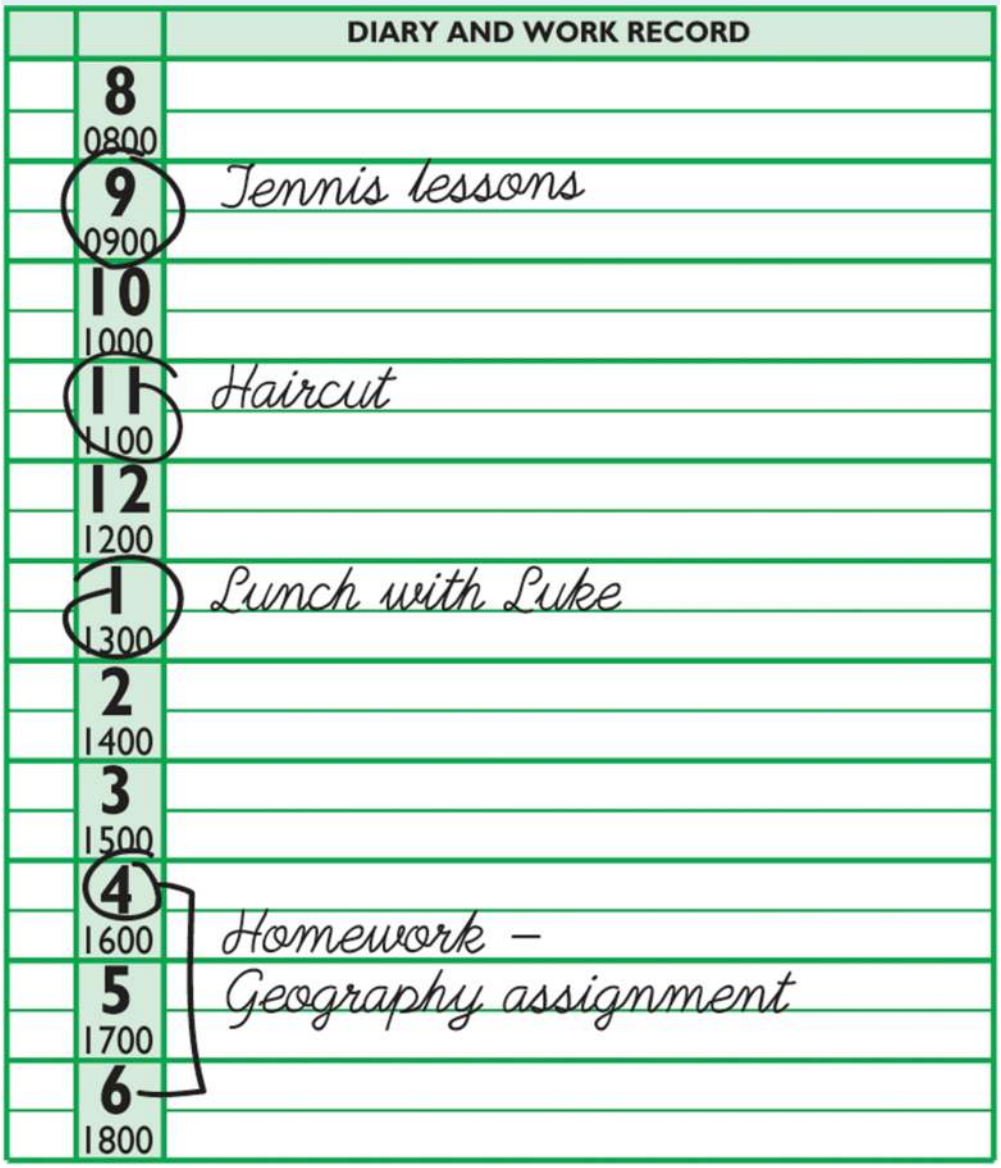
1.4.1 Tell me

What is a timeline?

A timeline is a diagrammatic tool for placing events in chronological order (the order in which they happened). A simple chronology would be one, for example, that showed in sequence, or time order, key events of a day in your life.

Why are timelines useful?

SOURCE 1 A simple chronology

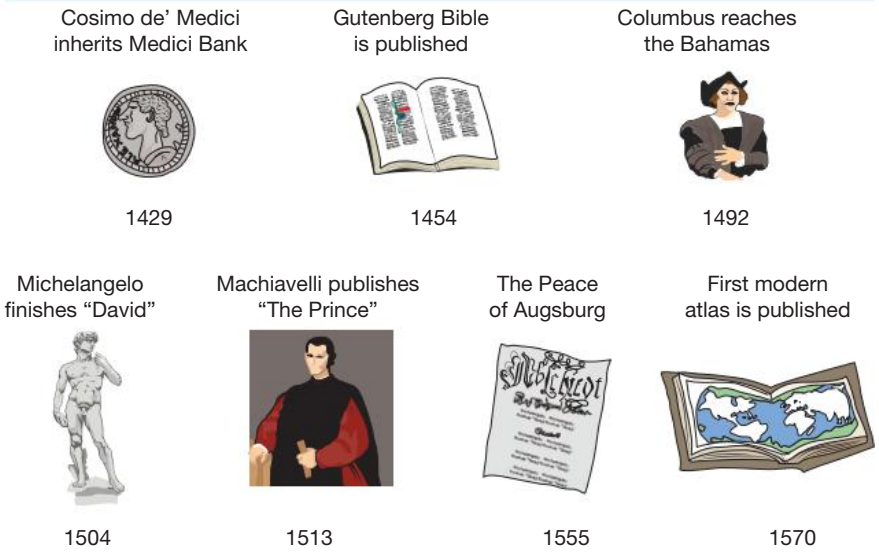


Timelines are useful because they can help us make sense of events in the past. Timelines are particularly useful in the study of history. Creating a history timeline will help to:

- understand the order in which events occurred
- describe the time distances between events
- identify what has changed over time
- identify what has stayed the same over time
- analyse how one event might relate to other events
- compare what might have been happening in different places at the same time
- assess whether one event might have led to another event (cause and effect).

Generally, timelines are constructed using a sequence of dates with the addition of descriptive labels. The timeline may span thousands of years or cover a very short period. In print, timelines may be as simple as a horizontal or vertical line, or highly visual with use of colour and images. Using digital technology, online timelines can be interactive, whereby users click on a date to see a descriptive label, an image or hear an audio narrative or sound effects.

Source 2 A simple horizontal timeline of a specific historical period



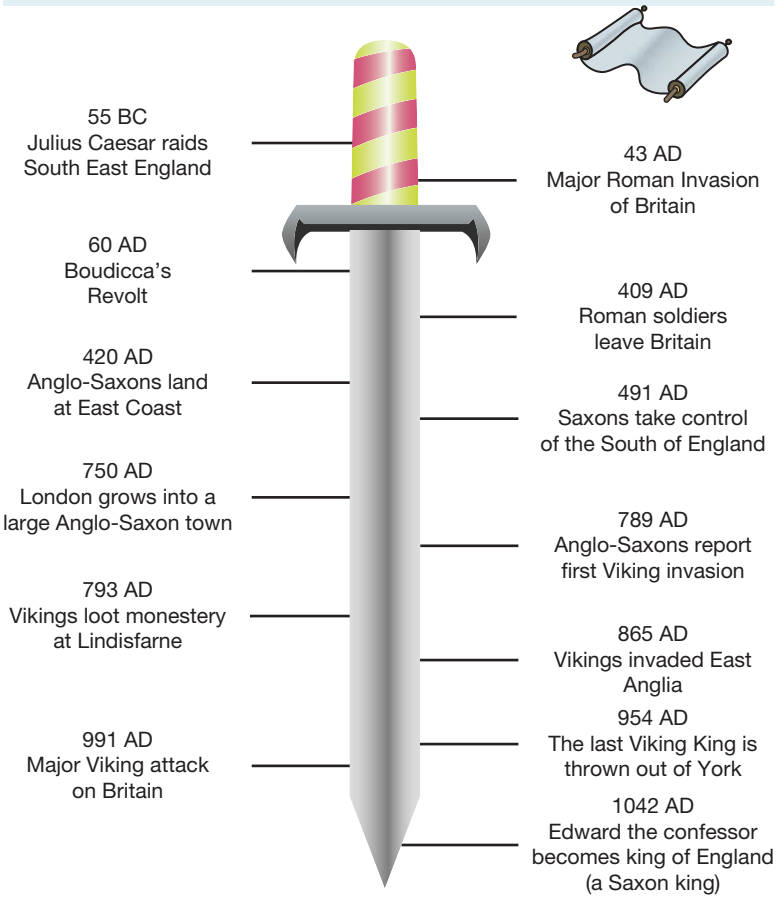
1.4.2 Show me

How to create a timeline

Timelines can cover very short or very long periods of time. They have the following features and requirements:

- They can focus on just a few months or years.
- They can focus on big, sweeping changes over thousands of years.
- In most cases, they are divided up into equal blocks of time, such as decades or centuries.
- This is not essential, but it helps us to see not only the order of events but also how close or how far apart they were.
- A break in the timeline (shown using a zigzag line, for instance) can show a long span of time between one date and the next.
- To make equal blocks of time, you need to use a scale — for example, 1 centimetre = 10 years.
- Timelines can be horizontal (across the page), with the earliest dates on the left and latest dates to the right.

SOURCE 3 A simple vertical timeline



- Alternatively, they can be vertical (down the page), in which case the dates usually run from the earliest at the top to the latest at the bottom.
- Often, we have only approximate dates for events in ancient history. In those cases, we put 'c.' in front of the date. This stands for the Latin word *circa*, which means 'around' or 'about'.

Step 1

Study the timelines shown in **SOURCE 2** and **SOURCE 3** Look at the way these timelines have been constructed.

Step 2

A completed timeline has a clear title.

The title should state:

- the time period covered
- the subject or theme
- the beginning and end dates.

1.4.3 Let me do it

Complete the following activities to practise this skill.

1.4 SkillBuilder Activity

1 Construct a timeline of significant events in Renaissance Italy between 1300 and 1600.
- Use a horizontal timeline.
- Divide it into decades.
- Decide on the scale you will use.

Key events for your timeline

c. 1300	The Renaissance begins in Florence.
1386	Construction of the Milan Cathedral begins.
1401	A competition is organised to find the creator of the bronze doors of the Florence Baptistery.
1420	Filippo Brunelleschi starts work on the dome of the Florence Cathedral.
1450	Francesco Sforza becomes Duke of Milan.
1469	Lorenzo de' Medici, known as 'Lorenzo the Magnificent', begins his rule in Florence.
1486	Pico della Mirandola's *Oration on the Dignity of Man* is published.
1492	Christopher Columbus arrives in the Americas.
1498	Girolamo Savonarola is executed in Florence.
1503	Leonardo da Vinci begins painting the *Mona Lisa*.
1512	Michelangelo completes the Sistine Chapel ceiling.
1517	Martin Luther's *Ninety-Five Theses* spark the Protestant Reformation.
1534	Michelangelo begins work on *The Last Judgment* in the Sistine Chapel.
1559	The Italian Wars end with the Treaty of Cateau-Cambrésis.
1588	Galileo Galilei begins to study the motion of the pendulum.
1595	Caravaggio paints *The Calling of Saint Matthew*.

Your timeline will help you to analyse and compare events. For example, you could use it to answer questions, such as:
- Which of these events marked the beginning of the Renaissance in Italy?
- Which individuals were instrumental in the cultural developments of the period?

2. Answer the following questions based on the timeline you have drawn:
   a. What are the key characteristics of the Renaissance period in Italy?
   b. Identify the major artistic figures of Renaissance Italy and their contributions.
   c. Between which years did Lorenzo de' Medici rule Florence?
   d. How did the European arrival in the Americas in 1492 impact the Renaissance in Italy?
   f. What statement could you make about the influence of the Medici family during the Renaissance period?
   g. What significant architectural achievement was initiated by Brunelleschi, and why was it important?
   h. What might have been a consequence for Renaissance Italy of the Protestant Reformation initiated by Martin Luther? (Hint: Look for events related to religious conflicts and changes in patronage.)

LESSON 1.5 SkillBuilder: Using historical sources online only

LEARNING INTENTION

By the end of this Skillbuilder you should be able to **use** historical sources.

1.5.1 Tell me

What are works of art?

Works of art are one common type of primary source. Throughout this topic we have examined various primary sources: artworks, monuments, buildings and written sources. Artworks include paintings, sculptures, bas reliefs and mosaics. Art styles changed significantly throughout the Middle Ages, and differed from kingdom to kingdom.

Why is analysing artwork useful?

Artwork can tell us a great deal about a particular period or event. It may also tell us what ideas, beliefs or activities people felt were important enough to express in artwork. For example, an elaborately carved altarpiece in a church tells us that much attention was given to expressing the Christian faith during the Middle Ages.

1.5.2 Show me

How to analyse a work of art

A useful way to approach the task of analysing a work of art is remembering to use 'the three Cs' — content, context and comment.

Content

The content is what the artwork actually shows. Look at it very carefully and make sure you note all the details. For example, you might need to look for particular symbols or gestures. Think about how you would describe the image to someone who has not seen it; that way you can be sure you have looked at it thoroughly.

Context

Context refers to what was happening at the time the artwork was created — the historical background. Try to find out about the origin and purpose of the artwork: who created it, and why? Is it a primary or a secondary source? Knowing this can reveal as much as the artwork itself. The detail from the Mariacki altar in **SOURCE 1** was created by an artist called Wit Stwosz. The artist and his team were commissioned to create this altarpiece for the Church of Our Lady in Kraków, Poland. During the Middle Ages, artists were frequently employed to create artworks with religious themes. This altarpiece shows various saints, the ascension of the Virgin Mary into heaven and scenes from the life of Jesus. At the time of its creation in the Late Middle Ages, it was the largest altarpiece in the world.

Comment

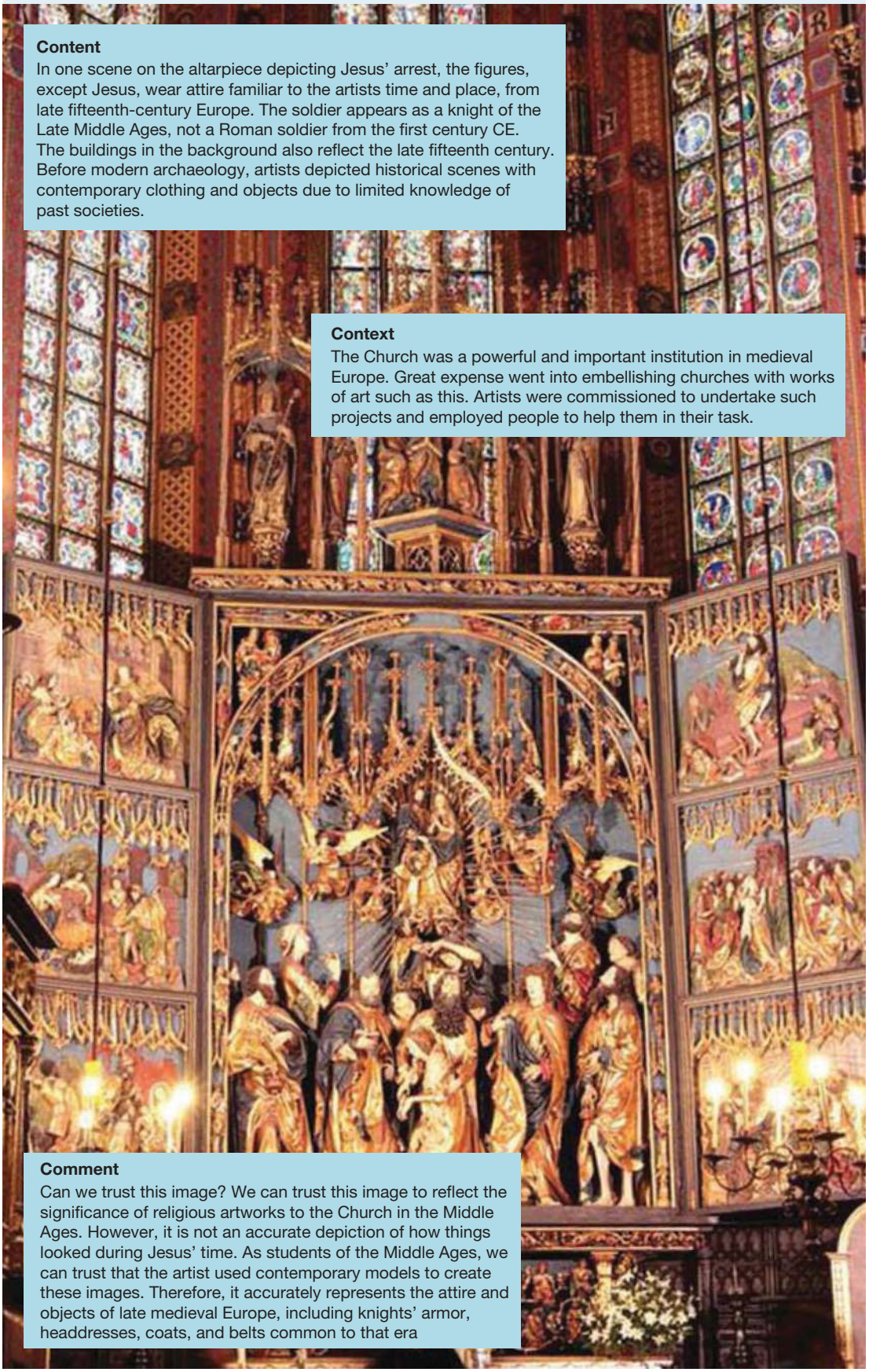
You should question the value of every source. Why is it useful? Does it give you raw information or does it show only a particular point of view? Are there any limitations to the source — that is, is there anything the illustration cannot tell you? Do you think it is a reliable source? Why or why not? Remember, the origin and purpose of any historical source will always influence its value and limitations.

If you ask these questions each time you analyse an artwork, you'll be on your way to becoming an effective historian. In the following example, the three Cs have been applied to **SOURCE 1**.

1.5.3 Let me do it

Complete the following activities to practise this skill.

SOURCE 1 A detail from the Mariacki altar in the Church of Our Lady in Kraków, Poland, showing the arrest of Jesus. It was carved by Wit Stwosz in the late fifteenth century.



Content
In one scene on the altarpiece depicting Jesus' arrest, the figures, except Jesus, wear attire familiar to the artists time and place, from late fifteenth-century Europe. The soldier appears as a knight of the Late Middle Ages, not a Roman soldier from the first century CE. The buildings in the background also reflect the late fifteenth century. Before modern archaeology, artists depicted historical scenes with contemporary clothing and objects due to limited knowledge of past societies.

Context
The Church was a powerful and important institution in medieval Europe. Great expense went into embellishing churches with works of art such as this. Artists were commissioned to undertake such projects and employed people to help them in their task.

Comment
Can we trust this image? We can trust this image to reflect the significance of religious artworks to the Church in the Middle Ages. However, it is not an accurate depiction of how things looked during Jesus' time. As students of the Middle Ages, we can trust that the artist used contemporary models to create these images. Therefore, it accurately represents the attire and objects of late medieval Europe, including knights' armor, headdresses, coats, and belts common to that era

1.5 ACTIVITIES

1. Look at **SOURCE 2** and analyse it by completing the tasks below.

SOURCE 2 A French illustration depicting nuns looking after the sick

   a. Describe what is happening in the artwork.
   b. What impression is the artist trying to make about the subject of the artwork (the nuns)?
   c. What are the figures doing? What are the various activities? Can you identify the different roles among the figures?
   d. What sort of problems in dealing with historical sources do your answers to the above questions highlight?
2. You have learnt some of the history behind **SOURCE 1** and the sort of information it presents. This helped assess its usefulness as a source. You should now be able to think about the effectiveness of **SOURCE 2** as a historical source by answering the following questions.
   a. It is fairly certain that **SOURCE 2** was created under the direction of Church authorities. Perhaps members of the clergy created it. How might that influence the way the nuns are presented?
   b. If this was the only source available on the role of nuns in the medieval Church, what conclusions might you draw? Would all your findings be accurate?
   c. Why must historians be careful when looking at sources such as this?
   The types of questions you have asked about **SOURCE 2** can be used for any medieval artwork — in fact, they can be used to analyse artwork from any era. Keep them in mind whenever you are looking at history through artwork.
3. Based on your work interpreting sources on medieval Europe, answer the following questions.
   a. What types of artworks are categorised under the term 'medieval artworks'?
   b. What does it mean to explore the content of an artwork?
   c. Explain what exploring the context of a medieval artwork requires historians to do.
   d. How can analysing medieval artwork be useful to historians?

LESSON 1.6 SkillBuilder: Continuity and change online only

LEARNING INTENTION

By the end of this SkillBuilder you should be able to explain continuity and change over time.

1.6.1 Tell me

What does 'explain continuity and change' mean when studying history?

When we study history, we try to understand how certain elements have persisted over time and how others have transformed. Continuity refers to aspects of the past that have remained relatively unchanged, while change refers to the evolution or transformation of other components over time.

Why is explaining continuity and change important?

Explaining continuity and change helps us to comprehend the dynamic nature of history. By identifying what has stayed the same and what has evolved, we can better understand the forces and conditions that shape societies. This skill allows us to appreciate the complexity of historical processes and to see the connections between past and present.

1.6.2 Show me

How to explain continuity and change in historical events

Explaining continuity and change in history can be a challenging task, but it becomes more manageable if you break down the process into a few smaller questions. Historians ask a range of questions to help organise their ideas when examining continuity and change, including:

- Did something change because of this historical figure or event?
- How many people's lives were affected?
- How long-lasting were the changes?

By addressing these questions, you will be able to provide a clearer picture of how historical events and processes unfold over time.

As an example, let's consider the conquistador Hernán Cortés. The three questions can be used to consider continuity and change by his role in history.

Source 1 A vintage illustration of Hernan Cortes

Did something change because of this historical figure or event? Hernán Cortés led the Spanish conquest of the Aztec civilisation, introducing European diseases that devastated the population, and later became governor of New Spain, spreading Spanish culture in the Americas. Whether these changes were positive or negative depends on perspective; they were likely considered positive by the Spanish but negative by the Aztecs.

How many people's lives were affected? Cortés's actions immediately affected hundreds of thousands of people, including his soldiers and Tenochtitlan's 250 000 residents. Long term, millions were impacted due to the establishment of New Spain, indicating his significant role in history.

How long-lasting were the changes? The changes Cortés brought about permanently altered the Aztec civilisation, leading to its destruction.

1.6.3 Let me do it

1. Now that you have seen how you can approach the task of explaining continuity and change, answer the three questions to analyse the role of an historical figure or event of your choice.
   a. Did something change because of this historical figure or event? If so, what was the change, and was it positive or negative?
   b. How many people's lives were affected?
   c. How long-lasting were the changes? Did the situation return to how it was previously or did the changes remain for a long period of time?
2. What were two main changes brought through the actions of your chosen person or event?
3. How did the population of associated cities change in relation to your chosen figure or event?
4. Explain why it is important to evaluate the role of individuals, achievements or events and how they contribute to continuity and change when studying history.
5. Why do you think that how long-lasting the changes were is a useful indication for evaluation?
6. What other factors do you think might be useful to help evaluate the role of an individual, achievement or event? Share and compare your ideas with other members of your class.

LESSON 1.7 SkillBuilder: Causes and consequences online only

LEARNING INTENTION

By the end of this SkillBuilder you should be able to analyse cause and consequence effectively.

1.7.1 Tell me

The importance of analysing causes and consequences

Studying history helps us understand our world by revealing how past events shape current situations. Understanding cause and consequence is crucial to grasp these connections. To evaluate any historical event's significance, we must identify its effects on later developments. Historians often disagree about these impacts due to their complexity.

Immediate causes and long-term trends

In a football match, immediate causes like player performance and strategies determine the winner. However, long-term trends such as recruitment, coaching and team leadership also play a role in sustained success.

Similarly, historical events have short-term triggers and underlying causes. Immediate events lead directly to a situation, while deeper societal conditions create a backdrop that allows these events to occur. Both are important for understanding history comprehensively.

1.7.2 Show me

How to analyse causes and effects of significant events

To demonstrate a method of determining causes and effects, we need a sample question. For the purposes of this exercise, let us examine the following question:

Why did Japan descend into the Warring States period from the mid-fifteenth century until the establishment of the Tokugawa shōgunate in 1603?

We can tackle this through the following steps.

Step 1

Identify the period of the Warring States and list key events before and during this time.

The Warring States period occurred from 1467 to 1603. Key events include:

- In 1467, a civil war erupted between supporters of two brothers vying to be the shōgun.
- The conflict began in 1464 over the shōgun succession.
- Powerful daimyō clans backed each brother, seeking greater power.
- Wars between daimyō clans continued for over 100 years until unification under Oda Nobunaga, Toyotomi Hideyoshi, and Tokugawa Ieyasu, who established the Tokugawa shōgunate in 1603.

Step 2

Identify longer-term trends in Japanese society before and during the conflict.

- The Ashikaga shōguns held power since the fall of the Kamakura shōguns, who lost power due to daimyō and samurai uprisings.
- Daimyō, wealthy landowners backed by samurai, held significant power since the eighth century.
- During the Warring States period, Ashikaga shōguns were essentially puppets of various daimyō clans.
- Since 1192, shōguns held official military power, with the emperor as a figurehead.

Step 3

Formulate an answer to explain the causes of the Warring States period.

The Warring States period had immediate and long-term causes. The immediate trigger was a succession dispute between two brothers in 1467, leading to civil war among daimyō clans. Wars persisted for over 100 years due to daimyō power struggles. The underlying cause was the daimyō's wealth and power, which fuelled constant rivalries and conflicts. The Kamakura shōguns had also lost power in 1333 due to daimyō and samurai rebellions. The period of conflict ended when Tokugawa Ieyasu weakened the daimyō's power and restored shōgunal authority.

1.7.3 Let me do it

1.7 ACTIVITIES

1. Use the three steps in the Show me section to answer the following question, discussing both the long-term trends and the short-term causes: **Why did the Tokugawa shōguns take control of Japan's foreign trade?**
2. Based on your analysis of the causes of the Tokugawa shōguns' decision to take control of foreign trade, answer the following questions:
   - **a.** How important was the issue of religion in the policy of the Tokugawa shōguns to tightly control foreign trade?
   - **b.** Why did the shōguns have a different attitude to the Dutch than they did toward the Spanish and Portuguese in matters of trade?
   - **c.** Identify two examples in the *Closed Country Edict* of 1635 that are designed to reinforce the Tokugawa shōguns' control of trade.
   - **d.** Why would the Tokugawa shōguns have considered it important to deny other daimyō families access to foreign trade?
   - **e.** Outline two ways in which the Tokugawa shōguns were able to benefit personally from their control of trade.
   - **f.** How did the shōgunate control of trade affect the availability of valuable metals within Japan?

LESSON 1.8 SkillBuilder: Historical significance online only

LEARNING INTENTION

By the end of this SkillBuilder you should be able to explain the significance of historical events and sources.

1.8.1 Tell me

How do we evaluate historical significance?

Of all the thousands of events that happen in our lifetime, how do we determine the ones that are significant? For most of us, the events that lead to a positive change are remembered as important. Historians face similar questions when they try to determine which events, ideas, achievement or people have the most impact on history. Asking questions about the impact of an individual, development or cultural achievement can help us to assess its significance in bringing about change. To do this, we must first understand the idea or achievement. When we are trying to evaluate the historical significance of a development, it is important to consider:

1. Who created the source we are analysing and when was it created?
2. What is the key idea, historical event, movement or figure?
3. Who was affected by the key idea, historical event, movement or figure?
4. Did the key idea, historical event, movement or figure lead to any change?
5. What was the scale of the change (was it a big change or a small one)?
6. Who was affected by the change?
7. Which areas of society were affected by the change?
8. Did the change lead to other changes?

1.8.2 Show me

The view of the universe shown in **SOURCES 1** and **2** was developed by Aristotle (384–322 BCE), an ancient Greek thinker, and changed only slightly by Ptolemy, another Greek, in the second century CE.

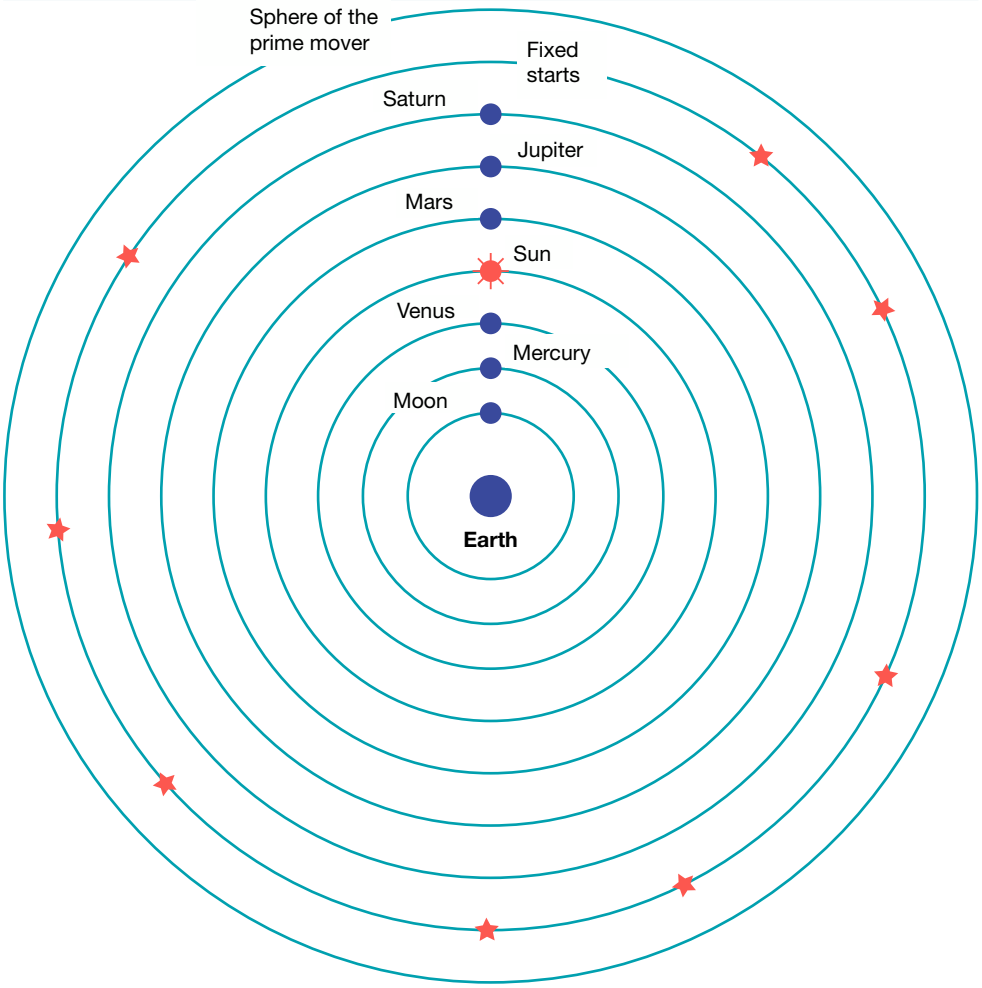
Aristotle's view was taught in universities in Christian Europe from the twelfth century CE. During the Renaissance era, the Catholic Church still maintained that Aristotle's explanation was unquestionably true. Aristotle held that Earth stood still at the centre of the universe. Water, air and fire were shells around the sphere of Earth. Heavenly bodies were believed to be spheres of an element called *aether*, and they were supposed to rotate in perfect circles around Earth in the following order: Moon, Mercury, Venus, Sun, Mars, Jupiter, Saturn, fixed stars and a 'prime mover' (*Primu Mobile* in **SOURCE 1**). It was believed that beyond this system there was no wider universe.

Study **SOURCE 1**. The questions for evaluating historical significance have been applied to this source.

1. *Who created the source and when was it created?* The source was created by Aristotle, an ancient Greek, in the fourth century BCE.
2. *What is the key idea, historical event, movement or figure?* The source explains the order of the solar system, with Earth at the centre. This was proposed by Aristotle, a Greek philosopher and polymath.
3. *Who was affected by the key idea, historical event, movement or figure?* The Catholic Church adopted this explanation of the universe and upheld it as the official explanation throughout Western Europe.
4. *Did the key idea, historical event, movement or figure lead to any change?* The explanation of the solar system expressed in **SOURCE 1** was upheld for approximately 2000 years.
5. *What was the scale of the change? (Was it a big change or a small one?)* There were very few changes to this explanation until Nicolas Copernicus published his model in 1507.

SOURCE 1 The structure of the universe as theorised by Aristotle

SOURCE 2 An artistic impression of the structure of the universe as theorised by Aristotle



6. *Who was affected by the change?* Because this explanation was sanctioned by the Catholic Church, it affected the general population.
7. *Which areas of society were affected by the change?* As the official view of the Catholic Church, Aristotle's explanation of the solar system influenced attitudes to science and religion.
8. *Did the change lead to other changes?* Aristotle's explanation of the solar system did not lead to changes in the Renaissance.

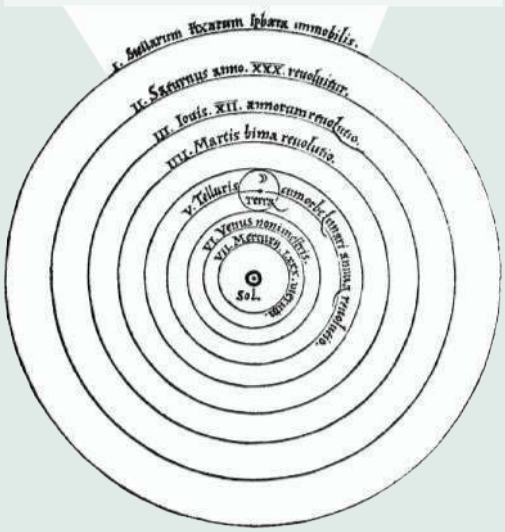
1.8.3 Let me do it

Complete the following activities to practise this skill.

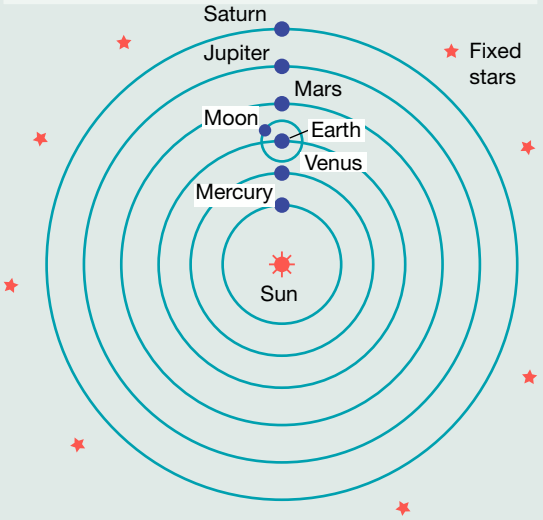
1.8 ACTIVITIES

1. Study **SOURCES 3** and **4**.

SOURCE 3 This alternative view of the universe was presented by the Polish astronomer and mathematician Nicolaus Copernicus.



SOURCE 4 An artistic impression of the structure of the universe as theorised by Copernicus



This alternative view of the universe was presented by the Polish astronomer and mathematician Nicolaus Copernicus (see section 10.9.1). From about 1507, Copernicus's calculations convinced him that the Earth rotated on its own axis and that it rotated around the Sun, which was the real centre of the universe. He spent much of the next 30 or more years working on this theory but he delayed publishing his ideas because he feared that the Church would call him a heretic. The theory was finally presented in his book *The Revolution of the Heavenly Bodies*, which was published in 1543 as he was dying. Like other scholarly books of the time, it was written and printed in Latin. In Copernicus's diagram, *sol* means Sun and *terra* means Earth.

Use the eight questions to analyse the historical significance of **SOURCE 3**.

a. Who created the source we are analysing and when was it created?
b. What is the key idea, historical event, movement or figure?
c. Who was affected by the key idea, historical event, movement or figure?
d. Did the key idea, historical event, movement or figure lead to any change?
e. What was the scale of the change? (Was it a big change or a small one?)
f. Who was affected by the change?
g. Which areas of society were affected by the change?
h. Did the change lead to other changes?

2. Apply your analysis of **SOURCE 3** and the **SOURCE 1** from the Show me section to answer the following questions.

a. Explain the difference between Aristotle's theory and Copernicus's theory of the location of Earth within the solar system.
b. Explain the difference between Aristotle's theory and Copernicus's theory of the movement of the planets. In your answer refer specifically to the movement of the Sun and Earth.
c. The Catholic Church rejected Copernicus's findings and charged Galileo with heresy when he wrote in support of Copernicus's theory. Suggest reasons why the ideas of Copernicus and Galileo were rejected by the Church.

LESSON 1.9 SkillBuilder: Communicating

LEARNING INTENTION

By the end of this SkillBuilder, you should be able to understand what is meant by effective communication.

1.9.1 Tell me

What is communication?

Effective communication is essential in any successful study of history. Communication is not only about conveying information; it is also about interpreting and presenting it in a coherent and persuasive manner.

Why is communication important?

Studying history involves handling a wealth of information, and communicating it effectively ensures better understanding and retention. It helps in expressing complex ideas clearly and engagingly, making your points more convincing.

1.9.2 Show me

How to communicate effectively Summarising key ideas clearly and concisely is a good way to start. Here are some guidelines for effective communication:

Step 1

Understand the source material thoroughly before attempting to communicate its content. Read it several times if needed.

Step 2

Identify the main ideas and supporting details. Highlight or underline key points, and make note of anything unfamiliar.

Step 3

Organise your points logically. Present them in a coherent and engaging manner, ensuring your audience can easily follow your argument. Use clear language and avoid jargon.

Example: Communicating the concept of *rāhui* and the extinction of the moa from **SOURCE 1**

Rāhui was a conservation method used by the Māori to manage resources. Despite its effectiveness, it was implemented too late to save the moa, a crucial food source. The moa's extinction had significant repercussions, illustrating the importance of timely and effective resource management.

SOURCE 1 Taking notes on the *rāhui* and the extinction of the moa

Rāhui is a form of tapu that the Māori used to limit resource use. For example, *rāhui* could be imposed over an area to prevent the gathering of food while the land recovered. It helped to conserve limited food supplies and other natural resources. All Māori tribes accepted the principles of *rāhui*.

Unfortunately, *rāhui* came too late for the moa. Although the young birds were an important food source of the Haast's eagle, the adult moa lacked any natural predators prior to human settlement. The moa became an abundant and important food source, with both the meat of the bird as well as its large eggs providing a lifeline for the Māori. The bones of the bird were used to make ornaments and fishhooks, and even the shells of the giant eggs were used to carry water. The meat of the moa could be preserved and became a valuable trading good.

Archaeologists believe the moa was hunted to extinction by the fifteenth century. As a result, the Haast's eagle also disappeared into history. As you will see, this had a huge impact on the Māori people.

1.9.3 Let me do it

1.9 ACTIVITIES

1. Read **SOURCE 2** and follow steps 1 and 2 to make your own notes.
   After you have written your dot point notes, compare them with someone else in the class. You should both have similar information. To refine your note-making skills, continue practising using any of the text in this topic.

SOURCE 2 Taking notes on the hangi

The Māori diet was a combination of the cultivated vegetables brought from Polynesia, such as taro and yams, and the meat from birds, fish, dogs and rats. The abundance of seafood, including seaweed, dolphins, whales and seals, provided additional variety to the Māori meal. The village cooking was not done within the whare (house), but was generally a communal task done in an earth oven, known as *hangi* or *utu*. The men made the *hangi* by digging a deep pit and covering it with wood that was set alight. Large river stones placed on the wood pile became very hot and eventually fell into the pit. The hot stones were covered with baskets of food wrapped in wet leaves. Layers of soil and wet mats were piled over the food. The heat created steam from the wet leaves, which cooked the food over the course of a few hours.

The boiling pools and streams of the North Island region of Rotorua provided the Māori with another unique method of cooking. Small ovens were built around the vents where water and steam bubbled up through the ground. Food placed in these ovens was quickly cooked.

2. a. Explain how the concept of *rāhui* was used to manage natural resources.
   b. Given this information, explain why the moa became extinct.
3. How did the extinction of the moa have an impact on other aspects of the environment and on the Māori lifestyle?
4. Explain why the village cooking was not done indoors.
5. Explain how the preparation of food was an important communal activity for the Māori.
6. How did the Māori use natural resources to bring variety to their diet?

SOURCE 3 The taro, a Polynesian vegetable, was part of the Māori diet.

2 Emergence of the modern world in Europe

LESSON SEQUENCE

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LESSON 2.1 Overview

INQUIRY QUESTION

How did societies change in the Early Modern Period? What key beliefs and values influenced them? What were people's perspectives? Which significant ideas have influenced the world today and how have historians interpreted the period?

The period between 1500 and 1650 shaped the modern world in Europe. Revolutionary ideas and the invention of the printing press challenged old ways of thinking. The movement of people, through exploration and trade, fostered cultural exchanges that continue to resonate today.

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  Key terms glossary
- **Video eLesson**
  The emergence of the modem world

1445
Johannes Gutenberg produces the first European book on a printing press using moveable type.

1492
Christopher Columbus reaches the Americas in a sailing ship. Leonardo da Vinci designs a flying machine.

1519–22
A Spanish expedition commanded by Magellan and Elcano is the first to circumnavigate the world.

1531–32
The Church of England breaks away from the Roman Catholic Church.

1534
Jacques Cartier makes his first voyage to North America for France.

1553
Michael Servetus is burnt at the stake by order of the Protestant governing council of Geneva, Switzerland.

1440 1460 1480 1500 1520 1540 1560

CE

1473
The Spanish Inquisition is established.

1498
Vasco da Gama reaches India by sea.

1517
Martin Luther begins the Protestant Reformation.

1524–25
The German Peasants' War.

1536
The Inquisition is established in Portugal.

1543
Nicolaus Copernicus publishes *De Revolutionibus Orbium Coelestium*, the first book showing that the Earth is not the centre of the universe.

SkillBuilder

Use the SkillBuilder activities to develop these Historical concepts and skills:

- HISTORICAL QUESTIONS
- CHRONOLOGY
- USING HISTORICAL SOURCES
- CONTINUITY AND CHANGE
- CAUSES AND CONSEQUENCES
- HISTORICAL SIGNIFICANCE
- COMMUNICATING

1558
Beginning of the reign of Queen Elizabeth I in England.

1589–1613
William Shakespeare creates most of his known work.

1606
The first landing by Dutch sailors in Australia.

1609
Johannes Kepler publishes *Astronomia Nova (New Astronomy)*.

1633
Galileo Galilei is arrested for denying that the Earth is the centre of the universe.

1580 1600 1620 1640 1660 1680 1700 CE

1555
In Germany, under the Peace of Augsburg, it is agreed that each ruler has the right to determine the religion of his subjects.

1562–98
French wars of religion between Catholics and Huguenots (Protestants).

1600
The astronomer Giordano Bruno is burnt at the stake in Rome. By this year an estimated one million African slaves have been transported to Spanish and Portuguese colonies in the Americas.

1618–48
The Thirty Years War kills a third of Germany's people.

1642
English Civil War breaks out between the Parliament and monarchy.

LESSON 2.2 How do we know about the emergence of the modern world?

LEARNING INTENTION

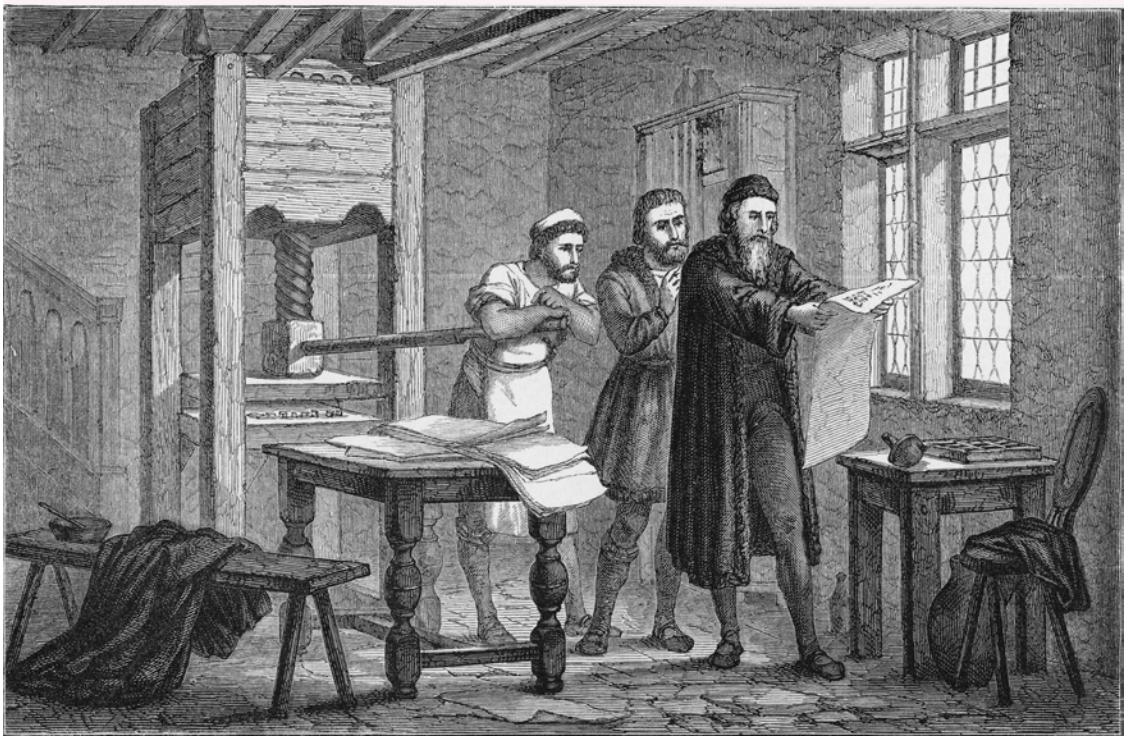
By the end of the lesson, you should be able to:

- **explain** how we know about Europe from 1500 to 1650
- **identify** key historical sources from this period
- **develop** skills in using historical evidence effectively.

Tune in

In medieval Europe, monks wrote most records, as the majority of people couldn't read. Between 1500 and 1650, many Europeans were still illiterate, but ideas spread among the educated. The printing press became key for sharing ideas. Although China had used movable type since the tenth century, Johannes Gutenberg (1398–1452) built Europe's first printing press between 1440 and 1452.

SOURCE 1 An artist's depiction of Johannes Gutenberg inspecting the first printed sheet of his Bible



1. **Explain how life would be different if all books still had to be copied by hand.**
2. **Describe what daily life would be like without the invention of printing.**
3. **Analyse the impact the printing press had on the spread of knowledge and literacy.**

2.2.1 Primary sources

We learn history from primary sources. Evidence from 1500 to 1650 is more abundant than for other ancient and medieval societies. The printing press helped by giving book printers the ability to produce many more copies. Some sources were lost, however, and many people couldn't read or write, leaving their ideas unrecorded.

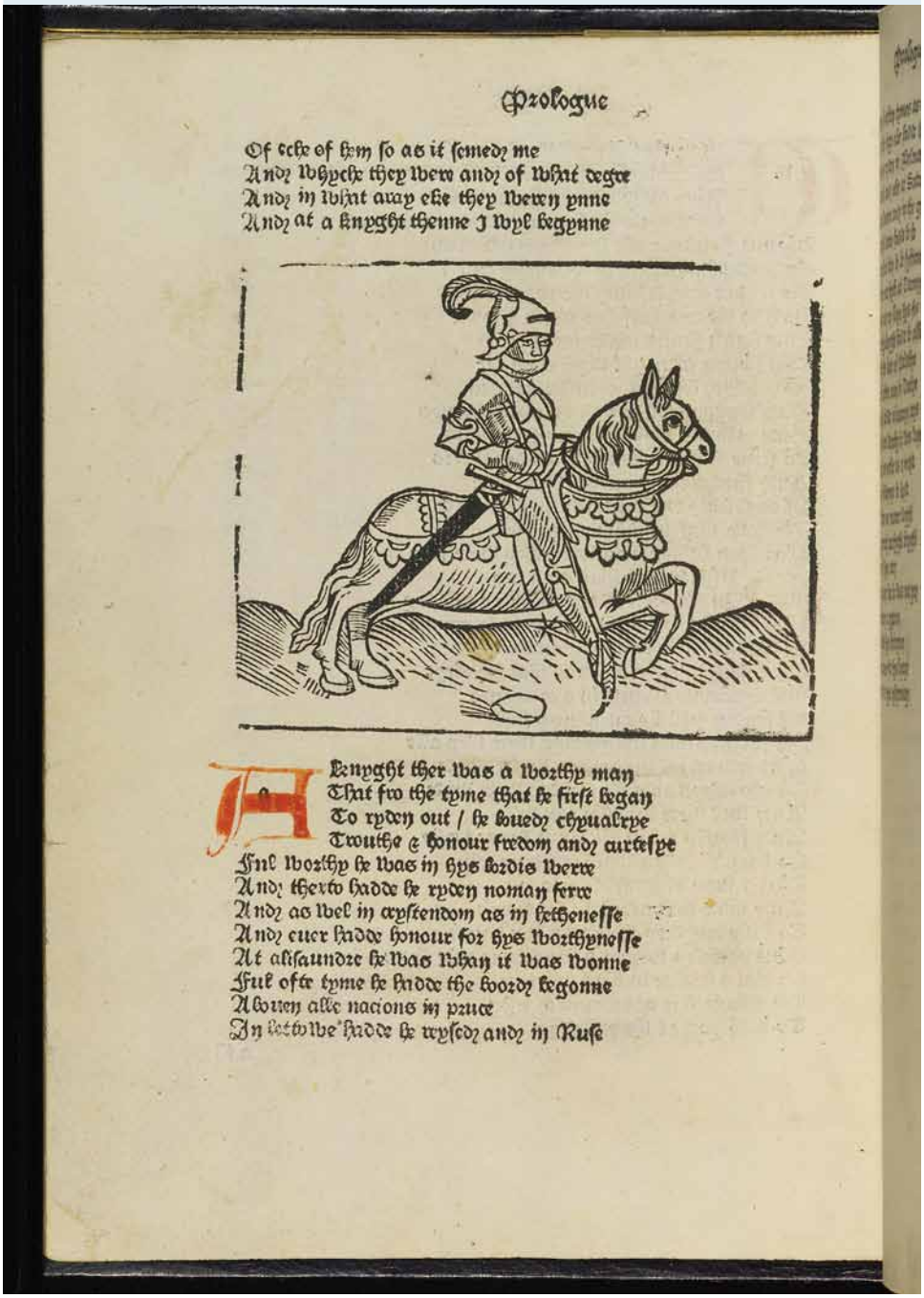
It is important to be cautious when trusting sources, as often only one side's view is recorded, especially in religious wars. Most written records from this period come from privileged groups, and show that bias.

SkillBuilder discussion

Historical questions

1. Discuss how the printing press affected historical sources' accessibility and reliability from 1500 to 1650.
2. Who might have access to a printing press and what impact might this have on records and information from this era?
3. How long did it take for the printing press technology to spread throughout Europe?

SOURCE 2 Prologue page of the Canterbury Tales, printed by William Caxton who brought the printing press back to England in 1476. Caxton became the first English printer.



Prologue

Of eche of hym so as it semedy me
And wyche they were and of what degre
And in what aray eche they were ynne
And at a knyght thenne I wyl begynne

Archaeological sources

We have many archaeological sources from this time. They show religious beliefs, like Catholic and Protestant churches, and religious art. Other remains reveal everyday life, work and trade, including towns, walls, marketplaces and weapons, highlighting the constant presence of war.

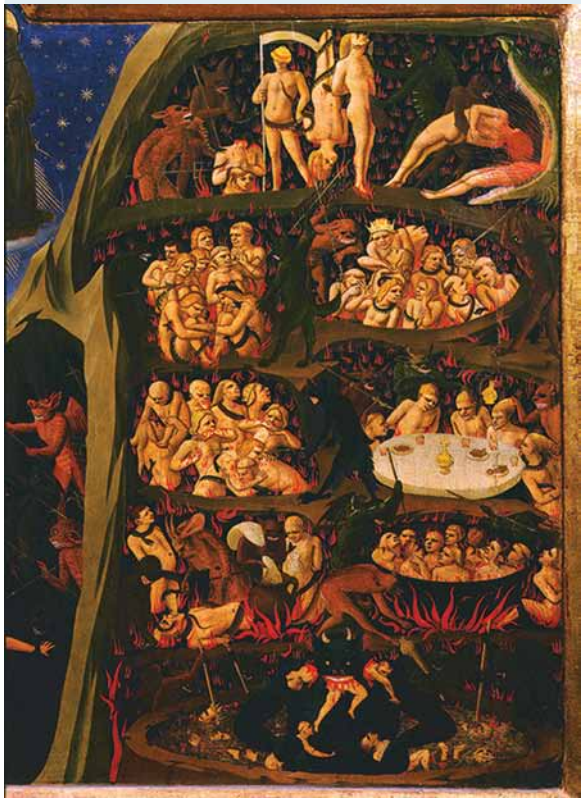
Using the sources

You will begin to understand this period after seeing a few sources. To analyse a source, ask historical questions:

- What is this source about?
- When was it made or built?
- Where is it from?
- Who created it?
- Why does it exist?

Woodcuts are another source commonly used to tell us about a particular era or event. It is essentially a printing technique, where an image is carved into a wooden block, inked and pressed on fabric or paper. The method originated in China as early as the ninth century and, though not a new invention, became popular in the fifteenth century across Europe.

SOURCE 3 Detail from the artist Fra Angelico's painting *The Last Judgement*, 1432–35



SkillBuilder discussion

Using historical sources

1. What are the peasants giving to their lord?
2. What is the relationship between the peasants and the lord in the image?
3. Who do you think might have produced this woodcut and what were they trying to show?

SOURCE 4 A fifteenth-century woodcut shows peasants paying taxes to their lord in both money and livestock.

2.2 SkillBuilder activity USING HISTORICAL SOURCES

Identify the origin, content, context and purpose of primary and secondary sources by **examining SOURCE 5**.

SOURCE 5 Christopher Columbus's journal, written for the King and Queen of Spain during his 1492 voyage, records his accidental discovery of America.

Your Highnesses, as Catholic rulers against **doctrine of Mahomet**, **idolatry** and heresy, sent me, **Christopher Columbus**, to India. My mission was to meet the princes and convert them to Christianity. You ordered me to take a new westerly route instead of the usual eastern path. In the same month you expelled the Jews, you commanded me to sail with enough ships to reach India.

1. **Identify** who commissioned Columbus for this voyage.
2. **Describe** the attitudes toward Muslims, Jewish people and other non-Christians during this time.
3. **Identify** when Columbus's voyage occurred.
4. **Explain** the direction in which Columbus was instructed to sail in order to reach India.
5. **Refer** to a world map to discover which undiscovered continent obstructed his path.

2.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 7	6, 8

REMEMBER AND UNDERSTAND

1. **Identify** the reasons why written sources from this period are likely biased.
   A. Only educated people could read and write.
   B. All educated people shared the same views.
   C. Ideas spread through printed books.
   D. Religious conflicts could lead to propaganda.
2. Determine whether the following statement is True or False. The printing press helped preserve many books and pamphlets from this period.
3. **Examine** the archaeological sources and **identify** what aspects of this period they each evidence.
   A. Markets
   B. Weapons
   C. Towns
   D. Churches
4. **Explain** why there are gaps in historical evidence from this period.

ANALYSE AND APPLY

5. Analyse **SOURCE 3** by answering the following questions:
   a. **Explain** who created it, and when.
   b. **Suggest** why it was made.
   c. Look closely at **SOURCE 3** and describe the tortures in hell. **Explain** how belief in this afterlife might have influenced people's actions.
6. Examine **SOURCE 4**:
   a. **Explain** how you can tell the peasant is paying in both money and livestock.
   b. **Suggest** how he might feel about paying taxes in feudal tradition and cash.
   c. **Explain** why peasants were likely to rebel.

EVALUATE AND COMMUNICATE

7. **Propose** which groups in European society are least likely to have their views recorded in written sources.
8. **Explain** what conclusions can be drawn from the **SOURCES 2**, **3**, **4** and **5** about this period.

Answers and sample responses for this topic are available online.

LESSON 2.3 What caused economic and social change in the Early Modern Period?

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **explain** how economic changes transformed the medieval world
- **describe** how town and city growth shaped modernity
- **discuss** how trade expansion drove the shift to the modern world.

Tune in

In **SOURCE 1**, the writer questions how we should understand the causes of major changes from 1500 to 1650.

SOURCE 1 From Roland H. Bainton, *The Age of the Reformation*, New York, 1956, p. 4

> The Age of the Reformation was an age of upheaval. With regard to every such era dispute arises as to whether events precipitated ideas or ideas incited events. Undoubtedly travel, discovery, invention and the consolidation of power prompted reflection about institutions and about the ultimate problems of life.

Discuss these questions with the class:

1. **What does the author suggest about whether events caused changes in ideas, or if ideas caused events?**
2. **Can you think of a modern example where we wonder if events shape ideas or if ideas drive events?**

2.3.1 Economic changes

The period 1500–1650 is often described as a time of transition from the medieval system of **feudalism** to the modern system of **capitalism**. In feudalism, **vassals** held land in return for services to their **lords**, who were supposed to provide them with protection. Capitalism is the modern economic system in which production and trade are privately owned for profit.

In the early 1300s, wars, the Black Death (bubonic plague) and the Little Ice Age reduced Europe's population, causing famine. After 1350, the number of towns grew again and some towns and cities grew wealthy and powerful.

For most people, life from 1500 to 1650 seemed unchanged, though few people could have been aware that the changes that were happening would have such enormous consequences. Many changes began in Europe. Discovering new lands, like the Americas, sparked a **commercial revolution** led by Portugal. By the mid-sixteenth century, Portugal had trading posts in Africa, the East Indies, India and Brazil. Spain followed, claiming much of the **New World**.

The Price Revolution

Merchants benefited most from the commercial revolution. They improved transport, trade and finance, making businesses more efficient with support from rulers. Merchants in Germany formed *hanses* (guilds), and a network of these guilds called the Hanseatic League dominated trade in Germany, northern Russia and Scandinavia.

As merchants became wealthy, the poor grew poorer. From the late fifteenth century, Spain and Portugal imported silver and gold from the Americas, driving Europe's Price Revolution and causing inflation. Between 1460 and 1620, Europe's population rose, increasing demand for goods and food. Big landowners benefited, while the poor struggled with hunger due to rising prices.

SkillBuilder discussion

Using historical sources

1. How does Joss Amman's woodcut (**SOURCE 2**) illustrate the economic activities and social roles of 1500–1650?
2. What can you infer about the importance of bookkeeping and business practices from **SOURCE 2**?
3. How do the roles of merchants and money changers in **SOURCE 2** reflect the broader economic changes in Europe during this period?

SOURCE 2 Trade, merchants and money changers, a c. 1539 woodcut by Joss Amman. During this time, hundreds of publications on business bookkeeping were sold.

2.3.2 Social classes

By 1500 CE, several social classes in Europe were unhappy with economic changes:

- **Townspeople** who succeeded in business gained power. **Patricians** (three per cent of the population) controlled economies and lived like **nobles**.
- **Craftsmen** (90 per cent of towns) included guild masters, journeymen and traders. They often revolted when guilds lost control of trade.
- **Day labourers** and servants were poor and suffered due to the Price Revolution.
- **Peasants** remained poor but were becoming literate and interested in reform. Wealthy townspeople invested in agriculture, and rulers imposed new taxes, sparking peasant revolts.
- The **feudal aristocracy (nobles)** lost importance but held onto medieval privileges. **Knights** became army officers or **robber barons**.
- The **higher clergy** grew richer, causing resentment, while the **lower clergy** stayed poor.

2.3 SkillBuilder activity USING HISTORICAL SOURCES

Identify the origin, content, context and purpose of primary and secondary sources by examining **SOURCE 3**.

SOURCE 3 From Harold J. Grimm, *The Reformation Era 1500–1650*

... a new attitude toward economic matters manifested itself among businessmen which may be called the '**capitalist spirit**'. Since money was no longer loaned primarily to assist those who were in need, but also loaned for profit, the Biblical [restrictions] ... and other restrictions upon usury were ... ignored. The new spirit began to touch nearly every phase of European life. Feudal services and dues were commuted to money payments; agricultural production came to be looked at as a means of making profit; merchants and even some nobles invested accumulated surpluses in commercial and industrial enterprises; entrepreneurs began to own raw materials, warehouses and the means of production; labor was hired as a means of creating new wealth; territorial rulers sought to increase the decline of the medieval economy ... and its many regulations designed to give people 'a fair living' and goods sold at 'a just price', and with the greater opportunities to make money their power by tapping all available sources of income; and even church offices and means of grace were frequently viewed in terms of financial returns. ... The older chivalric virtues of honor and personal loyalty were gradually supplanted by the middle-class virtues of honesty, industry and integrity; and the medieval sense of corporate responsibility gave way to an emphasis upon individual initiative.

Source: Harold J. Grimm, *The Reformation Era 1500–1650*, Macmillan, New York, 1965, p. 12.

1. **Identify** what Grimm calls the new attitude of businessmen towards economic matters.
2. **Explain** what you think he means by 'the capitalist spirit'.
3. **Describe** what changed in investment in agriculture and industrial production.
4. **Analyse** how personal virtues were changing.

2.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4	5, 6, 8	7, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** when populations began to recover from the losses caused by plagues, famines and wars.
   - A. Mid-thirteenth century
   - B. Early twelfth century
   - C. Eighteenth century
   - D. Mid-fourteenth century
2. Where did the Hanseatic League dominate trade?
   - A. Britain, Germany and Italy
   - B. Germany, northern Russia and Scandinavia
   - C. Portugal, northern Russia and Spain
   - D. India, Scandinavia and Germany
3. **Complete** the sentence: Merchants improved transport by _____ and _____. They improved commerce and were assisted by rulers of _____, _____ and _____.
4. **Identify** the parts of the world where Portugal had trading posts by the mid-sixteenth century.

ANALYSE AND APPLY

5. **Explain** why the medieval craft guilds opposed changes in trade.
6. **Identify** three social classes who had reasons to resent the economic changes that were taking place.
7. **Describe** the scene in **SOURCE 2**.
8. **Explain** what evidence **SOURCE 2** provides for a changing economic system, in which bookkeeping and money changing had become more important.

EVALUATE AND COMMUNICATE

9. **Examine SOURCE 3**. *Usury* means making people pay interest on borrowed money. It was considered sinful by Christians in the Middle Ages. **Discuss** what this source suggests about changes in attitudes to usury and to making profits.
10. **Suggest** why a changed attitude to usury and profit-making would have been essential for a modern capitalist system to emerge.

Answers and sample responses for this topic are available online.

LESSON 2.4 How did the Protestant Reformation bring about change?

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **explain** how the Reformation began in the sixteenth century
- **identify** key events that led to the Reformation.

Describe the major consequences of the Reformation.

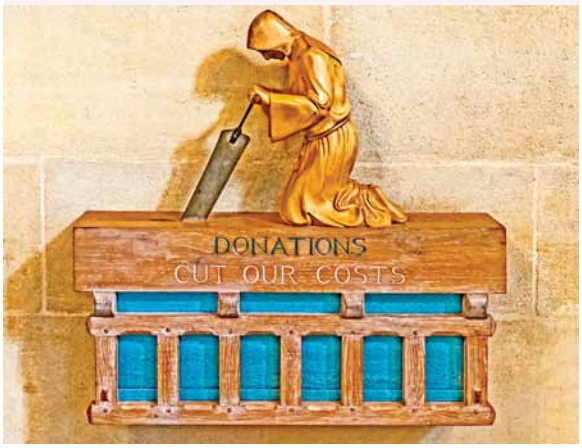
Tune in

If your religion focused more on making money than teaching and caring for followers, how would you feel?

Consider the following questions and discuss your answers with your class:

1. **Would you leave or try to change the religion?**
2. **Is it easier to change or leave a religion now compared to the sixteenth and seventeenth centuries?**

SOURCE 1 A donation box in a church in Bury St. Edmunds, UK



2.4.1 Martin Luther challenges the Church

Religious beliefs heavily influenced Early Modern European thought, especially in northern Europe, where **Humanist** ideas prompted questioning of the Church's authority. The Catholic Church lost influence in the sixteenth century, and the Reformation, intended to reform the Church, led to lasting divisions in Western Christianity.

Martin Luther, a German Catholic monk and professor at Wittenberg University, believed some Church teachings were wrong. He felt the Church prioritised money over saving souls. He opposed the selling of **indulgences** (paying to help a soul enter heaven) (see **SOURCE 2**) and the sale of Church positions. He also thought it impractical that priests were not allowed to marry, as he observed that many priests, who vowed to be chaste, lived with partners, thus breaking their vows of **chastity**.

Luther's *Ninety-Five Theses* included these ideas:

1. Popes, bishops and priests are not superior to other Christians.
2. The sale of indulgences is a corrupt practice; only God decides punishments for sins and who enters heaven.
3. Priests should be allowed to marry.
4. Salvation (ability to enter heaven) does not come from following Church practices.
5. Faith in Jesus Christ is the only way to be saved.
6. Christians do not need priests to connect with God.

SkillBuilder discussion

Using historical sources

1. What does Jorg Breu's woodcut reveal about the Pope's representatives' interaction with Catholic townspeople during the sale of indulgences?
2. How might the image reflect Martin Luther's criticisms of the Church's sale of indulgences?
3. How can this historical source help us understand the social and religious context of the sixteenth century?

SOURCE 2 A woodcut by Jorg Breu, c. 1530, showing the Pope's representatives selling indulgences to Catholic townspeople

SkillBuilder discussion

Continuity and change

1. How would Martin Luther's *Ninety-Five Theses* have challenged Catholic Church practices on indulgences and authority?
2. Discuss how Luther's *Ninety-Five Theses* signals a shift in religious beliefs and practices from the sixteenth century to the Reformation.
3. How did the changes initiated by Luther affect the relationship between the Church and the people in the following decades?

SOURCE 3 Luther fastening his *Ninety-Five Theses* to the Wittenberg Cathedral door on 31 October 1517

2.4.2 Why did Luther and his followers survive?

In the past, people who challenged the Church were called **heretics** and were burned alive. In 1520, the Pope declared Luther a heretic and **excommunicated** him in 1521. However, Luther quickly gained many supporters, called Protestants because they protested against the Catholic Church. His followers became known as Lutherans.

Luther's ideas spread through printed pamphlets, gaining support from several German rulers. Inspired by Luther's revolt, many oppressed peasants rose up against feudal lords in 1525, attacking castles. However, Luther opposed this social revolution and urged rulers to crush it (see **SOURCES 4** and **5**). After their defeat, the peasants turned away from Lutheranism.

SOURCE 4 Peasants burning and looting during the Peasants' War, 1524–25

2.4.3 New forms of Protestantism

Other forms of Protestantism soon emerged. In Switzerland, John Calvin formed a church that replaced bishops and priests with elected ministers. Calvinists believed only some people were chosen to be saved, while the rest were doomed to hell. Calvinism spread to parts of France, Germany, the Netherlands and Scotland.

Among other Protestants were the Anabaptists, who rejected the baptism of children, reasoning it would make more sense for them to choose whether they wanted to be baptised as adults. The Church of England also broke away, not due to Protestant ideas but because the Pope refused King Henry VIII a divorce. Henry declared himself head of the English Church, and after his death, Protestant ideas began to dominate it.

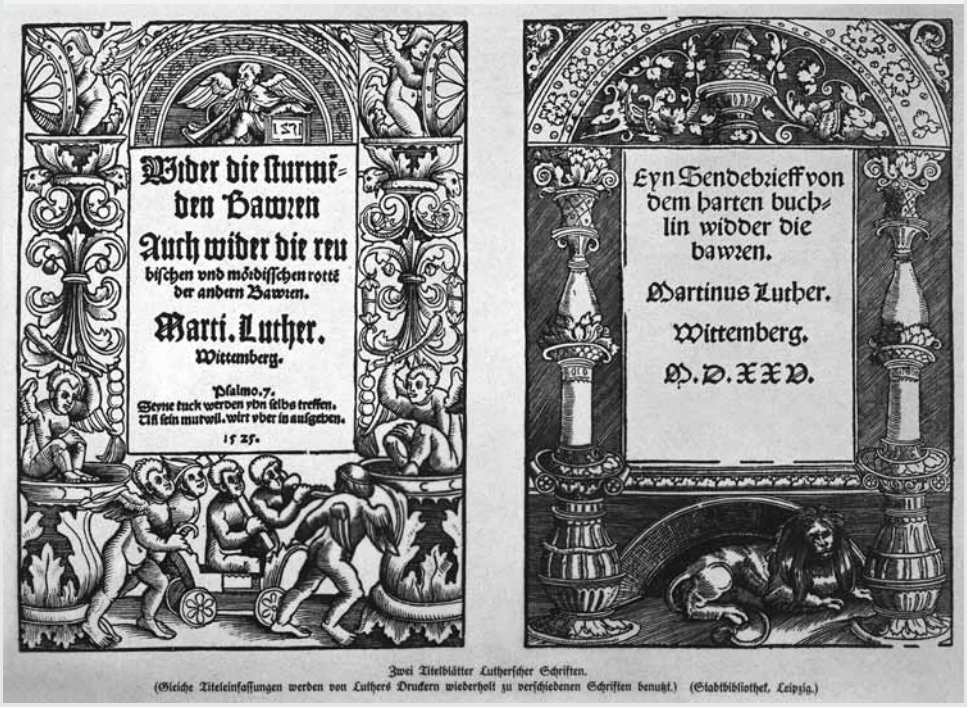
2.4.4 The Catholic Reformation

From the twelfth century, the Catholic Church used the **Inquisition** to punish heretics. As Protestantism spread in northern Europe, Catholic leaders realised persecution alone wouldn't stop it. Starting in 1545, the Church worked to end corruption and promote Catholic beliefs. The Society of Jesus (Jesuits) became one of its strongest defenders, focusing on converting heretics and non-believers. Jesuit priests set up missions, schools and colleges in Africa, Asia and the New World (the Americas), where they converted many Native Americans. This reform is called the Catholic Reformation by Catholics and the Counter-Reformation by Protestants.

2.4 SkillBuilder activity **HISTORICAL SIGNIFICANCE**

Identify the perspectives, attitudes and values of the past based on Luther's pamphlet (the front cover is shown in **SOURCE 5**).

SOURCE 5 The front page of Luther's writings *Against the Storming Peasants*, 1525, left, and *An Open Letter on the Harsh Book Against the Peasants* (right)



Zwei Titelblätter Lutherscher Schriften.
(Gleiche Titeleinfassungen werden von Luthers Druckern wiederholt zu verschiedenen Schriften benutzt.) (Stadtbibliothek, Leipzig.)

In his pamphlet, Luther condemned the rebellious peasants as doing the work of the devil. He urged princes to be 'both judge and executioner'. He claimed, 'To knock down, strangle, and stab ... an insurgent ... Such times are these that a prince can merit heaven better with bloodshed than a prayer.'

1. **Identify** Luther's attitude towards the rebellious peasants.
2. **Explain** why a reformer who fought against corruption would not support the peasants, given that princes gained wealth while peasants paid taxes.
3. **Suggest** how Luther's belief in the 'divine right of kings' and his need for rulers' support explain his view of rebellions.

2.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 6, 8	7, 9, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statement is True or False: The Reformation began as an attempt to reform the Roman Catholic Church.
2. **Identify** which powerful people supported Luther.
   A. The peasants
   B. The Pope and clergy
   C. German rulers
   D. King Henry VIII
3. Complete the passage: Luther opposed the Church's practice of selling _____ that required people to _____ to get their loved ones into _____. He believed that _____, _____ and priests were not superior to other Christians.
4. **Outline** the Pope's response to Luther's demands.
5. **State** one idea of the Calvinists and one of the Anabaptists.
6. **Explain** what changes were made by the Catholic Reformation.

ANALYSE AND APPLY

7. **Explain** how England's break with the Roman Catholic Church was different from experiences in other countries.
8. **Examine SOURCE 2** and **explain** why this practice caused resentment towards the Catholic Church.

EVALUATE AND COMMUNICATE

9. **Identify** three of Luther's arguments and suggest why each threatened the power of the Catholic Church.
10. Examine **SOURCES 4** and **5**. **Examine** why the collapse of the peasants' revolt led to a loss of support for Lutheranism.

Answers and sample responses for this topic are available online.

LESSON 2.5 How did the power of rulers change in Early Modern Europe?

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **examine** the changes in the roles and the powers of rulers
- **analyse** how rulers used religion to benefit from war.

Tune in

In **SOURCE 1**, the cook, the chaplain and Mother Courage discuss the Thirty Years' War, in which territorial rulers claimed to fight for religious reasons.

SOURCE 1 Bertolt Brecht's play *Mother Courage and Her Children*, written in 1939, protests the rise of the German Nazis and their role in World War II. The play is set during the Thirty Years' War (1618–48).

The Cook: It's a war all right in one sense, what with ... murder and looting and the odd bit of rape thrown in, but different from all the other wars because it's a war of faith.

Can you identify a modern example where people used religion to justify war and atrocities? Discuss your thoughts as a class.

2.5.1 The territorial states

In western Europe, states became kingdoms, principalities and city-states. Townspeople wanted to end feudal lords' privileges. Territorial rulers helped towns gain freedom from nobles and protected them in exchange for taxes and services, which gave the territorial rulers absolute power.

Advances in war technology, like gunpowder, guns and cannons, made infantry and artillery more effective than knights. The territorial rulers replaced feudal armies with mercenaries and sought prosperous territories where they could collect taxes. They also controlled religion in their lands. We will explore how the powers of rulers changed in Germany, France, England, Spain and Russia.

SOURCE 2 Soldiers plundering a farm during the Thirty Years' War, by Sebastiaen Vrancx, 1620

2.5.2 Germany

Germany had over 300 political states in the Holy Roman Empire, formed in 800 CE when Pope Leo III crowned Charlemagne the emperor. Centuries later, under Emperor Maximilian I, it became the Holy Roman Empire of German Nations in 1512. After the Reformation, German Catholics and Protestants

often fought. The Peace of Augsburg in 1555 divided the Empire into Catholic and Protestant states, with rulers choosing their subjects' religion.

The worst conflict was the Thirty Years' War (1618–48), which began as a religious war between Protestant and Catholic German states but soon became about territory, wealth and power. Sweden, Denmark, the Dutch Republic, Spain and France joined, driven by greed. Soldiers committed atrocities like rape, mutilation and murder. The war caused 4.5–8 million deaths, including those of 3.5–6.5 million civilians, who also died from diseases such as typhus and bubonic plague, and famine due to soldiers stealing their food. The war ended in 1648, but Germany didn't unite until the late nineteenth century.

SkillBuilder discussion

Chronology

1. What do you think was the most significant event of the Thirty Years' War in 1631?
2. When did the Thirty Years' War begin and end?
3. What year was the Holy Roman Empire of German Nations formed?

SOURCE 3 In 1631, the Protestant city of Magdeburg was besieged, sacked and burned by Catholic forces during the Thirty Years' War. This event marked a brutal attack on the city and its people.

2.5.3 France

By 1500, the king controlled the French government. The Estates-General, representing clergy and nobles, gave the king the power to tax the people, which gave him absolute power. Religious wars between Catholics and Calvinists (called Huguenots) lasted from 1562 to 1598. The most famous event was the St Bartholomew's Day massacre on 24 August 1572, when Catholics killed around 20 000 Huguenots in a planned attack across several cities. Despite this, France joined the Thirty Years' War on the Protestant side in 1635, due to its rivalry with the Catholic Spanish and Austrian Hapsburg dynasties.

2.5.4 England

English rulers didn't have absolute power as England had a Parliament, which represented the privileged classes. Henry VII (1485–1509) replaced rebellious nobles with officials. His successor, Henry VIII, had a strong central government but used Parliament to maintain power. In 1533, Henry VIII defied the Pope, divorced Catherine of Aragon and married Anne Boleyn. When the Pope excommunicated him, Henry broke from Rome and founded the Church of England, of which he declared himself the head. He dissolved monasteries, selling their lands for his own wealth. Henry became King of Wales through the Acts of Union (1536–43) and King of Ireland in 1541. He was a brutal ruler, executing Anne Boleyn and later his fifth wife, Catherine Howard.

When Henry VIII died in 1547, his ten-year-old son, Edward VI, became king but died six years later. He was succeeded by Mary I, daughter of Catherine of Aragon, a devout Catholic. She tried to restore Catholicism and executed over 300 Protestants. Mary died without an heir in 1558.

SkillBuilder discussion

Historical significance

Discuss the main effects of Henry VIII's separation from the Catholic Church and the creation of the Church of England.

SOURCE 4 Henry VIII and Anne Boleyn, engraved by Johann Raab

Mary's half-sister, Elizabeth I (1533–1603), became queen. Under Edward and Elizabeth, the Church of England became Protestant. Elizabeth never married, so after her death, James I of Scotland, her closest Protestant relative, became king, followed by his son, Charles I. Charles clashed with Parliament, leading to the English Civil War. In 1645, Parliament's New Model Army defeated the Royalists. Charles was tried and executed in January 1649.

England became a republic after Oliver Cromwell, commander of the New Model Army, was named Lord Protector in 1653. After Cromwell's death in 1658, his son Richard succeeded him. The monarchy was restored in 1660 but lost much power to Parliament. Over the next 30 years, the monarchy could not suspend laws, levy taxes, raise an army without consent, interfere with elections or punish members for their debates.

SOURCE 5 Oliver Cromwell made his first speech in Parliament on 2 March 1629

2.5.5 Spain

After the marriage of Princess Isabella of Castile and Prince Ferdinand of Aragon in 1469, much of Spain became one kingdom. The rest of the Iberian Peninsula included Portugal and Navarre. Ferdinand and Isabella suppressed the nobles and reduced the powers of the Cortes (assemblies). In 1473, with the Pope's support, they established the Spanish Inquisition.

In 1492, they expelled Muslims from Spain and forced Jewish people who wanted to stay to convert to Catholicism. The Inquisition targeted converted Jews and Muslims suspected of heresy. In 1506, Spain took control of Navarre, unifying the peninsula except for Portugal. The rulers of Portugal strengthened royal power using methods similar to those of Spain.

2.5.6 Russia

After Constantinople fell to the Turks in 1453, the Grand Prince of Muscovy declared Moscow the new religious capital of Orthodox Christianity. Ivan III (1462–1505) became tsar (caesar) and expanded his power by conquering weaker Russian states. Under Ivan IV, 'Ivan the Terrible' (1553–1584), the tsar's power grew as he controlled and killed many boyars (the high aristocracy).

Russia, as an Orthodox Christian nation, was unaffected by Catholic–Protestant conflicts.

However, from 1598 to 1613, it faced the 'Time of Troubles', with civil wars and invasions from Poland and Sweden, supported by boyars. About a third of Muscovy's population died. In 1613, Michael Romanov became tsar and thus founded the Romanov dynasty. The Time of Troubles led to support for absolute tsarist power. In 1649, the government made all peasants serfs, removing their right to leave the land, leading to many peasant rebellions.

2.5 SkillBuilder activity USING HISTORICAL SOURCES

Consider SOURCE 2, showing soldiers plundering a farm during the Thirty Years' War, by Sebastiaen Vrancx, 1620.

1. **Identify** the figures that are soldiers and explain how you recognise them.
2. **Determine** what they are stealing.
3. **Analyse** how stealing food would affect the farming family's chances of survival.
4. **Interpret** the evidence on which this artwork is based.

2.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4	5, 6, 9	7, 8, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statement is True or False. Townspeople in western Europe supported territorial rulers against the nobles.
2. **Identify** the event that divided the Holy Roman Empire into Catholic and Protestant states in 1555.
   A. The Thirty Years' War
   B. The Peace of Augsburg
   C. The Reformation
   D. The crowning of Charlemagne

3. Complete this passage: Due to advances in war technologies, such as _____, guns and cannons, _____ and _____ became more effective than cavalry from _____. Thus, territorial rulers replaced knight armies with _____ armies.

ANALYSE AND APPLY

4. **Explain** the motives of rulers for entering the Thirty Years' War.
5. **Describe** what happened during the St Bartholomew's Day Massacre in France.
6. **Analyse SOURCE 4**.
   a. **Explain** what it is about.
   b. **Explain** when it was created.
   c. **State** who created it.
   d. **Suggest** how it would differ if it were made after Henry VIII had Anne killed.
7. **Describe SOURCE 5** and **explain** Oliver Cromwell's significance to England's government.
8. **Identify** the countries in which the powers of territorial rulers were strengthened.

EVALUATE AND COMMUNICATE

9. **Describe SOURCE 3** and **justify** which side's perspective it shows.
10. **Discuss** what changed and what remained unchanged in the powers of rulers during this period.

Answers and sample responses for this topic are available online.

LESSON 2.6 What were the achievements of the Scientific Revolution?

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **explain** the importance of the Scientific Revolution, the scientific theories and discoveries
- **describe** the dangers faced by scientific thinkers during this time.

Tune in

When Marco Polo, an Italian merchant and explorer, visited China in the thirteenth century, he was amazed by its wealth and culture. Nothing in Europe compared to it.

At that time, no one could imagine that western Europeans would colonise new unknown continents in the next few centuries, or how Europe would dominate the world.

Discuss what could have caused such a big change.

SOURCE 1 An artist's impression of Marco Polo being welcomed to the court of Kublai Khan

2.6.1 Who were the great scientific thinkers?

During this time, religion, arts and science were connected. A scholar could be a priest, scientist, artist and inventor. The Renaissance brought about a Scientific Revolution, encouraging people to challenge traditional beliefs and authority by using observation and reason. Table 1 shows some of the most famous thinkers of the time.

SkillBuilder discussion

Historical significance

1. What significant discoveries might Copernicus have made while observing the night sky with his telescope?
2. In what ways did Copernicus's observations influence other scientific thinkers of the age, and what impact did this have on the development of modern science?

SOURCE 2 Copernicus observing the night sky with his telescope

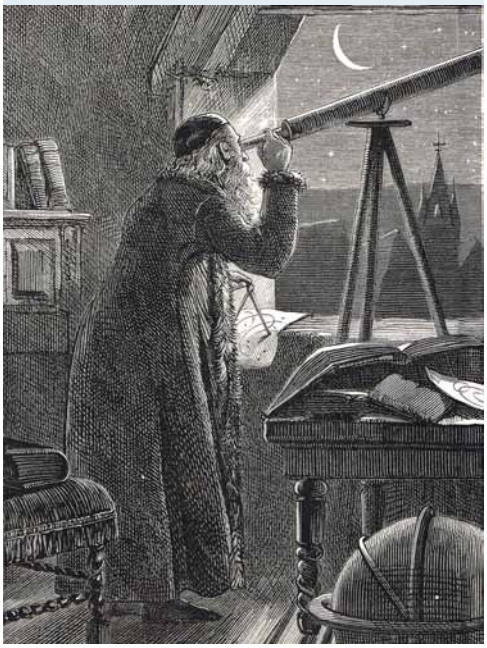


TABLE 1 Some of the well-known scientific thinkers of the age

Name	Years	Field	Contributions
Leonardo da Vinci	1452–1519	Art, biology, anatomy, geology, engineering, maths, music	Produced iconic paintings such as the 'Mona Lisa', drew detailed anatomical drawings of the human body, designed a flying machine, a helicopter and a parachute.
Nicolaus Copernicus	1473–1543	Astronomy	Developed the theory that Earth revolves around the Sun, published in 1543
Andreas Vesalius	1514–1564	Anatomy	Published book on human body in 1543, a major advance in the study of anatomy
Giordano Bruno	1548–1600	Astronomy	Recognised Sun as one of many stars, expanded on Copernicus's ideas
Galileo Galilei	1564–1642	Astronomy	Developed the telescope, proved Copernicus's theory, published findings in 1632
Girolamo Fracastoro	1478–1555	Medicine	Discovered that diseases spread through germs
Miguel Servet	1511–1553	Medicine	First in Europe to describe blood circulation
Johannes Kepler	1571–1630	Astronomy	Known for laws of planetary motion, helped Newton develop his theory of gravity
Isaac Newton	1643–1727	Physics	Famous for laws of motion and discovery of gravity

2.6.2 The dangers faced by scientific thinkers

In medieval Europe, religion controlled all aspects of life and explained the world. Challenging religious ideas could be dangerous at this time, but the Church often supported scientific advances. However, it punished **heresy**.

- Giordano Bruno was burned at the stake in 1600.
- Galileo was arrested in 1633, forced to publicly renounce his scientific theories, and spent the rest of his life under house arrest.
- Miguel Servet was persecuted by both Catholics and Protestants and burned at the stake.

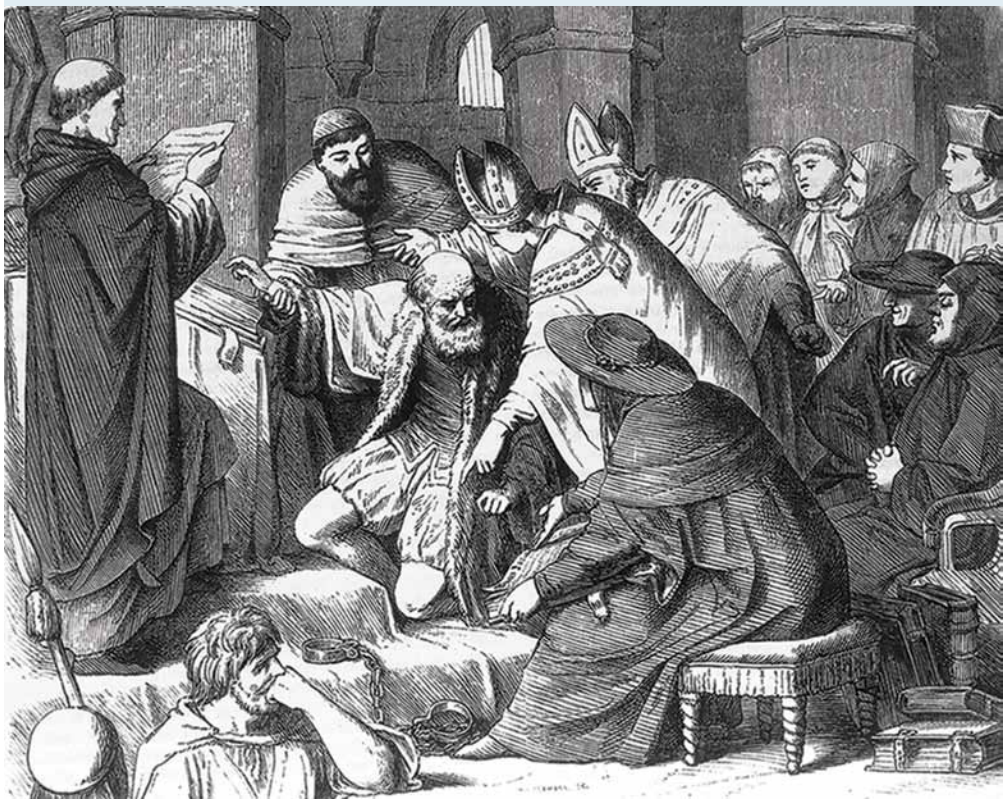
Ultimately, the Scientific Revolution weakened powerful institutions. The printing press spread ideas widely, breaking the societies' earlier reliance on small groups (such as Church and clergy) for knowledge. With the Bible printed in various languages, people could read it independently, which started a new era of learning.

SkillBuilder discussion

Continuity and change

1. Identify the key events in the image of Galileo facing the Inquisition.
2. Explain why Galileo's scientific ideas conflicted with the Church.
3. Discuss the significance of the individuals around Galileo in the context of changes in scientific thought.

SOURCE 3 Galileo Galilei facing the Roman Catholic Inquisition, 1633



2.6.3 The Enlightenment

Centuries after the Scientific Revolution, the terms *Enlightenment* (referring to intellectual and philosophical growth) and *Renaissance* (meaning rebirth of classical ideas and thinking) were introduced to describe those eras. Europeans made new discoveries and expanded knowledge during this time. These discoveries led people to question life before the 'Age of Reason'. For the first time, the Church's authority, the power of kings and old beliefs were challenged. In response, those in power used harsh methods to maintain control.

2.6 SkillBuilder activity HISTORICAL PERSPECTIVES AND INTERPRETATIONS

- **Describe** how Copernicus studied the skies and proposed that the Earth orbits the Sun in **SOURCE 2**.
- **Explain** how his theory contradicted the Catholic Church, which claimed the Earth was the universe's centre.
- **Determine** how Bruno's claim about the Sun and Galileo's confirmation of Copernicus's theory advanced our understanding of the universe.

2.6 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4, 6	5, 7, 6	8, 9, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statement is True or False. Andreas Vesalius studied dead bodies without breaking the Catholic Church's rules.
2. **Determine** whether the following statement is True or False. Leonardo da Vinci worked in many different sciences.
3. Fill in the blanks: Nicolaus Copernicus, a Polish_____, theorised that the Earth revolved around _____, challenging the Church's belief that _____ was at the centre. Galileo Galilei used a _____ to prove Copernicus was right. Giordano Bruno expanded on this, realising the Sun was just one of many stars.

ANALYSE AND APPLY

4. **Explain** what new attitudes came from the Scientific Revolution and the Enlightenment.
5. **Explain** how the Catholic Church felt about the new ideas that came from the Scientific Revolution and the Enlightenment.
6. **Outline** how Vesalius studied human bodies despite the Church's rules.
7. Look at **SOURCE 3**.
   a. **Explain** what is happening in this source.
   b. **Explain** why Galileo is on trial.
8. Look at **SOURCE 3**. Miguel Servet was executed for his religious beliefs, not his science. **Suggest** why he was killed so brutally.

EVALUATE AND COMMUNICATE

9. **Explain** the different views of **Galileo** and his persecutors.
10. **Discuss** how science and religion were connected in the **Early Modern Period** and how this made it dangerous for scientists.

Answers and sample responses for this topic are available online.

LESSON 2.7 Inquiry: What are the different interpretations of issues in pre-Modern Europe?

LEARNING INTENTION

By the end of this lesson, you should be able to **explain** why there are different interpretations of historical events.

Background

In the Early Modern Period, sharing new ideas was risky because religious and other institutions resisted change and could punish people harshly. Many debates arose about changes during this time. **SOURCES 1** and **2** show two historians with different views on the roles of groups in causing the Reformation.

SOURCE 1 Summary of the argument of H. Holborn, 'The Social Basis of the German Reformation', Boston, 1962

Holborn argues:

- Capitalism grew but didn't greatly affect the sixteenth century.
- The newly rich wanted to join the nobles, not overthrow them.
- The clergy heavily influenced peasants, driving the Reformation.
- The poor followed clergy for religious reasons, not class reasons.

SOURCE 2 Summary of the argument of P.C.G. Walker, 'Capitalism and the Reformation', L.W. Spitz, *The Reformation. Material or Spiritual?* Boston, 1962

Walker argues:

- Capitalism existed in Europe before the Protestant Reformation, but old economic systems didn't fit its needs.
- The Price Revolution from about 1520 to the 1540s pushed wealthy townspeople to become the ruling class.
- They aimed to gain capital by ending feudalism and taking feudal property.
- Reformation was driven by social class interests and the rise of capitalism.

In this inquiry, you will identify perspectives and explain historical interpretations.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel. Use it to guide your work. After finishing, you can self-assess using this rubric.

For **SOURCES 1** and **2**, discuss the writer's view on the link between capitalism, social classes and the Protestant Reformation.

Step 1: Questioning and researching

Write your inquiry question. It can be on topics like:

a. Class conflict in pre-Modern Europe
b. Religious intolerance
c. Power in the hands of rulers and parliaments
d. Scientific progress

Research your question.

Step 2: Using historical sources

Examine your sources. Some might be biased, so separate facts from opinions.

Step 3: Historical perspectives and interpretations

Assess the importance of changes made.

Step 4: Communicate

Answer your inquiry question. Share your findings in any format. Support your answer with examples from research and analysis. Complete your self-assessment using the **Inquiry rubric** or the 2.7 exercise set online.

LESSON 2.8 Review

2.8.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

2.2 How do we know about the emergence of the modern world?

- Most Europeans were illiterate.
- The printing press allowed new ideas to spread among educated people.
- Printing helped more written sources survive.
- We must be aware of bias.
- Archaeological sources show evidence of trade, work, religion, war and daily life.

2.3 What caused economic and social change in the Early Modern Period?

- This was a time of transition from feudalism to capitalism.
- The Price Revolution brought wealth to some and poverty to others.
- Many social classes, like craftspeople and peasants, were unhappy.
- Rulers replaced knights with standing armies and mercenaries.

2.4 How did the Protestant Reformation bring about change?

- Religion greatly influenced people's thinking.
- Martin Luther began the Protestant Reformation in 1517.
- The Peasants' War was inspired by Luther but he rejected social revolt.
- Other forms of Protestantism and the Catholic Reformation also developed.

2.5 How did the power of rulers change in Early Modern Europe?

- Rulers were supported by townspeople.
- Rulers controlled their subjects' religion.
- The Thirty Years' War caused many deaths in Germany.
- Rulers in France, Spain and Russia gained more power.
- In England, Parliament became more powerful.

2.6 What were the achievements of the Scientific Revolution?

- Many famous scientists made important discoveries.
- It was dangerous to challenge Catholic Church beliefs.
- Some scientists were silenced or killed by the Church or Calvinists.
- The Scientific Revolution led to the Enlightenment.
- There are debates about changes during the Early Modern Period.
- One example is the link between capitalism and the Reformation.
- Historians also debate issues like religious intolerance, class conflict, political power and scientific progress.

2.7 Inquiry: What are the different interpretations of issues in pre Modern Europe?

- Historians have different views on pre-Modern Europe.

2.8.2 Key terms

artillery large mounted firearms like cannons
capitalism economic system where production and trade are privately owned
capitalist spirit way of thinking behind capitalism
chastity choosing not to have sexual relationships
clergy officials of the Church

commercial revolution a period of major economic change in Europe between the 11th and 18th centuries, where trade expanded, banking grew, and new business practices developed
craftsmen skilled workers who made goods by hand, such as blacksmiths, weavers, and shoemakers
day labourers worked for daily wages, often doing unskilled jobs on farms or in towns, without long-term employment
doctrine of Mahomet the Muslim faith, following Mohammed's teachings.
Early Modern Period the sixteenth and seventeenth centuries
excommunicated banned from Church membership
feudal aristocracy (nobles) the highest-ranking group in medieval society; powerful landowners who gained their status through birth and service to royalty
feudalism social order in medieval Europe
heresy opinion challenging the Roman Catholic Church
heretic person rejecting Church teachings
humanist belief centred on human interests or values
idolatry worship of idols
indulgence a way to reduce the amount of punishment one has to undergo for (forgiven) sins
inquisition Catholic body that tried people for heresy
knights warriors who followed a code of honour called chivalry; often served nobles or royalty for land or money
lords aristocratic landowners in feudal times
mercenary soldier fighting for money, not ideals
New World term for the Americas during the Early Modern Period
nobles rich and powerful landowners who held power over others through the feudal system
patricians wealthy and influential families in medieval towns or cities, often involved in politics and trade
peasants farmers who worked the land. Most were poor and either rented land or worked for landowners. Some were serfs, tied to the land.
Reformation Era period when Protestant churches emerged
Renaissance period of major changes in art, science and learning
robber barons feudal lords who used their castles to control trade routes and charged illegal tolls or robbed travellers
Scientific Revolution age of major scientific discoveries
townspeople those who lived in towns and cities, including merchants, craftsmen, and labourers. They were not part of the feudal system like peasants and nobles.
vassal person holding land for a lord, offering loyalty in return

2.8.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question:

How did societies change in the Early Modern Period? What key beliefs and values influenced them? What were people's perspectives? Which significant ideas have influenced the world today and how have historians interpreted the period?

1. Now that you've finished, what's your view? Discuss with a partner. Did this topic change your perspective? If so, how?
2. Write a paragraph summarising your answer to the inquiry question.

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Post-test	Online post-test
eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary
Video eLesson	The emergence of the modem world

2.8 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5, 11	3, 6, 7, 9, 12	4, 8, 10, 13, 14

REMEMBER AND UNDERSTAND

1. Identify the first European to create a printing press.
   A. Martin Luther
   B. Henry the Navigator
   C. Johannes Gutenberg
   D. Gustavus Adolphus
2. Which of these did Leonardo da Vinci designed.
   A. The computer
   B. The Colosseum
   C. The telephone
   D. A flying machine
3. Why did Henry VIII want to break from the Roman Catholic Church?
   A. The Pope wanted him to stop drinking ale.
   B. The Pope refused to let him divorce Catherine of Aragon.
   C. Henry disliked attending mass.
   D. Henry was an atheist.
4. The Peace of Augsburg gave German rulers the power to:
   A. keep fighting.
   B. decide their subjects' religion.
   C. levy more taxes.
   D. stop fighting.
5. Nicolaus Copernicus proved:
   A. that the Earth is round.
   B. that the Earth is the only planet.
   C. that the Sun circles the Earth.
   D. that the Earth is not the centre of the universe.
6. What caused the Price Revolution of the 1500s?
   A. Too much government spending
   B. Too many wars
   C. Economic depression
   D. Cheap silver and gold from the Americas
7. Martin Luther challenged the Catholic Church over:
   A. indulgences.
   B. prayers.
   C. robes.
   D. communion wine.
8. Rulers replaced feudal armies with:
   A. bows and arrows.
   B. machine guns.
   C. mercenaries and standing armies.
   D. ninjas.
9. The number of people who died in the Thirty Years' War was:
   A. between 4.5 million and 8 million.
   B. about 2 million.
   C. about 100 000.
   D. nearly a billion.

10. Rulers gained more power in the sixteenth and seventeenth centuries in:
    A. England and Germany.
    B. France and England.
    C. Russia and Spain.
    D. Spain and Germany.

ANALYSE AND APPLY

11. **List** three motives for the Thirty Years' War.
12. **Explain** why German peasants revolted in the early 1500s.
13. **Explain** how England became a republic in the 1600s.
14. **Explain** the consequences of Russia's Time of Troubles.

Answers and sample responses for this topic are available online.

3 Medieval Europe

LESSON SEQUENCE

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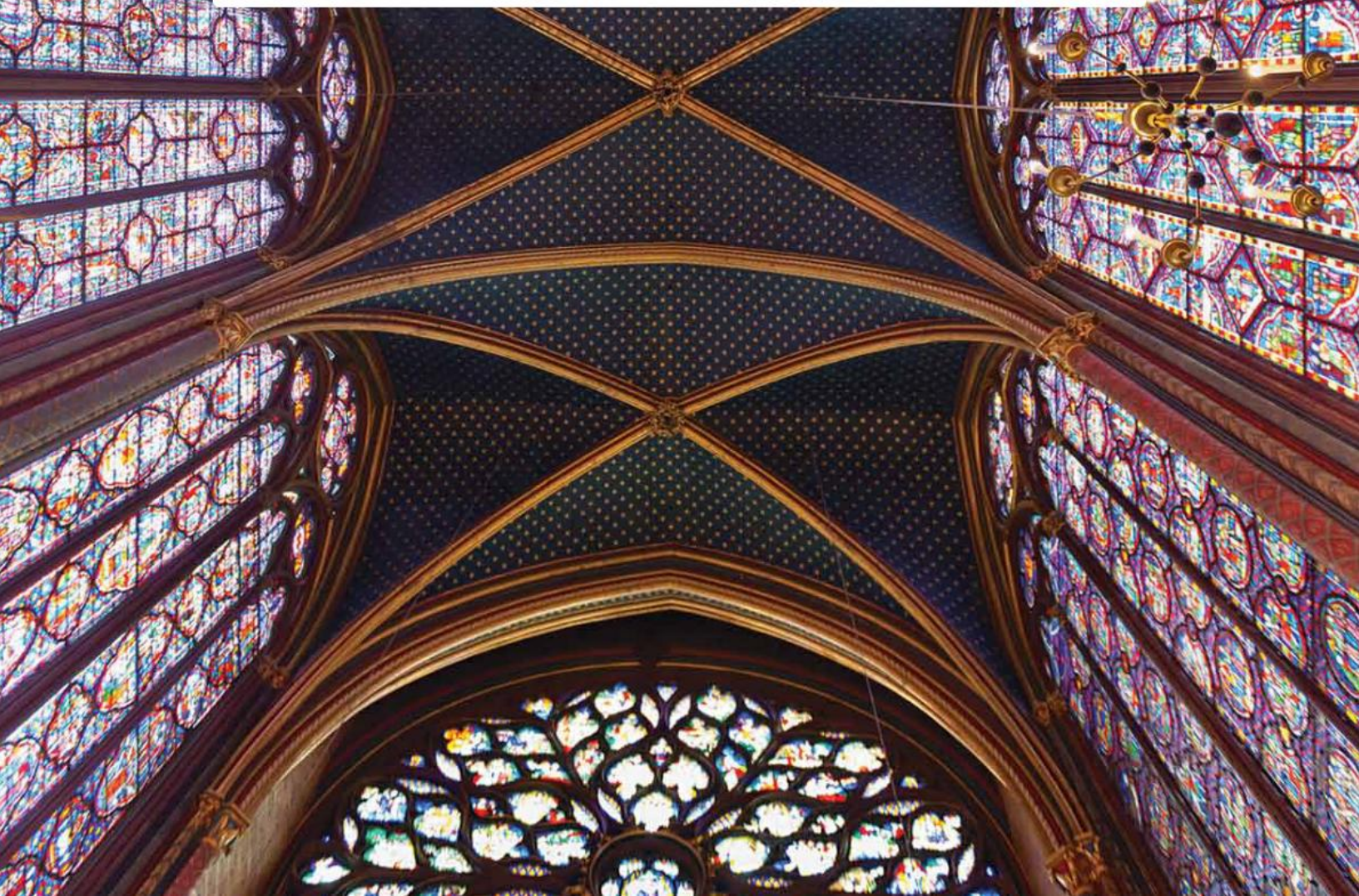


LESSON 3.1 Overview

INQUIRY QUESTION

What were the significant social, cultural, economic, environmental and political features of life in Medieval Europe?

Some traditions from the Middle Ages still exist today. For instance, Australia, colonised 300 years after the Middle Ages, still has a monarch whose role dates back to that time. Many Australians follow Christianity or Islam, both of which grew during the Middle Ages, and major conflicts involving these religions began then. European countries as we now know them, started to form during this period, and the English language developed significantly. We may no longer have castles or knights, but many traditions, events and nations have their roots in the Middle Ages.

learnon

- **Pre-test**
  Online pre-test
- **eWorkbook**
  Customisable worksheets for this topic
- **Digital document**
  Key terms glossary
- **Video eLesson**
  Medieval Europe

800
The feudal system begins in the Frankish Empire under Charlemagne.

966
Poland adopts Christianity.

1000
Hungary adopts Christianity.

1099
Crusaders conquer Jerusalem.

CE 700 750 800 850 900 950 1000 1050 1100

Late ninth century
First version of *Anglo-Saxon Chronicle* is written.

965
Denmark adopts Christianity.

988
Kiev Rus adopts Christianity.

1095
Pope Urban II launches the First Crusade.

SkillBuilder

Use the SkillBuilder activities to develop these Historical concepts and skills:

- HISTORICAL QUESTIONS
- CHRONOLOGY
- USING HISTORICAL SOURCES
- CONTINUITY AND CHANGE
- CAUSES AND CONSEQUENCES
- HISTORICAL SIGNIFICANCE
- COMMUNICATING

1147 Second Crusade begins.

1187 Turks reconquer Jerusalem.

1189 Third Crusade begins.

1202 Fourth Crusade begins.

1347 The Black Death begins in Europe.

1381 The Peasants' Revolt in England.

1391 Geoffrey Chaucer writes *The Canterbury Tales*.

1453 Constantinople falls to the Turks.

1150 — 1200 — 1250 — 1300 — 1350 — 1400 — 1450 — 1500 — CE

LESSON 3.2 How do we know about medieval Europe?

LEARNING INTENTION

By the end of this lesson you should be able to **identify** the types of evidence that historians use to draw conclusions about medieval Europe.

Tune in

Illuminations such as **SOURCE 1** help us imagine what life was like during the Middle Ages. In the foreground, peasants can be seen engaged in various activities on a farm.

Many illuminations show scenes of village life, with peasants tending their crops and livestock. For the illustrator, such a scene would have been commonplace, because 90 per cent or more of the medieval population were peasants.

SOURCE 1 Peasants working in the fields, from a French calendar illumination by the Limbourg Brothers, c. 1415

1. **Brainstorm five conclusions you could draw about French medieval life from SOURCE 1.**
2. **As a group, decide whether you would consider this a trustworthy or reliable source.**

3.2.1 How do we know about medieval Europe?

There are many different types of evidence that provide historians with information. These include artwork, written sources and artefacts, monuments and buildings.

3.2.2 Artwork

Besides illuminations, embroidered tapestries are also valuable to historians. The Bayeux Tapestry (see **SOURCE 2**) is an embroidered cloth showing the Battle of Hastings in 1066 and the events before it. It is very well preserved and is displayed in Bayeux, France. Although its origins are unclear, such wall hangings were used for decoration and to insulate cold castle walls. They were also portable and moved with their owners. These artworks provide historians with much information about the scenes they show and the technologies available to their creators. Other artworks include paintings, mosaics and frescos.

SOURCE 2 A section of the Bayeux Tapestry that shows the preparation of the feast while on campaign fighting for King William I of England

SkillBuilder discussion

Using historical sources

1. Look at **SOURCE 2**. What details in the tapestry suggest the social status and roles of the servants depicted?
2. How does the tapestry illustrate the daily life and activities of servants during a military campaign?
3. What can we learn about the food, clothing and customs of the time from this section of the tapestry?

3.2.3 Written sources

Many stories and poems from the Middle Ages give us valuable information. One famous example is Geoffrey Chaucer's *The Canterbury Tales*, written around 1391. This book looks at medieval English society. The titles of the tales, like 'The Miller's Tale', 'The Knight's Tale' and 'The Monk's Tale', show the different jobs people had.

Official records also provide information about the Middle Ages. For instance, William the Conqueror (William I) conducted a survey of all property in England in the late 11th century. This record, called *The Domesday Book* (see **SOURCE 3**), details the resources in England at that time, and is very useful for historians.

DID YOU KNOW?

The term 'Dark Ages' was originally used by the Italian scholar Petrarch in the 1330s. He was describing what he considered to be the poor quality of literature coming from Europe in the period following the fall of Rome.

SOURCE 3 *The Domesday Book* is an amazing eleventh-century public record of who owned what and how much they had. After conquering the English, the new king, William I, ordered a public survey of his new territory, and the record was written up to become *The Domesday Book*.

3.2.4 Artefacts, monuments and buildings

Artefacts, monuments and buildings from the Middle Ages are valuable sources of information. Artefacts include items like coins, armour, weapons, utensils, tools and goblets. Durable metals like silver, gold and bronze are more common than garments or materials like timber and iron, which tend to rust or rot. Historians use written and pictorial records to understand what these materials looked like.

Many buildings from the Middle Ages still exist, such as cottages, churches, monasteries, tithe barns, castles and manor houses. The cottage in **SOURCE 4**, made of **thatch** and stone, is a good example of a fourteenth-century peasant's home, though it would have needed frequent renovations. In contrast, **SOURCE 5**, Dover Castle, was built for much wealthier and more powerful people. Its history dates back to pre-Roman times, but its current form began under King Henry II in the late twelfth century.

Castles like Dover help historians understand their use as military fortresses and homes for the rich. Comparing cottages and castles shows the class differences between peasants and their rulers. Even ruins can provide clues about life in the Middle Ages.

SOURCE 4 These reconstructed cottages date back to the fourteenth century.

SOURCE 5 Dover castle in Kent, England, was built in the eleventh and twelfth centuries.

SkillBuilder discussion

Using historical sources

1. Look at **SOURCE 5**. What architectural features of Dover Castle indicate its use as a military fortress?
2. How does the design of Dover Castle reflect the social status and lifestyle of its inhabitants?
3. What can the location and structure of Dover Castle tell us about the historical significance of its site?

3.2.5 First-hand accounts of the Black Death

The Black Death was a devastating event that affected many countries. By using primary and secondary sources, we can learn how this plague impacted people at the time. Monasteries in Europe recorded events in chronicles. Writers like Ibn Khaldun in the Middle East and the monk Henry Knighton in England wrote about the plague's effects in their countries. In Italy, Agnolo di Tura detailed how the plague affected the people of Siena (see **SOURCE 7**).

Medieval church parishes kept records of baptisms, marriages and deaths. Although the Black Death caused many deaths, making it hard for priests or monks to keep records up-to-date, some accurate details still survive. It takes effort to piece all these elements together.

The leasing of land to the church for emergency graveyards shows how suddenly and violently the plague struck. The medieval world was shocked by the plague and was not ready to handle it.

SOURCE 6 Boccaccio's *Decameron* was written between 1349 and 1351 and contains descriptions of the effects of the Black Death on the population of the Italian city of Florence. Illustrations were an important part of every medieval book.

SOURCE 7 From Agnolo di Tura's *Description of the Black Death*, 1348

The victims died almost immediately. They would swell beneath the armpits and in the groin and fall over while talking. None could be found to bury the dead for money or friendship. Members of a household brought their dead to a ditch as best they could, without priest, without divine offices. In many places in Siena great pits were dug and piled deep with the multitude of dead. And they died by the hundreds, both day and night, and all were thrown in those ditches and covered with earth. And as soon as those ditches were filled, more were dug.

Contemporary artists

Just as writers were keen to record the events happening around them, artists produced drawings and paintings showing many aspects of the Black Death. As well as illustrating the symptoms of the disease in their artworks, artists were inspired to explore themes of death and destruction. Burials, skeletons and personifications of death featured prominently, such as in **SOURCE 8**.

SkillBuilder discussion

Using historical sources

1. What details in the manuscript illustrate the burial practices for plague victims during this period?
2. How does the artwork reflect the cultural and religious attitudes towards death and disease in thirteenth-century Persia?
3. What can we learn about the impact of the plague on Persian society from the depiction in this manuscript?

SOURCE 8 The burial of a man who died of plague from a thirteenth-century Persian illuminated manuscript

3.2 SkillBuilder activity **USING HISTORICAL SOURCES**

1. Make a list of types of sources shown in this lesson under the headings 'Artwork', 'Written sources' and 'Artefacts, monuments and buildings'.
2. Write an explanation paragraph about what you can learn from each one, and provide an example.
3. **Share** these in your class and add to a class document that you can display in your history classroom.

3.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 6	5, 7, 8, 11, 12	4, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** the different types of artwork that historians have access to in order to draw conclusions about the medieval era. Select all that apply.
   - A. Illuminations
   - B. Photographs
   - C. Tapestries
   - D. Films
   - E. Buildings
   - F. Paintings
   - G. Frescoes
   - H. Letters
   - I. Mosaics
2. **Determine** if the following statements are True or False.
   - a. Illuminations were mostly concerned with scenes of aristocracy and court life.
   - b. Medieval church parishes kept no written records.
   - c. The **SOURCE 3** photograph of *The Domesday Book* is a secondary source.
   - d. Embroidered tapestries are not valuable to historians as they were only used to insulate castle walls.

3. **Consider SOURCE 2**.
   The Bayeux Tapestry was created to celebrate _____.
   The purpose of such a wall hanging was for decoration and _____.
4. **Explain** the importance of written sources from this period to historians.
5. **Identify** the types of artefact that were most likely to survive from this period.
   A. Items made of cloth
   B. Items made of timber
   C. Items made of silver, gold or bronze
   D. Items made of iron
6. **Describe** the illustration in **SOURCE 8** and explain the reactions of the subjects.

ANALYSE AND APPLY

7. Refer to **SOURCE 2**. **Identify** the questions you would need to ask to work out what its biases are.
8. **Analyse** how **SOURCES 1**, **4** and **5** help us learn about what life in medieval Europe was like.
9. **Explain** what a historian would be likely to learn about the medieval period from *The Canterbury Tales*.
10. **Examine** the reasons why William the Conqueror conducted a public survey of his new kingdom and **create** a written account of it (*The Domesday Book*).
11. Although Boccaccio's *Decameron* (see **SOURCE 6**) is a work of fiction, it can still provide useful historical information. **Discuss** how works of fiction can help us to find out about the past.
12. Read **SOURCE 7**. **Describe** what this source reveals about the symptoms of the plague.

Answers and sample responses for this topic are available online.

LESSON 3.3 What are the key features of the feudal system?

LEARNING INTENTION

By the end of this lesson, you should be able to **describe** the hierarchical structure and way of life of European medieval feudal society.

Tune in

Charlemagne (Charles the Great) was King of the **Franks** and eventually the Holy Roman Emperor, having united Europe under his rule. Through a variety of military campaigns and powerful negotiations, he established peace and order in most of Europe.

1. **Look closely at the statue of Charlemagne in SOURCE 1 and identify the traditional symbols of power that you can see. Discuss what they might represent.**
2. **With the person sitting beside you, decide what personal qualities you think a strong monarch would have needed in this era. Share these with the class and see if you agree.**

SOURCE 1 A statue of Charlemagne that stands in Paris

3.3.1 Order out of chaos

Charlemagne was King of the Franks from 768 to 814 CE. He was a powerful leader who conquered many lands. His empire grew larger than the old Roman Empire and, in 800 CE, the Pope crowned him ruler of the Holy Roman Empire. Charlemagne brought peace and productivity to his chaotic empire by implementing a strong feudal system.

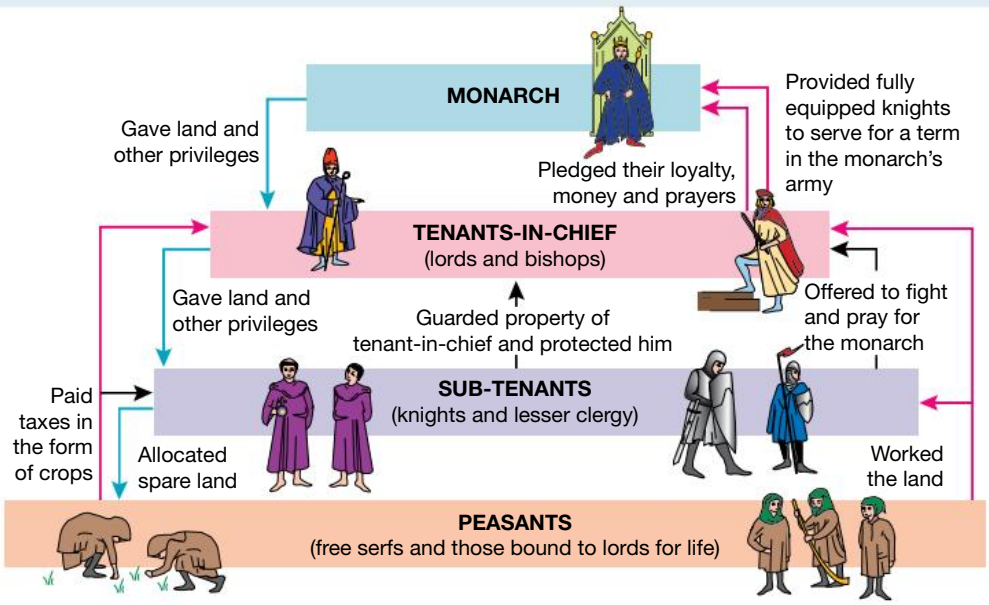
In 800 CE, Charlemagne gave land to churchmen and wealthy families in exchange for their support in running the empire. This system is called feudalism. Although based on older practices, Charlemagne's time provides strong evidence of a clear feudal system in Europe. It took hundreds of years for feudalism to spread. Some European countries never adopted it, and some Asian societies, like Japan, developed their own versions of feudalism.

3.3.2 The feudal kingdom

In early medieval Europe, there were few cities or towns. Most communities were small villages. Most villagers were peasants — poor farmers who worked the land. Peasants made up about 90 per cent of the population and generated most of the wealth.

Under **feudalism**, the monarch (king or queen) owned all the land. The next most powerful were the feudal **lords**, nobles who owned large areas of land. In exchange for land and control over peasants, these nobles (or tenants-in-chief) had to be loyal to the monarch, fight in wars, and give the monarch part of the taxes collected from peasants. Below the nobles were the knights (or sub-tenants). They received land in return for loyalty, fighting for their lord, and providing taxes they took from their peasants.

SOURCE 2 How society in Europe was organised under the feudal system



SkillBuilder discussion

Using historical sources

1. Study **SOURCE 2.** How does the image show the roles and responsibilities of each class in the feudal system?
2. What visual elements in the image highlight the power dynamics and relationships between the different social classes?
3. How does the feudal hierarchy help us understand the economic and social structure of medieval European society?

The monarch also gave land to the **clergy**. In western European countries such as England, the clergy swore loyalty to the Pope in Rome rather than to their monarch. However, they also supported the feudal system by accepting the monarch and the lord as God's earthly representatives. Well-educated clerical advisers were often assigned to the monarch's service and helped keep social order.

Maintaining the social order

Feudalism helped monarchs control their nobles and lords. If the lords broke their oath, the monarch could take back their lands and remove their power. Everyone had control over those below them, down to the peasants at the bottom.

Towards the end of the Middle Ages, trade-based towns and cities grew. Rich merchants could defy or ignore the monarch and the lords, and could even hire their own knights. This led to the decline of feudalism. *The Domesday Book*, ordered by William the Conqueror around 1085, recorded who owned what land and how much tax was owed. This helped him maintain control over the society, but it also now gives us a clear picture of how medieval manors functioned.

3.3 SkillBuilder activity USING HISTORICAL SOURCES

Read the **SOURCE 3** extract from *The Domesday Book* closely and complete the following.

a. **Identify** the tenant-in-chief of this village.
b. **Identify** how many families of villagers are indicated (each number represents a family, rather than a single person).
c. **Identify** how much land Hitchen has.
d. **Determine** what resources this village has.
e. **Assess** whether or not this was a thriving village.

SOURCE 3 This extract from *The Domesday Book* gives information about a reasonably large village called Hitchen in County Hertfordshire.

Source Taxable units: Taxable value 5 **geld** units.

Value: Value to lord in 1066 £4.

Value to lord in 1086 £6.

Value to lord c. 1070 £1.

Households: 45 villagers. 17 smallholders. 12 slaves. 29 cottagers.

Ploughland: 38 ploughlands (land for). 7 lord's plough teams. 1 lord's plough teams possible.

22 men's plough teams.

Other resources: 2.5 lord's lands. Meadow 4.25 ploughs. Woodland 600 pigs. 4 mills, value 2.66.

1 church.

Lords in 1066: Earl Harold; Hitchin, church of.

Lords in 1086: Hitchin, church of; King William.

Tenant-in-chief in 1086: King William.

3.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4, 6, 9	7, 8, 10

REMEMBER AND UNDERSTAND

1. **Identify** the two features of Charlemagne's rule that led to him being one of the most significant figures in medieval Europe.
   A. His empire grew larger than the old Roman Empire.
   B. He took land from wealthy families and gave it to the poor.
   C. He implemented the feudal system.
   D. He gave people the option to convert to Christianity.
2. **Identify** who was the ruler and owner of the land under feudalism.
   A. The monarch
   B. Tenants-in-chief
   C. Sub-tenants
   D. Peasants
3. **Identify** the tenants-in-chief under feudalism.
4. Apart from the monarch, **identify** who the clergy swore loyalty to.
5. **Identify** how the lords maintained control over the people below them.
   A. By punishing them with physical torture
   B. By taking back land and removing their source of power
   C. By giving them a fine
   D. By having a stern word with them

ANALYSE AND APPLY

6. **Explain** how *The Domesday Book* gave William the Conqueror power.
7. Using the information in **SOURCE 1** and **SOURCE 2**, **compare** and **contrast** how the symbols of power are used to show the strength of the monarch or tenant-in-chief, and what those symbols represent.
8. Using the information in **SOURCE 2**, explain the organisation of feudal society.
9. **Identify** who benefited from the feudal system and who did not. **Explain** your choices.

EVALUATE AND COMMUNICATE

10. Using the diagram in **SOURCE 2** and your broader knowledge, **propose** three essential elements of a feudal society. These may be physical constructions, social classifications or ways of thinking.

Answers and sample responses for this topic are available online.

LESSON 3.4 How was life for people in the feudal system?

LEARNING INTENTION

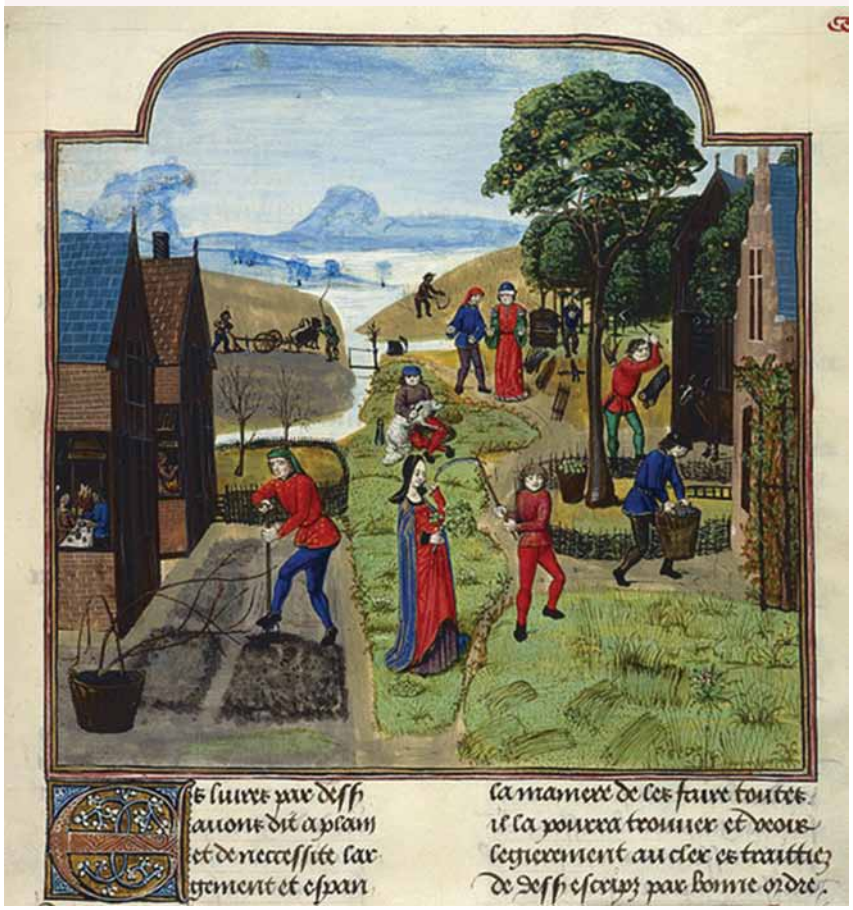
By the end of this lesson you should be able to:

- **distinguish** between the roles of medieval men and women in different social classes
- **explain** how the life of a child in medieval society differs from your own.

Tune in

As can be seen in this **SOURCE 1** image from fifteenth-century France, peasants worked the fields and paid most of their produce to their lords as tithes (a type of tax).

SOURCE 1 An image depicting peasants working in the fields in the fifteenth century



Closely examine the image.

1. **See: What can you see the people in the illumination doing?**
2. **Think: What does it make you think in terms of what you have already learnt about the feudal system?**
3. **Wonder: Share the questions that it raises for you about life on the manor in medieval times. Keep a list of these to see if they are answered as you work through this lesson.**

3.4.1 The people on the manor

Quality of life in the Middle Ages depended on a person's position in the feudal system. Nobles, with their wealth and servants, lived more comfortably than peasants. Knights and barons had privileges, like owning several manors and living off taxes from peasants. The clergy led simple lives, giving up possessions to serve God. As the educated elite, they enjoyed learning in their monasteries. Although clergy often did farm work like peasants, many monasteries operated like manors and owned villages.

Women

Medieval women, regardless of class, had few rights. Noble women married as early as age 12, with marriages arranged by their families to gain political power or wealth. Society expected them to produce a male heir. Childbirth was dangerous and about one in five women died during childbirth. Noble women managed their husband's household and had some control over servants but could not own property, except as widows.

SkillBuilder discussion

Using historical sources

1. Look carefully at **SOURCE 2**. What specific tasks are the peasant women performing?
2. How does the image depict the daily life and working conditions of peasant women in the Middle Ages?
3. What can we learn about the social and economic roles of peasant women from this image?

SOURCE 2 Much of the farm work was carried out by peasant women.

Peasant women had even fewer rights. Peasant families generally were reluctant to allow their female members to marry as young as the noble women. This was because children were an important source of labour. Peasant women did much the same farm labour as the men. On top of that, they had household duties such as preparing food and weaving clothes, and looking after the children and small livestock.

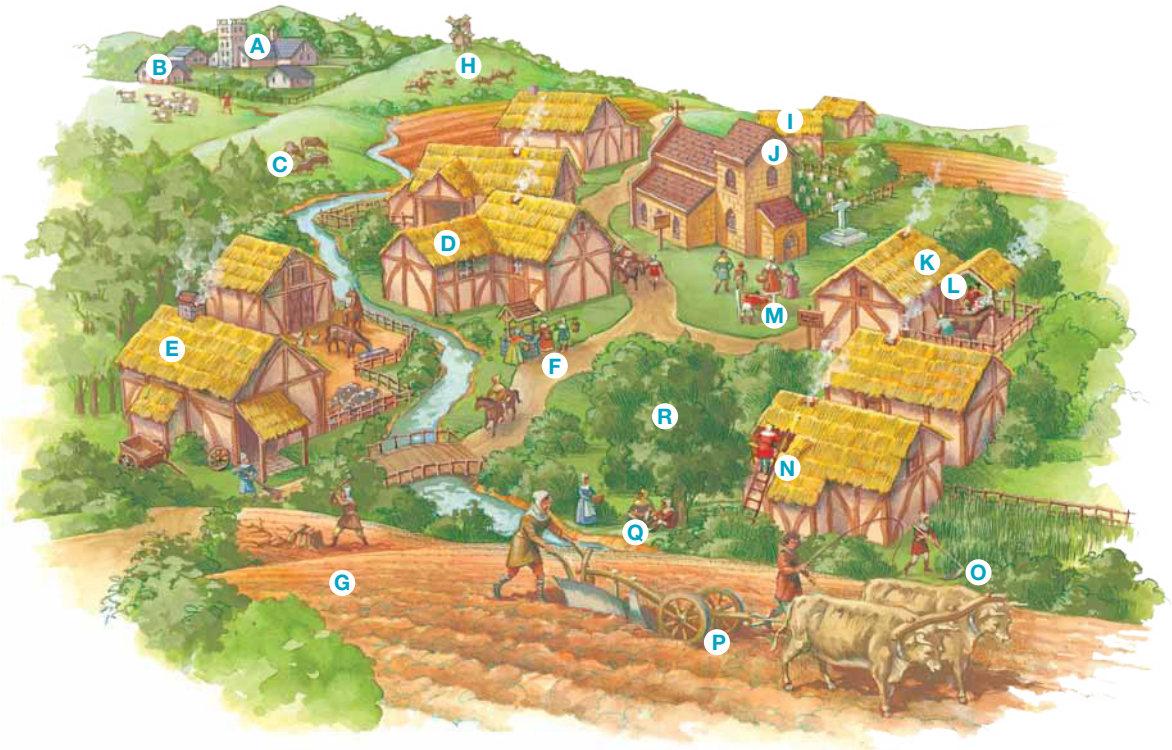
Men

For most peasant men, life was very hard. They endured a daily grind of farm work: clearing fields, harvesting, repairing buildings, sawing and chopping timber, and paying the tithe to the lord of the manor. Most men were uneducated and remained tied to the drudgery of peasant labour. Still, some boys managed to receive formal education in monasteries. This might provide them with the opportunity to become a parish priest or to work on the manor in a bookkeeping role such as a bailiff or a steward.

Children

Childhood as a time of play or schooling was almost non-existent. Children were regarded as sources of labour on the farm. At first they would help the women with household chores, but eventually were sent out to work on the fields. Peasant children were educated in how to harvest a field, fix a thatched roof or milk a cow.

SOURCE 3 Life on a manor in the Middle Ages



A Lords often owned and operated grain mills. They kept a portion of all grain ground as tax. The lord lived in a castle or a manor house. The woods, and any game they contained, were the lord's property.

B The house of the steward — the lord's business manager — was surrounded by stables, barns, a bake house and a kitchen.

C Animals grazed on an open stretch of land called a common.

D The bailiff, who collected taxes and ensured the steward's directions were carried out, had a house on the manor.

E The **reeve**, who supervised farm work carried out by serfs to ensure it was done properly, also had a house on the manor.

F Women were the property of their father and then husband, and were married by about 14. They cooked, spun and weaved, and tended to the animals and the children.

G The three-field rotation system was introduced by the Anglo-Saxons. Crops were grown in two fields, with the third left to lie **fallow** (not used) so the soil could recover its nutrients. Fields being used were divided into strips, with different serfs working each strip. Crops were rotated to prevent the same nutrients in the soil always being used.

H The miller operated the mill, where grain such as wheat was ground into flour.

I At the tithe barn, the peasants deposited one-tenth of all they produced for use by the church.

J The church (and its grounds) was a central feature. People went to church regularly. It was also the place where they paid their tithes and often held their simple markets. The tithe was a tax given to the church equal to one-tenth of what someone received, grew or raised.

K Serfs lived in simple wattle and daub huts with thatched roofs. A hole in the roof allowed smoke to escape from cooking fires. Windows had rough wooden shutters.

L As well as farming, some serfs also worked as blacksmiths and carpenters. They generally could not read or write.

M A serf who had been punished by the reeve was placed in the pillory. This punishment instrument consisted of a wooden framework built on posts, with holes through which the victim's head and hands were placed and then locked.

N Thatchers wove thick bunches of straw, reeds and sticks together to form roofs of village houses.

O Scythes, sickles and rakes were used to harvest crops.

P A serf's most important tool was the heavy-wheeled plough.

Q Lunch for a serf might be coarse bread and vegetable soup, washed down with ale.

R Although some trees had been cleared for farmland many generations ago, the medieval manor still had many treed areas which offered shade and protection for wildlife.

It appears that in medieval Europe, the period of human growth now called adolescence was ignored. Children were treated as adults from the age of 10 because by then they could participate in the farm work, and usually married when they were about 14 years old.

3.4 SkillBuilder activity USING HISTORICAL SOURCES

SOURCE 1 is a primary source and **SOURCE 3** is a secondary source.

1. As a class, **discuss** the value of each of these sources, as well as their limitations. Be specific about the content of each source.
2. If you were only allowed to use one source to explain this lesson to someone else, **decide** which one you would use. **Explain** your reasons in detail and share with the class.

3.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 6	4, 7, 9	5, 8, 10

REMEMBER AND UNDERSTAND

1. **Identify** the type of work peasant men generally did.
   A. Preparing food
   B. Farm work
   C. Being a parish priest
   D. Weaving clothes
2. **Determine** if the following statements are True or False.
   a. It was impossible for peasant men to manage to get an education.
   b. Children were treated as adults from the age of 12.
3. **Explain** why noble women's marriages were arranged for them by their family.
   A. This was the tradition during the Middle Ages.
   B. It was to gain political power or wealth for the girl's family.
   C. It was a mandatory rule enforced by the monarch.
   D. Arranged marriages were the only form of marriage in the Middle Ages.
4. **Explain** what property rights a noble woman had compared with her husband.
5. **Propose** why it might have been highly valued to have a large family in medieval Europe.

ANALYSE AND APPLY

6. **Explain** which social class most people in medieval Europe belonged to.
7. **Consider SOURCE 1** and **SOURCE 3**.
   a. **Construct** a list of the work you can see people doing in **SOURCE 1** and **SOURCE 3**.
   b. From the jobs you listed in Question 7a, **identify** which jobs women and children were able to do.
8. **Determine** who held the most wealth and power on the manor in **SOURCES 1** and **3**. **Identify** the basis of their wealth.
9. **Examine** the picture of life on a manor in **SOURCE 3**.
   a. **Explain** the roles of the reeve, steward and bailiff.
   b. **Construct** a diagram that shows the bailiff, steward and reeve in order of importance.
   c. **Explain** whether women would have been allowed to do the jobs of steward, bailiff and reeve in medieval times. **Justify** your answer.
10. Using the information gained from **SOURCE 1** and **SOURCE 3** from this lesson, as well as any other knowledge you have, **construct** a paragraph about life on the manor, **describing** work, living conditions and farming practices in medieval Europe.

Answers and sample responses for this topic are available online.

LESSON 3.5 What were the defence features of the medieval castle?

LEARNING INTENTION

By the end of this lesson you should be able to:

- describe the features of castles and how they protected society

Tune in

Castles were not just homes to those at the very top of feudal society, but fortresses designed to protect those inside the castle walls.

Study **SOURCE 1**.

1. **Create a list of all the features that are protecting the castle.**
2. **Discuss how these features protect the castle.**
3. **Predict why fortresses became outdated.**

SOURCE 1 Ruin of a medieval Scottish castle fort

3.5.1 Building a castle

During medieval times, castles were built to protect the monarch's or lord's land. They had features like high walls that made it hard for enemies to invade. If conquered, castles could be used by invaders to control the land. Castle walls were so effective that they were even built around some towns and cities.

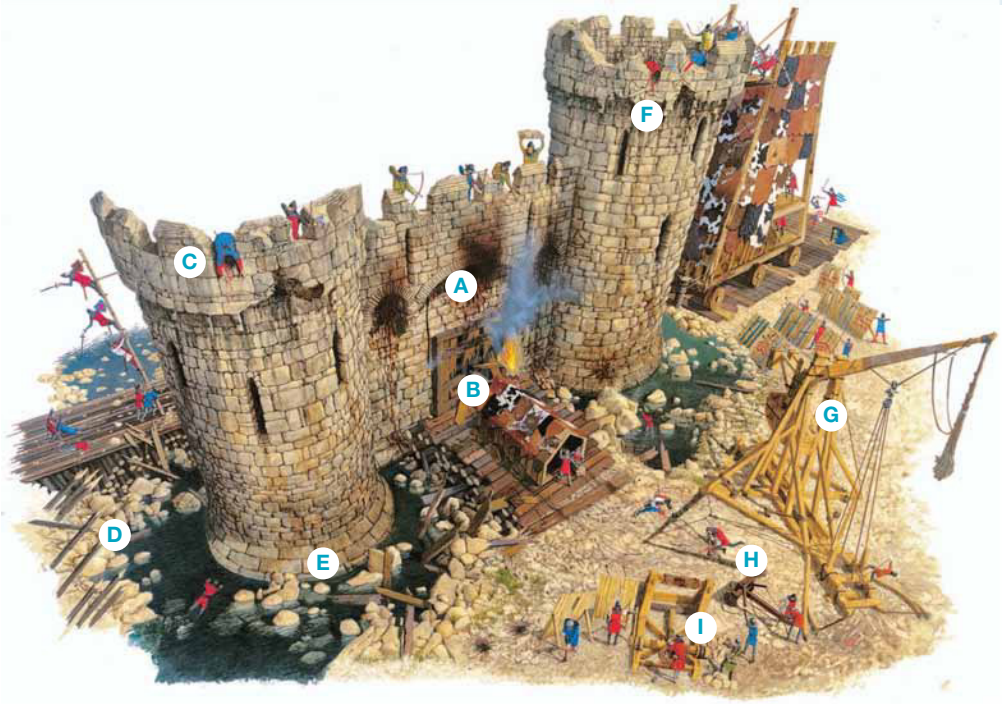
The first castles appeared in the 11th century, usually made from timber and built on a high mound called a **motte**, surrounded by a ditch. If near a river, the ditch could be filled with water to create a **moat**. The innermost tower was called the **keep**, protected by **palisades** and walls called baileys. By the end of the 11th century, timber was replaced with stone or brick.

The easiest place to build a castle was on flat ground, but they were often built on hills or cliffs for better defense and control over the surrounding area. A high position made it easier to spot and defend against attackers. Castles on islands in rivers or lakes had advantages too, like forcing merchants to pay taxes and ensuring a water supply during sieges.

3.5.2 Attacking a castle

Attacking a castle was a formidable challenge. As castle designs evolved, they incorporated more defensive features. **Concentric curtain** walls, like those at Marienburg Castle in Poland, forced attackers to breach multiple layers. Drawbridges could be raised to block access, and defenders launched arrows, rocks, and boiling oil from the walls. Attackers used siege engines like battering rams and siege towers. Sieges often lasted months, with defenders relying on stored food and protected water supplies from wells in the inner courtyard.

SOURCE 2 A castle under siege



SkillBuilder discussion

Historical significance

1. Study **SOURCE 2**. What defensive features of the castle are visible in the image, and how are they being used to repel the attackers?
2. What methods and equipment are the attackers using to try to breach the castle's defenses?
3. How do the people inside the castle appear to be responding to the siege?

A The gatehouse was heavily defended. If attackers got in, defenders could shower them with rocks, red-hot sand or boiling water through a hole in the ceiling (called a murder hole).

B A battering ram made of a huge, often reinforced timber beam would be driven against a castle gate or lower wall to try to break through.

C Battlements lined the top of castle walls.

D A castle was often surrounded by a ditch, sometimes filled with sharpened stakes (palisade) or water.

E Sometimes castle walls sloped outwards at the base. This added strength to the walls and reduced the effectiveness of battering rams.

F Missiles could be dropped on attackers through holes in the floor of the battlements known as machicolations.

G The trebuchet, introduced to Europe from the Arab world, was a type of counterweighted catapult. It was used to hurl huge rocks weighing up to 90 kg against castle walls, and to toss rotting animal bodies over the walls.

H The ballista was a giant crossbow that fired flaming bolts over castle walls.

I A mangonel was a type of catapult used to hurl smaller objects (e.g. heads, smaller rocks or piles of dung) over castle walls.

DID YOU KNOW?

Crenellations are the battlements on the top of castle walls or towers. Primarily built for defensive purposes, they allow for cover while still giving the space to return fire or pour boiling oil on the enemy. A 'licence to crenellate' was supposedly a grant that gave official permission for a building to be fortified and was used by the monarch and barons who could grant them as a symbol of status and power.

3.5.3 A lord's home is his castle

A castle was a fortress and a home. It was usually owned by a lord or the Church. It had troop quarters, stables and an armoury. If owned by a lord, it also had comfortable facilities for his family.

By the end of the Middle Ages, castles were less effective and desirable. The feudal system, which encouraged lords to show strength with a castle, was fading. Cannons had developed, making castle walls less protective against armies.

3.5 SkillBuilder activity USING HISTORICAL SOURCES, COMMUNICATING

1. **Recreate** what Corfe Castle (**SOURCE 3**) may have looked like. Use the ruins in the photograph to reconstruct it visually. Include the keep, the palisade, the motte and the bailey, and label them.
2. **Use** the internet to **investigate** Corfe Castle in Dorset, England.

Find photographs with further detail and add to your diagram.

You might also find an artist's representation of what the original castle looked like to check against your diagram. How close were you?

SOURCE 3 The ruins of Corfe Castle, in Dorset, England. The square tower is a Norman keep. The destruction was the result of cannon fire during the English Civil War in the mid-seventeenth century.

3.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5, 9	3, 4, 7	6, 8, 10

REMEMBER AND UNDERSTAND

1. The first castles appeared in the _____ century. The innermost tower was called a _____. The bailey was a _____.
2. Early castles were built from:
   A. timber
   B. bricks
   C. stones
   D. concrete.
3. **Identify** two reasons why castles in medieval Europe were often built on a steep hill.
4. **Explain** what a murder hole was used for.
5. **Identify** two reasons why castles were built.
   A. To be a fortress for military use
   B. To be used as a church
   C. To be used as a home
   D. To be used as a school
   E. To provide employment
   F. To be used as a palace

ANALYSE AND APPLY

6. **Determine** how the castle was a symbol of the feudal system.
7. **Examine SOURCE 2**.
   Explain which features of the castle and its defenders would be most effective in holding back the attack.
   Explain which methods of attack appear to be most effective. **Justify** your answers.
8. **Explain** how likely it is that the attackers in **SOURCE 2** will succeed in breaking into the castle. Provide two reasons to **justify** your response.
9. **Explain** the common methods used to attack and defend castles.

EVALUATE AND COMMUNICATE

10. **Deduce** what are the best places to build a castle and **explain** why.

Answers and sample responses for this topic are available online.

LESSON 3.6 How was warfare conducted in the Middle Ages?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the role of the knight in medieval warfare, as well as identify the weapons and the strategies used in battle.

Tune in

One of the most iconic images of the Middle Ages is that of the mounted warrior called the knight.

SOURCE 1 depicts Norman knights on horseback attacking their English enemies at the Battle of Hastings in 1066.

1. **Describe what is happening in SOURCE 1.**
2. **Explain how this source would help historians find out about the weapons and armour of medieval knights of the eleventh century.**
3. **Discuss why you think the knight is an iconic image of medieval times, even today.**

SOURCE 1 A scene from the Bayeux Tapestry, dating from the late eleventh century

3.6.1 The warrior on horseback

Knights as we know them appeared in the Middle Ages. Two key developments made it possible for soldiers to fight on horseback: the **stirrup** and a heavier breed of horse that could carry a man in full armour. These emerged in the Early Middle Ages. The Battle of Hastings in 1066, between Norman knights and English infantry, is one of the earliest battles involving knights on horseback.

Knights at Hastings fought for their lord, William, **Duke of Normandy**. This feudal service to a lord or monarch was a key part of knighthood. Knights were usually wealthy because it was expensive to breed warhorses and own good armour. They were also powerful landowners.

3.6.2 The knight in battle

As **SOURCE 1** shows, a heavily armed warrior on horseback was meant to terrorise and destroy foot soldiers. The decapitated body at the bottom of the panel demonstrates the effectiveness of a charging knight.

The knight used an arsenal of heavy iron weapons. Swords, **maces** and battle axes were common. However, the **lance** appears to have been the favoured weapon: it helped to put distance between the knight and the infantry soldier he was fighting. As a last resort, the knight's wooden shield could be used as a weapon — swiping at someone with its rim could cause severe wounds.

The armour was both heavy and awkward. The coats of mail worn by the fighters in **SOURCE 5** could weigh more than 15 kilograms. It was no easy task to wear such a cumbersome outfit on horseback and fight furiously in battle.

SOURCE 2 The trebuchet was a kind of giant slingshot designed for hurling rocks at enemy armies and fortresses. Sometimes other missiles were used, including dead animals and slain enemies, with the twin aims of demoralising the enemy and spreading disease among the besieged population.

3.6.3 Medieval warfare

Medieval warfare was vastly different from modern warfare. Battles were fought with swords, axes, maces and arrows. The invention of gunpowder in the 14th century introduced guns and cannons, though early firearms were unreliable. Archers with longbows and crossbows remained crucial until gun technology improved by the late 15th century.

Medieval battles were chaotic and brutal, with hand-to-hand combat and tightly grouped formations. The noise of battle was intense up close but quieter from a distance compared to modern **artillery**. Knights on horseback charged to disrupt infantry formations, leading to horrific bloodshed. Battles were short but deadly, leaving fields strewn with bodies.

There were no war cemeteries or pensions for soldiers. Disabled veterans often had to beg to survive, highlighting the harsh realities of medieval warfare.

SkillBuilder discussion

Using historical sources

1. What was the primary purpose of the trebuchet in medieval warfare?
2. Besides rocks, what other types of missiles were used with the trebuchet?
3. How did using dead animals and slain enemies as missiles affect the besieged population?

SOURCE 3 From a chronicle describing the Battle of Bannockburn in 1314, when the Scottish rebel leader Robert the Bruce defeated the English, who sought to control Scotland. Robert became King Robert I of Scotland.

The two hosts (English and Scottish armies) came together, and the great steeds of the (English) knights dashed into the Scottish **pikes** as into a thick wood; there arose a great and horrible crash from rending [splitting] lances and dying horses, and they stood locked together.

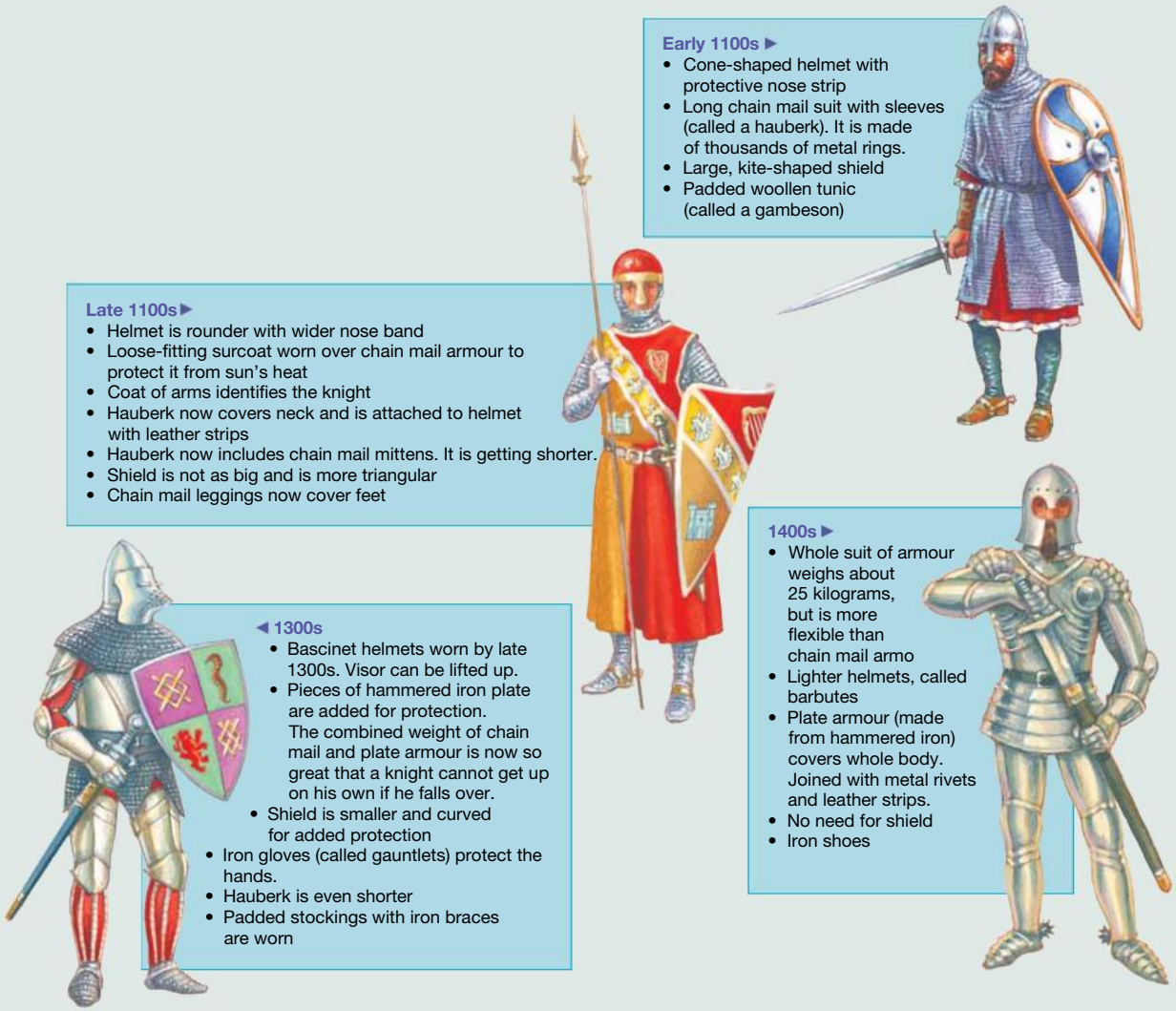
SOURCE 4 From *The History of the Art of War in the Middle Ages* by C. Oman, published in 1924. The battle described here is between Swiss and German infantry.

The two bristling lines of pikes crossed, and the leading files were thrust upon each other's weapons by the irresistible pressure from behind. Often the whole front rank of each **phalanx** went down in the first onset, but their comrades stepped forward over their bodies to continue the fight.

3.6 SkillBuilder activity COMMUNICATING

Refer to **SOURCE 5** and your broader knowledge to answer the questions.

SOURCE 5 The development of the knight's armour: change and continuity



1. **Describe** how the knight's weapons and armour changed between the early 1100s and the 1400s. **List** at least four things that changed (this might include changes in function, appearance or shape).
2. **Explain** why the shield disappeared as armour in medieval Europe by the 1400s.
3. **Use** the images in the source to **clarify** why knights were always from wealthy families.

3.6 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5, 8	3, 4, 7	6, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** the purpose of the mounted warrior.
   A. To terrorise and destroy foot soldiers and break up their formations
   B. To travel a greater distance
   C. To lead soldiers into battle
   D. To give soldiers directions during a battle
2. **Identify** the reasons why guns were not as popular as longbows and crossbows during the Middle Ages.
   A. They were very slow to load and inaccurate.
   B. People did not know how to use guns.
   C. They were liable to blow up.
   D. They were ineffective at causing damage to the target.
3. **Recall** three weapons used by fighters in a medieval battle.
4. **Identify** one way a medieval battle differed from a modern-day battle.
5. Closely **examine** the trebuchet in **SOURCE 2** and complete the following passage.
   A trebuchet was a giant _____ that medieval armies used in battle. They could sling _____ to cause damage, or hurl the _____ of dead animals or slain enemies to _____ and spread _____ among the besieged population.

ANALYSE AND APPLY

6. **Explain** why you think that the knight is often seen as a symbol of the Middle Ages.
7. **Clarify** why weapons and armour changed over time. Think of things like protection and comfort.
8. Closely **examine SOURCE 1**. **Name** the weapons that were used in this battle.
9. **Examine SOURCES 1**, **3** and **4**.
   a. What can you tell from each of these sources about the effectiveness of pikes in battles?
   b. What can you tell from each of these sources about the risk to horses in battle?
   c. What can you tell from each of these sources about why tight formations were used in medieval battles?
   d. What can you tell from each of these sources about why there were high casualties in the front ranks?
10. Using what you have learned about knights in this lesson, **construct** a short paragraph exploring why mounted soldiers (knights) became less and less useful in battles as warfare technologies changed. In preparing your answer, **recall** the types of weapons used in medieval warfare and how they changed, as well as the formations that were used.

Answers and sample responses for this topic are available online.

LESSON 3.7 How were people punished for committing crimes in medieval times?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** the types of crimes committed in the medieval period and the different punishments for different groups of people
- **explain** how these punishments changed over time.

Tune in

This device was found in most villages and towns in medieval times. It was intended as a form of corporal punishment.

Discuss the following questions and suggest answers.

1. **What is the purpose of punishment? Why do we have it?**
2. **Is public humiliation worse than other types of punishment? Explain your answer.**
3. **What do you think is the difference between corporal and capital punishment?**

SOURCE 1 A pillory in a village square

3.7.1 Community justice

In medieval Europe, most people lived in villages on feudal manors or in crowded towns behind city walls. There was no police force, so people had to protect themselves. The community was hierarchical, with lords or their reeves dispensing justice. Later, villages had volunteer constables and watchmen.

Crimes were dealt with in several ways:

- **Hue and cry:** When someone saw a crime, they called out an alarm. Neighbours had to catch the criminal. If the criminal resisted, they could be killed.
- **Tithing arrest:** All males over 12 years old were responsible for ensuring everyone followed the law. Households were organised in groups of ten (tithing). If someone broke the law, the tithing had to arrest them and take them to court. If they didn't, they were fined.
- **Posse comitatus:** If a criminal was on the run, the local sheriff could call on men to help catch them.

3.7.2 Public humiliation

An accusation of disturbing the peace meant the crime affected the community's security. In medieval times, this included public drunkenness, violent arguing, brawling, and swearing. Punishments aimed to deter others by publicly humiliating the offenders.

Those accused were often put in stocks or the pillory. Stocks restrained the feet or hands, while the pillory was more severe, locking the head and hands (or feet) in a wooden restraint. Offenders were left all day in the town square. Villagers would jeer and throw rotting vegetables at them.

SkillBuilder discussion

Using historical sources

1. Look at **SOURCE 2**. What does the scold's bridle tell us about the treatment of women and societal attitudes towards them in medieval times?
2. How might wearing a scold's bridle affect the physical and emotional wellbeing of the person subjected to it?
3. What behaviours or actions were punished by making someone wear a scold's bridle?

SOURCE 2 A woman wearing a scold's bridle

Women accused of gossiping faced harsh punishments. These included:

- the scold's bridle: a heavy iron muzzle with a bit that silenced the woman, causing pain and humiliation as she was paraded around town
- the ducking stool: a stool attached to a wooden arm over water, where the accused was repeatedly dunked, often for gossiping, scolding, or perceived witchcraft.

Theft was common, with punishments ranging from fines to mutilation (losing ears, hands, or being blinded) and public flogging.

When the Normans took power in England in the 11th century, they mostly kept the Anglo-Saxon system but introduced new forest laws, banning people from common lands now owned by the monarch. Permits were required for hunting or taking timber, generating revenue for the Normans. They severely punished poachers.

The Normans also introduced the murdrum fine, designed to deter Anglo-Saxons from secretly killing Normans. Where a Norman was killed, the whole village had to pay a fine (and the culprit was executed, if found).

3.7.3 Trials

Trials by jury were held in the manorial court. All male villagers had to attend several times a year or they would be fined. The lord's steward or reeve oversaw the court, and the jury was made up of 12 village men. The jury decided if the accused was guilty and what the punishment would be.

Trial by ordeal was used for serious crimes across Europe. Different ordeals were used to determine guilt or innocence. In the ordeal by fire, the accused took a hot iron bar from a fire and walked with it. Their hands were bandaged, and after three days, the wounds were checked. If they started to heal, the person was innocent; if not, they were guilty. In another form, trial by hot water, the accused had to retrieve an iron bar or ring from boiling water.

In trial by water, the accused was tied up and thrown into a lake or river. If they sank, they were innocent; if they floated, they were guilty. In 1215, the Pope banned trials by ordeal, and they stopped in Europe over the next few years.

Another form of trial, available only to the nobility, was trial by combat. It involved a fight to the death to establish innocence. However, it was not strength that people believed won the battle but the support of God; hence, if the accused won the battle, then they were considered innocent because God had spared them. This practice was replaced at the end of the Middle Ages by trial by jury.

SOURCE 3 Trial by hot water

3.7.4 Crimes against the Church

Along with the monarchy, the Church was very powerful in medieval Europe. Crimes against the Church were punished severely to control the population and maintain Christian beliefs. **Blasphemy**, refusing to acknowledge God or the Church, was a serious sin. Punishments included cutting out the tongue, stoning, or hanging. **Heresy**, holding different religious beliefs, was also punished harshly. **Heretics** were often burned at the stake.

Witchcraft was seen as heresy because witches were believed to be the devil's companions. Witches were blamed for diseases and natural disasters. The trial by water was used to test if someone was a witch; if found guilty, they were burned at the stake. Many accused witches were women, especially older herbalists or midwives.

The Church offered **sanctuary** to those accused of serious crimes. If they reached a church and confessed, they could stay for 40 days without arrest. After that, they had to choose between leaving the country or being hanged.

3.7.5 Treason

The most serious crime was treason, which included plotting against the monarch, conspiring with foreigners, and leading a rebellion. To maintain power, the monarch had to remove their enemies. Nobles who betrayed the monarch were thrown into dungeons to await trial. If found guilty, they faced terrible punishments like being burned at the stake, flayed alive, or hanged, drawn and quartered.

Hanging, drawing and quartering meant the person was hanged until nearly dead, then pulled apart by horses, and finally cut into quarters, with their body parts thrown into a fire. The executioner tried to keep them alive and in pain until the end. These brutal executions were meant to warn others. The public was encouraged to watch, treating them as a form of entertainment (see **SOURCE 4**).

SkillBuilder discussion

Using historical sources

1. **SOURCE 4** is an illustration of a public execution. What emotions and reactions can you observe in the audience watching the execution?
2. How does the image depict the method of execution and the role of the executioner?
3. What can the setting and surroundings in the image tell us about the significance of public executions in medieval society?

SOURCE 4 A public execution complete with audience

3.7 SkillBuilder activity USING HISTORICAL SOURCES

1. Review this lesson for the different forms of punishment dealt out in the medieval period. **List** them in your exercise book.
2. For each of them, write either 'obsolete', which means that it is completely out-of-date, or 'connections to today'. For those for which you can see connections to today, write a few sentences and **explain** how they relate to today's justice system.
3. Share your list with the class and see if you have any common elements. As a class, **discuss** whether you believe that the modern Australian justice system has any common elements developed from medieval European justice.

3.7 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 8	6, 7, 9, 10

REMEMBER AND UNDERSTAND

1. **State** what was 'hue and cry'.
   A. When a criminal is unfairly attacked and complains to the constable about their treatment
   B. When observers to a crime call out an alarm and everyone nearby has to try to catch the law-breaker
   C. When neighbours complain about each other and must settle it in court
   D. When the offender is identified by the victim in front of everyone
2. **Recall** a common punishment for public drunkenness.
3. **Determine** if the following statements are True or False.
   a. The murdrum fine was designed to protect the whole village.
   b. Crimes against the Church weren't considered serious and only carried minor punishments.
   c. Medieval punishments generally avoided humiliating the offender.
   d. Men in tithing groups were required to arrest anyone in their group who broke the law.
4. Complete the following sentence:
   Trial by _____ was held in the manorial court and involved _____ men deciding judgement on the accused. Trial by _____ involved physical challenges from which _____ would protect the innocent. Trial by _____ involved a physical fight where the innocent person would be spared by _____.
5. **Recall** the two crimes that were believed to be against God and the Church.

ANALYSE AND APPLY

6. a. **List** the common medieval punishments that you have read about in this lesson in two columns: corporal punishment and capital punishment.
   b. Thinking back to your discussion about the purpose of punishment, **discuss** some conclusions about the purpose of medieval punishment.
7. **Identify** any difference in the justice dealt to a peasant compared to the nobility.
8. a. **SOURCE 4** shows another form of capital punishment not mentioned in the text of this lesson. **State** what it is.
   b. Using **SOURCE 4**, and your broader understanding from the lesson, **explain** why the public was encouraged to view executions.

EVALUATE AND COMMUNICATE

9. **Consider** how medieval rulers managed to overcome their lack of a police force. In your answer, **explain** how they managed to keep an orderly society without police.
10. **Evaluate** how the power structures in medieval society were reflected in the punishments for crimes.

Answers and sample responses for this topic are available online.

LESSON 3.8 What was the power and authority of the Church in medieval times?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **explain** Church's power in terms of its control of wealth, land and labour
- **identify** its hierarchical structure with the Pope at the top.

Tune in

Imagine viewing this painting in a dimly lit medieval church with the smoky scent of incense in the air. Paintings such as this were common in churches in the medieval times. However, they were not there only as art, but rather to persuade the congregation about a particular viewpoint. Let's look more closely at this painting to work out what that viewpoint was.

1. **Examine the painting in SOURCE 1 very closely and discuss what is happening in each part of the scene.**
2. **Propose what effect a painting like this was intended to have on people's behaviour.**
3. **Share your ideas on how images like this would increase the power of the Church in medieval times.**

SOURCE 1 A medieval painting depicting what happens to people when they go to hell

3.8.1 The authority of the Church and the Pope

Christianity stemmed from the Jewish religion, Judaism, in the first century CE. It spread throughout Europe after becoming the official religion of the Roman Empire. Following the fall of Rome, it became entrenched as the principal religion across Europe. For many reasons, cultures turned away from their traditional belief systems and adopted Christianity.

The Roman Catholic Church was the main institution in western Europe. Its rituals were similar everywhere, and it used Latin, though only the clergy spoke it. Everyone had to follow Church law and attend **Mass**. Priests often gave **sermons** in the local language to remind people of their Christian duties.

SkillBuilder discussion

Historical significance

1. Look closely at **SOURCE 2**. What architectural features of Canterbury Cathedral identify it as Gothic?
2. How does the design and decoration of Canterbury Cathedral reflect the religious and cultural values of the medieval period?
3. What might the construction and maintenance of such a grand cathedral tell us about the society and economy of medieval England?

SOURCE 2 Canterbury Cathedral in Kent, England. This is a typical example of Gothic architecture.

Did you know?

In 2019, one of the most beautiful and iconic representations of medieval Gothic architecture, Notre Dame Cathedral in Paris, was badly damaged in a devastating fire. The probable cause was an electrical fault in the old building, which destroyed the roof and spire. The French government hope to have it fully restored by 2027.

The Catholic Church was led by the Pope, a role that traced its origins to St. Peter's founding of the Roman church. After the fall of the Western Roman Empire in 476 AD, the Pope's power grew, especially under Pope Gregory the Great (590–604). Gregory transformed the papal power by effectively governing Rome when its old systems had collapsed, reorganising the structure and leadership of the Church, and spreading Christianity through missionaries. This new papal authority continued to grow through the Early Middle Ages, with later popes building significant alliances with powerful rulers like Charlemagne, who was crowned by the Pope in 800 AD. These political partnerships made the Pope very powerful – monarchs wanted his support because his approval made them look good and righteous in the eyes of their people.

3.8.2 The hierarchy of the Church

Cardinals, **archbishops** and **bishops** supported the Pope, advised lords and monarchs, and held key government positions. Below them were parish priests, **nuns**, monks, and friars. These clergy took the Church's message to villages and collected taxes called tithes, which were 10 per cent of a person's income or produce.

Anyone acting against the Church could be excommunicated, meaning they couldn't attend Mass or receive **sacraments** and were told they would go to hell. The Church instilled fear of hell in everyone.

3.8.3 The parish church and the cathedral

Almost every village had a parish church, often the largest building and made of stone or brick. Built by peasant labor, the parishioners felt a sense of achievement. Church walls and stained-glass windows depicted Bible scenes to teach the mostly illiterate congregation. Church bells helped people keep track of time. The church was also a community centre and school for those studying for the priesthood.

The bishop's church — the cathedral

Many European cities have at least one **cathedral**, some built in the Middle Ages. The word 'cathedral' comes from the Greek word 'kathedra', meaning seat, referring to the bishop's seat or throne. The bishop ran his diocese from the cathedral, which was divided into parishes.

The cathedral's importance was reflected in its size and magnificence, towering over other buildings. Many cathedrals took over a hundred years to build and were completed long after their architects had died.

3.8 SkillBuilder activity HISTORICAL QUESTIONS

You have learnt about the power of the Catholic Church and the Pope in the medieval period. However, you know that, whilst there are still many people who follow the Catholic religion today and the Pope is still the head of the Church, it does not govern our lives in the same way that it did for the people of the Middle Ages. Some of this can be traced back to the growing concern of medieval people about corrupt practices they saw in some of the clergy.

Francesco Petrarca (Petrarch) was an Italian scholar and poet of the fourteenth century. He was a devoted Catholic himself and visited Avignon to stay with a mentor of his, a cardinal.

Read the extract from his letter and answer the guiding questions below.

SOURCE 3 Petrarch, Letter to a friend, 1340–1353

...Now I am living in France, in the Babylon of the West. The sun in its travels sees nothing more hideous than this place on the shores of the wild Rhone, which suggests the hellish streams of Cocytus and Acheron. Here reign the successors of the poor fishermen of Galilee; they have strangely forgotten their origin. I am astounded, as I recall their predecessors, to see these men loaded with gold and clad in purple, boasting of the spoils of princes and nations; to see luxurious palaces and heights crowned with fortifications, instead of a boat turned downward for shelter.

1. List the words and phrases that show he hates Avignon.
2. Find evidence to show that he thinks the clergy in Avignon are corrupt.
3. Draw conclusions about what he thinks they should be like instead.

Source: from J. H. Robinson, *Readings in European History* (Boston: 1904), p. 502.

Write a list of questions that Petrarch might have for the Pope and then share your ideas on why people began to doubt the overwhelming power of the Church.

3.8 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5, 6, 10	7, 8, 9

REMEMBER AND UNDERSTAND

1. No particular religious institution dominated western Europe during the Middle Ages. True or False?
2. **Latin/Italian/vernacular/English** was used in the medieval Mass.
3. **Recall** who was the head of the Roman Catholic Church and what power he had.

4. Unpaid _____ did most of the work in building the parish _____. The sense of achievement and communal _____ made people feel part of the _____.
5. **Explain** why cathedrals were so enormous.

ANALYSE AND APPLY

6. **Compare** and **contrast SOURCE 1** and **SOURCE 2**. **State** which one was a more effective way of making an impression on the medieval population. **Explain** your answer in detail.
7. **Construct** a diagram that illustrates the hierarchy of the Church.
8. **Explain** why you think that the Catholic Church ensured that medieval people feared the idea of hell.
9. **State** some of the methods that the parish churches used to create a sense of community.
10. **Identify** five ways the Roman Catholic Church demonstrated its power over the people of medieval Europe.

Answers and sample responses for this topic are available online.

LESSON 3.9 What was the power of the written word?

LEARNING INTENTION

By the end of this lesson you should be able to

- **explain** the importance of the medieval manuscripts of monastic scribes in holding ancient and medieval texts as well as passing on the ideas
- **understand** the importance of developing the technology of books as beautiful artworks.

Tune in

Medieval manuscripts were handwritten and took a long time to complete. Many also had illustrations, which were called illuminations.

SOURCE 1 A medieval illuminated manuscript from the Czech Republic

Look closely at **SOURCE 1** and see if you can identify any of the following used in this manuscript:

- the language
- the colours
- the image in the historiated initial
- the layout.

Discuss its similarities with modern books and the key differences you can see.

3.9.1 The role of monks and monasteries

SkillBuilder discussion

Using historical sources

1. Refer to **SOURCE 2**. What can we learn about the role of education in medieval society from this illustration?
2. How does the illustration depict the relationship between the boy, his parents, and the monastic school?
3. What details in the image suggest the importance of monastic schools in the thirteenth century?

An important feature of early Christianity was the role of monks, nuns and the communities in which they lived. A monk or nun was a person who chose to withdraw from society in order to live according to strict Christian principles. Communities were formed, with rules governing every aspect of their lives in order to ensure their obedience to God. These communities of monks lived in monasteries; nuns lived in convents. Many communities were built in isolated places, both for their protection and to free them from worldly distractions and influences.

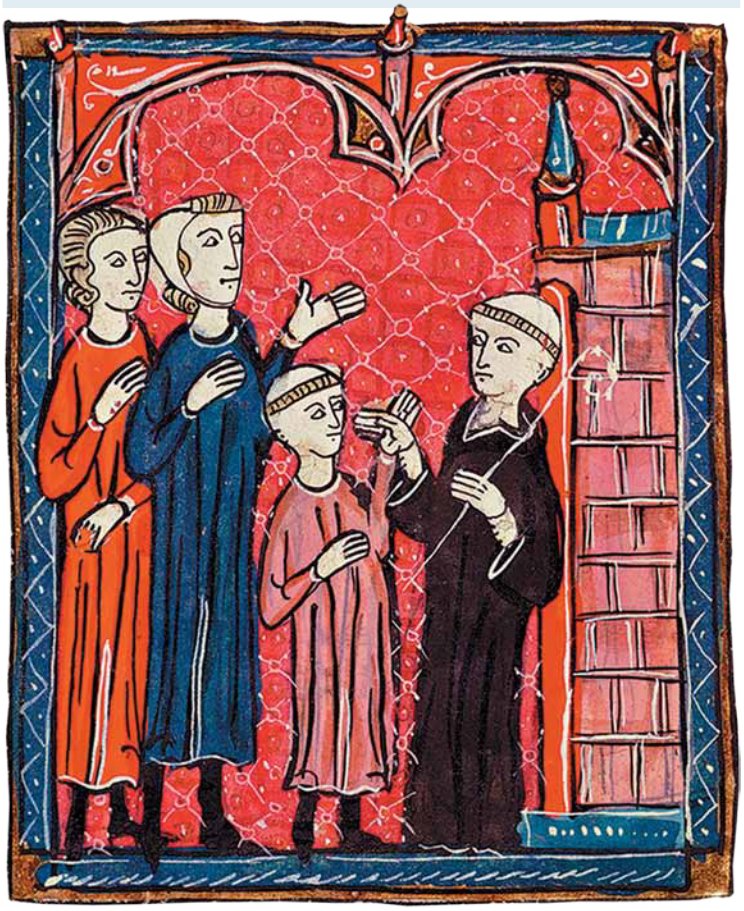
Some played important roles in the community. Many had schools attached to them. The monks were some of the only people who could read and write in these times and they passed this on to their young novices (see **SOURCE 2**).

Justice and law were dispensed by the abbot (the leader) in the towns that developed around the monasteries or convents. People gave money in the belief that this would please God. Sometimes people were forced to pay taxes to the religious community for the use of their land or to sell produce in the markets. This made some of them very rich and powerful.

Did you know?

Religious life was the main way that a woman could gain more freedom in medieval society. A great example of this is Hildegard of Bingen. Born in the 12th century, she emerged as one of the most remarkable figures of the Middle Ages. As the leader of a Benedictine abbey in Germany, she showed talent in a range of areas: she composed religious music, advanced the study of medicine and natural science, and recorded her mystical visions through detailed illustrations as well as other areas. She influenced popes and monarchs during a time when women rarely held such authority. Hildegard's diverse achievements in theology, medicine, music and literature have established her as one of the medieval period's most distinguished intellectuals.

SOURCE 2 A thirteenth-century illustration showing a boy being brought by his parents to a monastic school



3.9.2 Literacy in the Middle Ages

The Church was the main source of literacy during the Middle Ages. Before the printing press, every book had to be handwritten. Monks and sometimes nuns wrote, copied and decorated books by hand. These books were used to teach students. By copying them, they saved many classical texts from Greece and Rome, which were written on fragile parchments. Translating these texts into Latin made them more accessible, as Latin was widely read and understood.

Many ancient ideas also came into Europe through the Moorish Arabs in Spain, who valued books and libraries. This gave them access to the ideas of many great ancient philosophers.

3.9.3 Illuminated manuscripts

Creating a book, or manuscript, in medieval times was extremely laborious. It started with the preparation of the writing material (parchment) or its finer version (vellum). This was animal skin that was prepared by scrapping and stretching, until a smooth and durable surface was created. This was trimmed to the size needed. The scribe would write on the parchment using a quill and ink. The quill was a feather cut to a fine point and dipped in ink, which was made from some minerals or vegetable dye.

Once the scribe finished writing, an illuminator would illustrate the text. These illuminations were as important, or even more important, than the words. Illuminators sketched and painted images beside the text, including decorated letters and illustrations. They used precious metals, dyes and minerals for colours, which are still beautiful today (see **SOURCE 3** from the *Book of Kells*, a gospel from medieval Ireland).

Later, the printing press was invented around 1440 by Johannes Gutenberg in Germany. This made illuminated manuscripts obsolete. The printing press allowed ideas to spread much faster, as books and pamphlets could be created quickly. Historians credit this spread of ideas with helping to start the Renaissance. See lesson 3.9 in Topic 3 Renaissance Italy for further information on the development of the printing press.

SOURCE 3 An illuminated letter from the *Book of Kells*

3.9 SkillBuilder activity USING HISTORICAL SOURCES

Written and illustrated by twelfth-century French nun Herrad of Landsberg, the *Hortus Deliciarum* (*Garden of Delights*) is a beautifully illustrated compendium of other twelfth-century texts, such as poems, texts by classical writers, illustrations and music.

Herrad of Landsberg was the abbess (leader) of a convent. She collected the texts and also wrote a number of the poems with messages to her fellow nuns. It is surmised that she drew the illustrations as well, of which there are over 300.

The original was destroyed in a fire around 1870, but luckily fragments were copied and saved. This is a rich text that tells modern historians much about the time in which it was created, but also about the extraordinary woman who was Herrad of Landsberg.

Conduct research to find fragments of the illustrations from the *Hortus Deliciarum.* Collect these digitally as a class and **compare** the different sections.

- What texts and illustrations did you find?
- What do these tell historians about Herrad and her community, as well as the times in which she lived?

SOURCE 4 The illustration of Hell in the *Hortus Deliciarum* by Herrad of Landsberg

3.9 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 3, 4	1, 5, 8, 9	6, 7, 10

REMEMBER AND UNDERSTAND

1. **Explain** why someone might become a monk or nun.
2. **Recall** how people could gain an education in the early medieval period.
3. Medieval religious communities contributed to the survival of many ancient _____ and _____ literary texts.
4. **Recall** what vellum and quills were made of.
   A. Animal skins and feathers
   B. Velvet and feathers
   C. Animal skins and sticks
   D. Papyrus and metal
5. **Determine** if the following statements are True or False.
   a. The illuminations, or drawings, in a medieval manuscript are so named because the precious metals used shone and caught the light thus illuminating the text.
   b. The Church was one of many sources of literacy during the Middle Ages.
   c. Illuminated manuscripts became obsolete when the printing press was invented.
   d. Many ancient Roman and Greek texts were destroyed forever due to the process of copying them for teaching purposes.

ANALYSE AND APPLY

6. **Examine SOURCE 2**. What conclusions can you draw about the Church and its importance to people of the time?
7. **Analyse SOURCE 3** and **explain** how it was created.
8. **Explain** the difference between a scribe and an illuminator.
9. **Explain** why Latin was such an important language in medieval times.
10. Imagine that you are a young novice entering the convent of Herrad of Landsberg in Alsace, France. **Describe** the advantages that you would have as a nun in this protected abbey, compared to if you had remained in secular society.

Answers and sample responses for this topic are available online.

LESSON 3.10 Inquiry: Was King Arthur real?

LEARNING INTENTION

By the end of this lesson you should be able to explain how historians have disproved medieval myths such as King Arthur

Scenario

What TV shows, books, films or computer games come to mind when you hear about King Arthur? Do you have any idea who he was? Merlin? Or the Knights of the Round Table? Sir Gawain? The sword in the stone, Excalibur?

There are so many stories about the Saxon King Arthur, who supposedly fought enemies in early medieval Britain and united the kingdom. These stories can be traced back to early medieval manuscripts but they all offer different perspectives. Historians have attempted to trace the myths back to see if they began as a fact, but no one has been able to produce a definite answer. The twenty-first century consensus seems to be, however, that King Arthur was nothing more than a fictional character.

Even though most historians do not believe that King Arthur existed, there are still many people who disagree and argue that he might have.

SOURCE 1 Are you familiar with the myth of the sword in the stone?

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching

Discuss the following:

a. Why might people still believe in King Arthur? **List** the points for this argument.
b. Why might they not believe? **List** the points for this side.

Construct your inquiry question.

Investigate your question.

Step 2: Using historical sources

Analyse the key points that arise in the process of your research.

Step 3: Historical perspectives and interpretations

Compare both sides of the argument.

Step 4: Communicating

Justify your perspective.

- Historians will argue with each other about controversial or contested ideas.
- Hold a class debate where you **discuss** (argue for or against) the possible existence of King Arthur and whether there is some truth behind the myth.
- **Construct** the criteria by which you will decide the winner of this debate.

Complete your self-assessment using the **Inquiry rubric** or access the 3.10 exercise set to complete it online.

LESSON 3.11 Inquiry: The *Magna Carta*

LEARNING INTENTION

By the end of this lesson you should be able to:

- **ask** historical questions about the impact of the *Magna Carta* on different social groups
- **develop** specific questions that will direct your investigation.

Background

The *Magna Carta* is a royal charter of rights that was signed by King John of England and his barons in 1215. It was designed to create peace between King John and his barons by ensuring that, from the moment it was signed, the monarchs of England were bound by the law and could not just make their own laws as it suited them. King John of England had been particularly disliked because he was seen to be an unfair king who taxed his barons heavily to pay for the wars he kept fighting, among other things. The barons eventually revolted and the conflict came to a head when they presented King John with a list of demands at Runnymede in 1215. He signed what became known as *Magna Carta* (the Great Charter) and they re-swore their feudal oath of loyalty to him.

SOURCE 1 The *Magna Carta* (1297 version, Parliament House, Canberra, Australia)

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching

Choose one of the groups listed below and **create** focused research questions that you could use to **investigate** the impact of the *Magna Carta*. **Construct** your inquiry question.

- Nobility
- Religious orders and the Church
- Merchants
- Artisans/craftspeople
- Peasants

Use the following question starters to **construct** some questions that might help to direct your research about your chosen group.

- For example:
  - Who was … ?
  - How significant was … ?
  - What effects did … ?

Investigate your question.

You may use a variety of sources including websites to begin making notes to answer your research question. The following websites may be helpful:

- the *Magna Carta* in the British Library
- the *Magna Carta* in the UK National Archives
- the significance of the *Magna Carta* to Australians

Step 2: Using historical sources

Analyse the information you have found. **Determine** whether it answers the inquiry question.

Step 3: Historical perspectives and interpretations

Collate your information by using your research notes to **propose** answers to your amended research questions. Remember that your original task was to investigate the *Magna Carta* and the impact that it had on one of the following social groups:

- Nobility
- Religious orders and the Church
- Merchants
- Artisans/craftspeople
- Peasants

Step 4: Communicating

Discuss with your teacher and class how you would like to present this information.

Complete your self-assessment using the **Inquiry rubric** or access the 3.11 exercise set to complete it online.

LESSON 3.12 What were the changing relations between Islam, Christianity and Judaism in the Middle Ages?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **explain** the changing relations between Islam and Europe
- **explain** the Catholic Church's attitude towards medical science during the Middle Ages.

Tune in

Religion still plays a very important part of daily life in Australia today. The Australian census in 2021 revealed that only 38.9 per cent of the population wasn't religious.

While people still pray for those who are sick, as seen in **SOURCE 1**, medical science is more often relied upon for treatment. What do you think prompted this change?

1. **Discuss whether you think religion should play a part in treatment for illness and disease. What benefits can it bring, and what challenges can it create?**
2. **Brainstorm the ways in which being part of a religious community can help in daily life — why do so many people believe in a higher power?**
3. **In the past, people mainly prayed when someone was sick. Today, while many still pray, most people go to doctors and use medicine first. What do you think caused this big change in how we treat illness? Give some examples from what you've learned about history.**

SOURCE 1 Prayer for the sick was considered to be more important than medical science.

3.12.1 The importance of religion

Religious beliefs, especially those stemming from the Roman Catholic Church, were central to medieval European life. People believed good things were rewards for good deeds and illness was a punishment. Most people were illiterate and superstitious, relying on priests for education and guidance. Non-Christians were viewed with suspicion and hatred. When bad things happened, people looked to the Bible for explanations, often believing they were being punished for their sins.

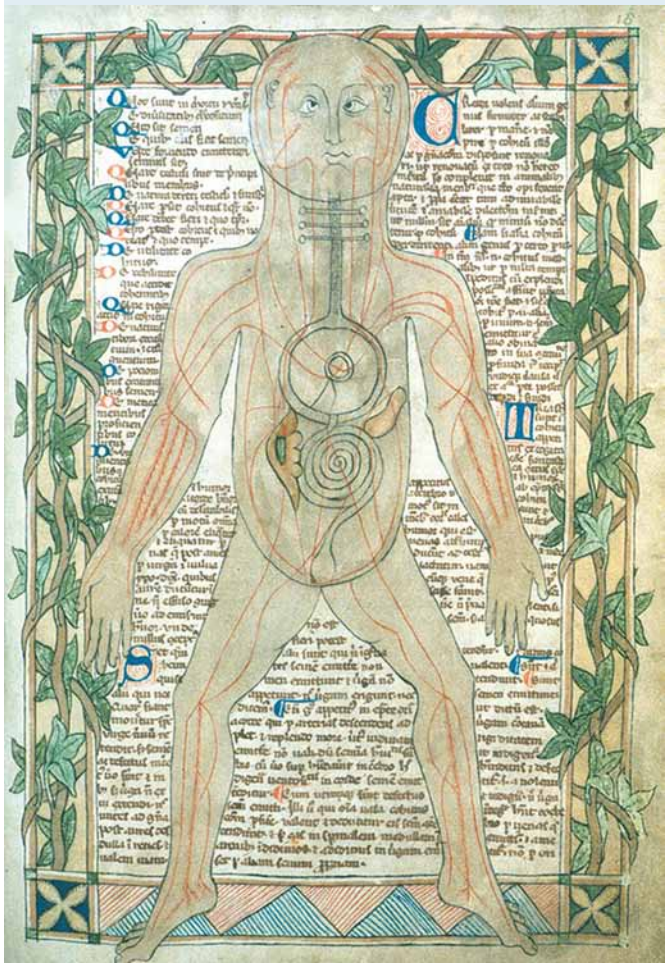
Islamic leaders turned to sacred texts for guidance during times of plague, drawing on three key principles: (1) Plague was viewed as a mercy from God and a form of martyrdom for faithful Muslims; (2) Muslims were advised not to enter or leave areas affected by plague; and (3) Illness was believed to

originate from God, rather than through contagion. While these principles were not always consistently observed, they illustrate one of the many ways in which different societies, including those with interconnected cultural and religious traditions, responded to disease.

3.12.2 Religion and medical science

Because the Church controlled every aspect of education, the training received by medieval doctors had to be in accordance with religious teachings. All medical education carried out in universities was strictly in line with the beliefs of ancient physicians like Hippocrates and Galen. No new research was permitted because it was believed that the ancient teachings were complete and could not be contradicted. In 1300, Pope Boniface VIII prohibited the cutting up of corpses, so any attempt to study human anatomy was virtually impossible. This meant that even the most educated doctors had very little knowledge of human anatomy, making treatment of sickness difficult and any form of surgery almost impossible. **SOURCE 2** shows the limited understanding most doctors were working with.

SOURCE 2 This late thirteenth-century illustration of the human body was meant to display the flow of blood through the body.



Doctors and priests

Priests often took precedence over doctors, meaning that the doctor was permitted to assist only once the praying was finished. If the patient was important or wealthy, there might be a whole group of churchmen to offer prayers — depending on how advanced the disease was, the patient may be dead before the doctor was even allowed in the room.

3.12.3 Religious conflict

By the beginning of the fourteenth century, virtually all of western Europe was Roman Catholic. The Arabic conquests during the seventh century and onwards, and the later expansion of the Ottoman Empire, meant that most of the Middle East and North Africa followed Islam. Christians and Muslims looked at each other with suspicion, largely as a result of the Crusades and the efforts of Spanish Christians to recapture Spain from Muslim control. Since both religions viewed illness as a form of divine punishment, the people of each religion blamed the other for the Black Death when it ravaged their people. Christians also believed the Jewish people were responsible for the death of Jesus Christ. There were some unhelpful theories that Jewish people were less likely to catch the plague, and this led to accusations that they were poisoning the wells to make other people sick. This led to pogroms and massacres of Jewish communities (see **SOURCE 3**).

Despite Pope Clement issuing a decree declaring Jewish people innocent, the **persecution** continued from 1348 until the early 1350s throughout most of Europe.

SkillBuilder discussion

Using historical sources

1. Look at **SOURCE 3.** What purpose did forcing Jewish people to wear yellow badges serve in medieval society?
2. What message was the artist trying to communicate through this illustration?
3. How can studying this historical persecution help us address discrimination today?

SOURCE 3 A medieval illustration showing a group of Jews being burnt at the stake. Jewish people were required to wear a yellow circle badge to identify themselves.

3.12 SkillBuilder activity HISTORICAL SIGNIFICANCE

Ibn Khaldun was an Islamic scholar who has given us great insight into the Black Death across the Middle East and Europe. Your task is to **create** a one-page biography to help other Year 8 students understand his influence.

To begin, **investigate**, by conducting research, and find three points of interest on each of his:

- life
- philosophy
- publications.

Ensure you use and refer to multiple sources. Include an accurate biography to show which references you used.

Demonstrate your understanding of the medieval period through your writing and remember your audience and purpose.

Your biography could be a visual one with annotations and shorter chunks of information.

3.12 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 3, 5	1, 6, 7	4, 8, 9, 10

REMEMBER AND UNDERSTAND

1. **Describe** the attitude of the medieval Church towards medical science.
2. **Determine** if the following statements are True or False.
   a. There was a great deal suspicion between Christians and Muslims during the Middle Ages.
   b. Cultural differences led to a great deal of discrimination.
   c. Different religious communities worked together to find the source of the disease.
   d. Doctors were considered to be more important than priests in the treatment of the sick.

3. **Explain** why Islamic leaders suggested that a Muslim person 'should not enter nor flee from a plague-stricken land'.
   A. They believed Muslims could not get sick.
   B. They believed the plague was spread by people.
   C. They feared being blamed for the plague.
   D. They were told to say that by the Christians.
4. Based on the evidence you've been provided, **identify** which group Christians blamed for the Black Death.
5. During the fourteenth century, Muslims and Christians viewed illness as a form of _____.

ANALYSE AND APPLY

6. **Propose** a reason why Pope Boniface may have forbidden the dissection of corpses.
7. **Identify** two inaccuracies in the diagram of the body shown in **SOURCE 2**. **Explain** what prevented medieval doctors from finding out more about the human body.
8. **Identify** one way that the activity depicted in **SOURCE 1** could actually hinder medical treatment for illness.
9. **Explain** how we know that the people being burned in **SOURCE 3** were Jewish.
10. **Identify** an example of discrimination you were aware of during the COVID-19 pandemic.

Answers and sample responses for this topic are available online.

LESSON 3.13 What was the Black Death?

LEARNING INTENTION

By the end of this lesson you should be able to:
- **explain** what the Black Death was
- **identify** the origins of the Black Death.

Tune in

The Black Death was caused by the bubonic plague. This was a devastating plague that occurred at a time when little was known about how to control or treat disease.

The Black Death has returned many times, even recently enough that we have been able to photograph and document it.

1. **Brainstorm five reasons why diseases like this keep returning.**
2. **Examine SOURCE 1. What appear to be the symptoms of the bubonic plague?**
3. **Discuss the modern-day versions of the bubonic plague. What are they? Will they go away?**

SOURCE 1 The bubonic plague was so named because of the appearance of 'buboes', which were swellings of the lymph nodes.

3.13.1 Introduction

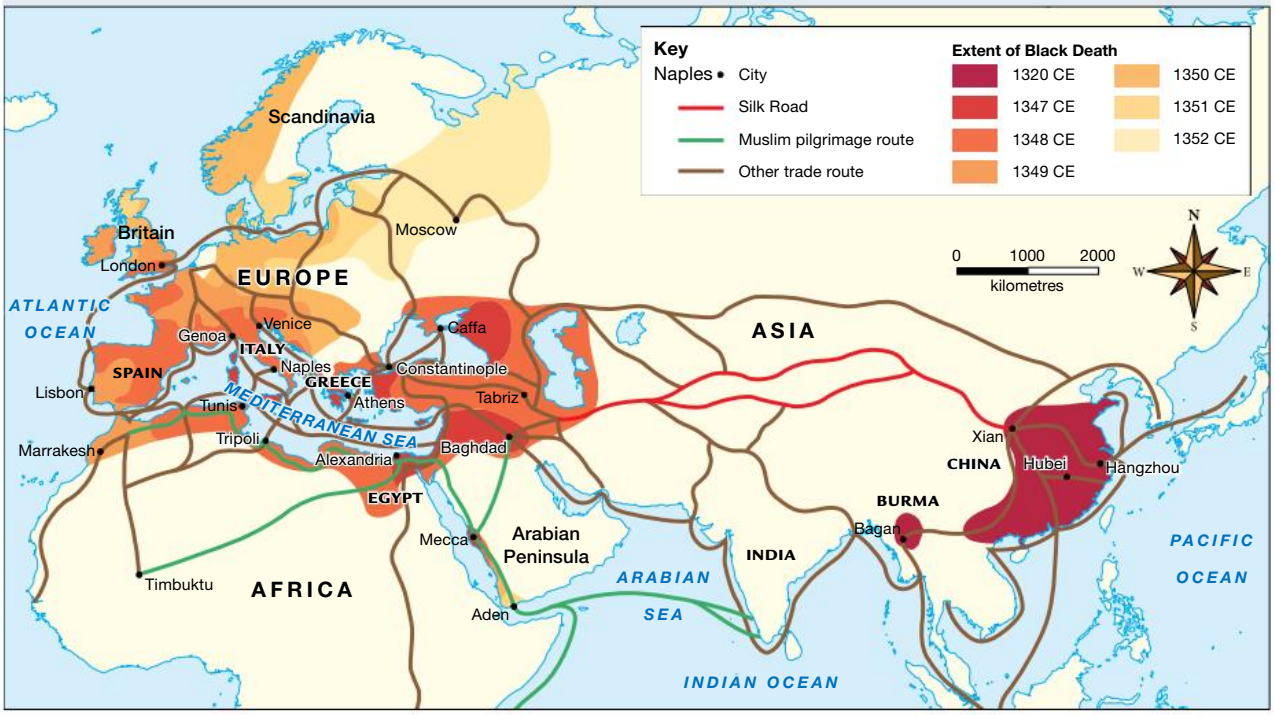
In the mid-1300s, people across the Middle East, Africa and Europe were suffering from a terrible plague, often referred to as the Black Death. It killed millions of people and, at the time, nobody knew what caused it. With our modern knowledge, we understand that fleas carried on rodents infected humans, but it was a terrifying time for those living through it.

Why 'Black Death'?

This name was first used in the 1700s (a long time after the actual event). People at the time simply called it 'the great dying' or 'the plague'. It has been given many names over the years, such as *morte bleue* (French for 'blue death'), *pestis atra* (Latin for 'terrible plague') and *magna mortalitas* (Latin for 'the great dying').

There are a few theories about the origin of the English name 'Black Death'. The most popular of these comes from the appearance of the disease in its final stages. At this time, small black or purple blotches appeared on the skin of those suffering from the disease as seen in **SOURCE 1**, and this may have contributed to the name.

SOURCE 2 The extent of the 'Black Death'



Source: Map drawn by Spatial Vision.

Historians now believe there were three diseases spreading at once during the plague.

1. Bubonic plague: The most recognisable, with swelling, pus-filled lumps called 'buboes' appearing in the armpits, groin, and neck. Recovery was possible, but other diseases made it less likely.
2. **Pneumonic plague**: Attacked the lungs and was always fatal.
3. Septicaemic plague: Aggressively attacked the bloodstream. The bacteria multiplied so fast that the person would die within hours of infection, causing purple-black blotches on the skin (see **SOURCE 1**).

3.13.2 Origins and spread of the plague

Origins

Bubonic plague is found, and is **endemic**, in western Arabian Peninsula, Kurdistan, northern India, and the Gobi Desert. It usually stays **dormant** but has caused major **pandemics** at different times. One theory is that, during the time of the Black Death, climate change forced rodents to move, spreading the fleas that carried the plague.

SkillBuilder discussion

Causes and consequences

1. How did fleas living on black rats transmit the bacteria that caused the Black Death to humans?
2. What role did black rats play in the spread of the Black Death across Europe?
3. How might living conditions in medieval Europe have contributed to the spread of the Black Death through fleas and rats?

SOURCE 3 The bacteria that caused the Black Death were transmitted by fleas living on the bodies of black rats.

Did you know?

When a flea became infected with the plague bacteria, the bacteria would multiply quickly and block the flea's feeding tube.

This would make the flea very hungry. It would try to feed on the blood of a host (an animal or human) but could not swallow the blood because of the blocked feeding tube.

The blood mixed with the bacteria would be **regurgitated** and enter the host through the open wound, leading to a new infection.

Transmission of the plague

In 1894, scientists identified a bacterium they called *Yersinia pestis* as the cause of all three forms of the plague. These bacteria were spread by different types of fleas, especially those living on black rats. When rats thrived, fleas could bite other animals and humans, spreading the bubonic or **septicaemic plague**. Fleas could bite many people, increasing the infection rate.

Pneumonic plague was the most contagious because it infected the lungs. It caused severe coughing, spreading bacteria into the air. Anyone nearby could breathe in the bacteria and get infected.

3.13 SkillBuilder activity **USING HISTORICAL SOURCES**

When living through catastrophic events such as a global pandemic, sometimes it's easy to forget that history books will look back at these times as areas of study. Consider the ways in which we are examining a pandemic nearly 1000 years ago and compare that to how the COVID-19 pandemic might be studied in future years.

1. **List** any sources people might use to better understand the time of COVID-19. You might like to include different sources that can help with examining:
   - social responses
   - religious responses
   - political responses
   - medical responses.
2. **Compare** these with the sources used in this lesson. **Determine** whether there are correlations (connections or relationships) between sources of the past and those you've chosen to highlight the impact of COVID-19.

3.13 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4, 7	6, 8

REMEMBER AND UNDERSTAND

1. Based on the descriptions provided, **identify** each of the three forms of the Black Death as either bubonic, pneumonic or septicaemic.

This form of the plague attacked the lungs and was always fatal.	
This form aggressively attacked the bloodstream and was characterised by bleeding into the skin, causing purple–black blotches to appear.	
This form was characterised by pus-filled swellings of the **lymph nodes** in the groin, armpits and on the neck.	

2. When a disease is normally located in one place, it is called _____.
3. **Describe** what buboes are.
4. a. **Identify** two parts of the world in which bubonic plague appears to be endemic.
   b. **Explain** why these parts of the world do not suffer from the plague all the time.
5. **Determine** if the following statements are True or False.
   a. **SOURCE 1** suggests that the Black Death was given its name because of the dark times that people were experiencing.
   b. Pneumonic plague was the most contagious form of the disease.
   c. Septicaemic plague aggressively attacked the lungs.

ANALYSE AND APPLY

6. **State** the current popular theory explaining why the plague suddenly moved beyond its endemic environment.
7. **Examine** the different names used for the Black Death. **Determine** what these imply about the understanding of disease people had and the effect it was having on their daily life.

EVALUATE AND COMMUNICATE

8. **Construct** a plan for a health alert poster helping people identify the symptoms of each type of plague associated with the Black Death. Your plan should include headings for each type of plague, with dot points beneath about the information you would include in your poster, and the images or diagrams you might include.

Answers and sample responses for this topic are available online.

LESSON 3.14 How did the bubonic plague spread?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **explain** the role of trade in the spread of the bubonic plague
- **describe** the distribution of the Black Death across three continents.

Tune in

Examine **SOURCE 1** and consider the relationship between trade and the spread of the disease.

SOURCE 1 Permanent human settlement led to the growth of towns and expansion of trade, which allowed the Black Death to spread more easily.

In groups, discuss the following questions:

- Why did people need to trade so much?
- There are some areas which were affected by the plague earlier than others — why do you think that is?
- Why are there large areas of the world unaffected — do you believe that they did not have any plague at all during this period?

3.14.1 Settlements and trade

The early fourteenth century was a time of rapid expansion of trade between Europe, North Africa and Asia. Wherever people traded, black rats and their disease-carrying fleas followed. Disease that had previously been confined to an area in Central Asia soon spread to populations that had no immunity to its infection.

Human settlement in the fourteenth century

The early medieval era saw many nomadic groups moving through Europe and Asia, invading new lands. Over time, these groups settled and established permanent villages and towns, which became centres of agricultural activity.

- Franks, Magyars and Goths transitioned from warriors to farmers.
- Vikings and Danes shifted from raiding to peaceful trade.

By the 14th century, most of Europe, southern and eastern Asia, and northern Africa were permanently settled. Nomadic lifestyles persisted mainly in northern and Central Asia and sub-Saharan Africa.

The growth of trade

Settled civilisations were quick to realise the benefits of peaceful trade. Networks of overland trade roads developed throughout Europe, the Middle East, Africa and Asia, connecting the rapidly growing towns and leading to the growth of some towns as major trading centres. These towns would regularly hold fairs to allow merchants to display and sell their wares. Major commercial **city-states** such as Genoa and Venice sent ships throughout the Mediterranean and to western and northern European ports. Trade between Europe and Asia expanded rapidly along the Silk Road, with China and many other centres through Central Asia coming into regular contact with European merchants.

3.14.2 Outbreak in Asia

Archaeological evidence suggests that the Black Death may have originated in China in the 1320s and 1330s.

- The first major outbreak likely occurred in Hubei province in 1334.
- Inscriptions in Issyk-Kul, Kyrgyzstan, suggest it may have started there, which provides an alternative theory.
- In the 14th century, China was largely ruled by the Mongols, who had strong links to Central Asia and may have brought the disease across.
- Increased trade between China and Europe via the Silk Road increased the potential for the Black Death to spread to Europe.
- European traders or Central Asian Tartar warriors (Mongols) could have carried the disease to Europe.

The siege of Caffa

In the thirteenth century, the Italian trading city of Genoa had taken control of Caffa, on the Crimean Peninsula, in modern-day Ukraine. Caffa was a major shipping port for trade throughout the Black Sea. In 1346 the Tartars attacked the city. They were supported by Genoa's bitter rivals, the Venetians, who had previously controlled Caffa. As they laid siege to the city, the Tartars began to fall sick from a serious disease and large numbers died in a very short time. Unable to maintain the siege, the Tartars began to withdraw, but before they did, they began catapulting the diseased bodies of their dead over the walls and into the city (see **SOURCE 2**). The Genoans who escaped from Caffa soon found they were carrying the Black Death. Venetian traders who had been present during the siege were also infected and both groups carried the deadly disease deep into the heart of Europe (see **SOURCE 3**).

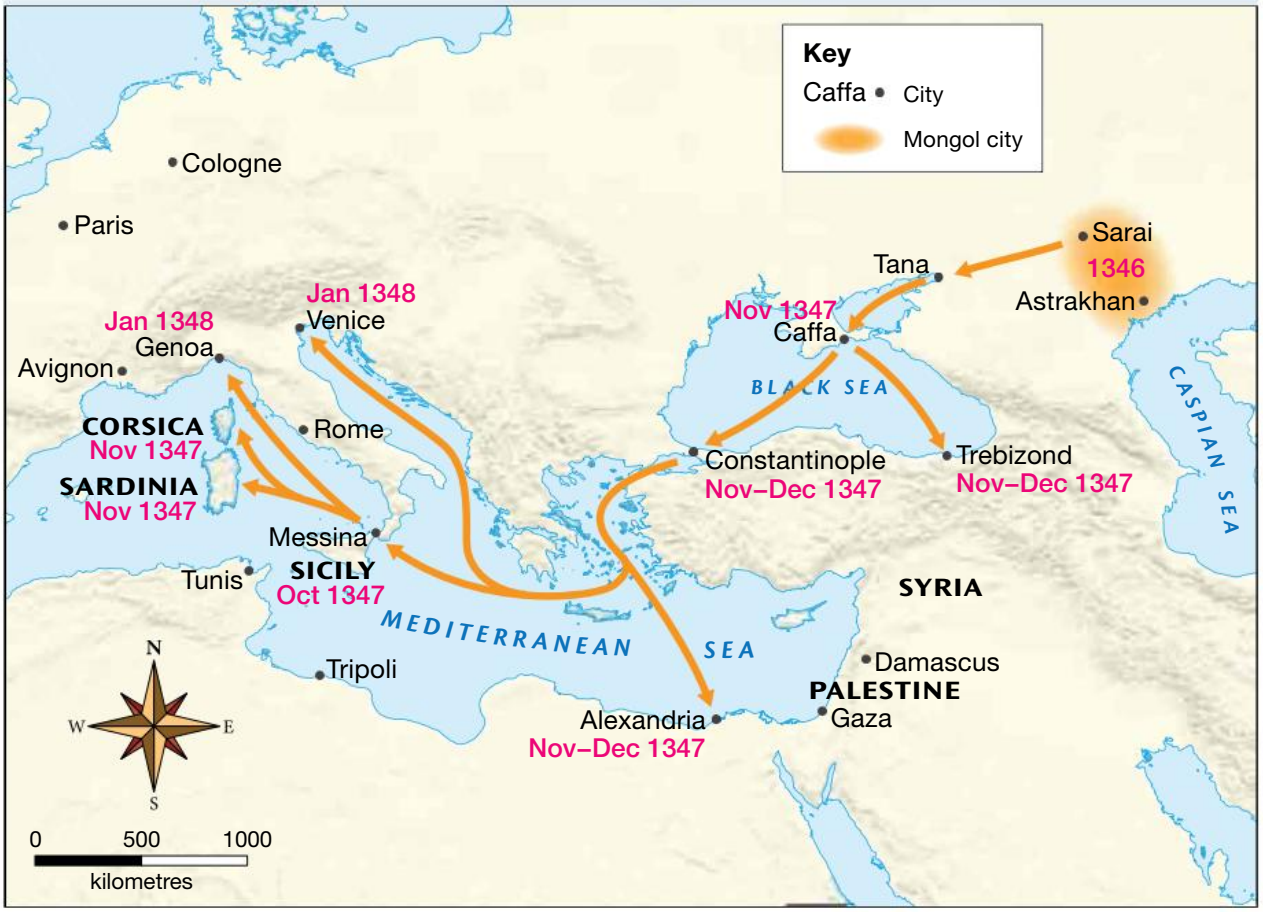
SkillBuilder discussion

Using historical sources

1. How did the use of infected bodies as projectiles impact the spread of disease within the besieged city of Caffa?
2. What does this tactic tell us about the methods of warfare and psychological strategies used during medieval sieges?
3. How might the defenders of Caffa have responded to this form of biological warfare?

SOURCE 2 When the Tartars attacked Caffa, they used trebuchets like the one shown in this illustration to catapult infected bodies over the city walls.

SOURCE 3 Merchants and soldiers returning from Caffa in late 1347 soon spread the Black Death to the Middle East, North Africa and Italy.



How important was Caffa in the spread of the Black Death?

Trade links between Asia and Europe were developing so strongly during the fourteenth century that Caffa was probably not the only source of the Black Death coming to Europe. The city of Messina in Sicily first recorded the plague shortly before the siege of Caffa. Nevertheless, the rapid spread to places that engaged in trade with Caffa suggests that it was important in hastening the disease into Europe, the Middle East and North Africa. During the last few months of 1347, the disease was carried to Constantinople, the southern shores of the Black Sea, Alexandria in Egypt and the islands of Sicily, Corsica and Sardinia in the Mediterranean. Most of this spread appears to have originated in Caffa.

3.14.3 The spread through the Middle East, Europe and North Africa

The Middle East

The plague reached the Middle East through multiple routes:

In 1347, warriors returning to Baghdad from Tabriz in northern Persia brought the disease. Black rats infested their grain supplies and fleas carrying the plague survived on grain debris. The region, including modern-day Iraq, Syria and southern Türkiye, was soon ravaged.

Pilgrims travelling to Mecca from northern India via the Persian Gulf and the Red Sea may have transported rats from Central Asia, spreading the plague to the Arabian Peninsula.

Alexandria, a major trading port with links to Constantinople and Arab cities, was infected in 1347, soon after the siege of Caffa.

The Black Death spread eastwards to Palestine and Syria in 1348, reaching Mecca.

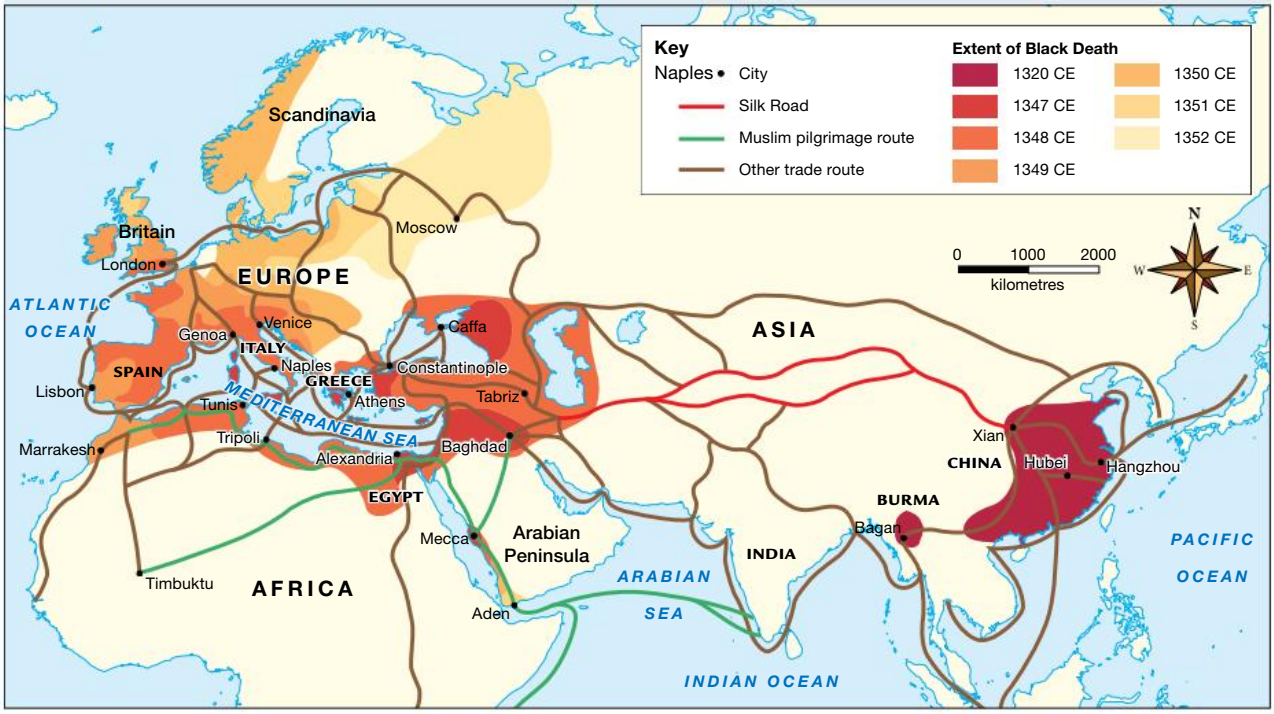
SOURCE 4 From Al-Maqrizi' s account of Alexandria

A ship arrived in Alexandria. Aboard it were thirty-two merchants and a total of three hundred people — among them traders and slaves. Nearly all of them had died. There was no one alive on the ship, save four of the traders, one slave, and about forty sailors. These [forty-five] survivors soon died in Alexandria.

Europe

By January 1348, cases of the plague were reported in both Genoa and Venice in northern Italy. From there it quickly spread to the rest of Italy, and to southern France and Spain by the middle of that year. Within a year all of western Europe was affected and, by 1350, the Black Death had turned east again and had reached Russia. **SOURCE 5** shows how quickly the Black Death spread throughout Europe between 1348 and 1351.

SOURCE 5 The Black Death spread like a wave across Europe between 1348 and 1351.



Source: Map drawn by Spatial Vision.

SkillBuilder discussion

Using historical sources

1. According to the text, how did the rich and poor people in Scotland experience the plague differently? Support your answer with evidence from the extract at SOURCE 6.
2. The author describes how sons wouldn't visit their dying parents. What does this tell us about how the plague affected family relationships?
3. In the extract, Fordun writes that this was the worst plague 'from the beginning of the world even unto modern times'. What words and descriptions does he use to show how serious and unusual this disease was?

SOURCE 6 Fordun's *Chronicle of the Scottish Nation* — Pestilence among men

In the year 1350, there was, in the kingdom of Scotland, so great a pestilence and plague among men (which also prevailed for a great many years before and after, in divers parts of the world — nay, all over the whole earth), as, from the beginning of the world even unto modern times, had never been heard of by man, nor is found in books, for the enlightenment of those who come after. For, to such a pitch did that plague wreck its cruel spite, that nearly a third of mankind were thereby made to pay the debt of nature. Moreover, by God's will, this evil led to a strange and unwonted kind of death, insomuch that 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 meaner sort and common people; — seldom the magnates. Men shrank from it so much that, through fear of contagion, sons, fleeing as from the face of leprosy or from an adder, durst not go and see their parents in the throes of death.

Did you know?

Some historians believe that fleas carrying the Black Death came to Caffa on the skins of marmots. These small Central Asian mammals had no resistance to the disease, and large numbers became infected and died in the mid-1340s. Fur traders came across the dead animals, removed their hides (including the deadly fleas) and sent them along the Silk Road to cities such as Caffa.

North Africa

There are several key points in the spread of the plague through North Africa.

- The plague spread from Alexandria along the North African coast, reaching Tripoli (Libya) and Tunis (Tunisia). At around the same time, Tunis was infected through trade with Sicily, with an outbreak reported in April 1348.
- The plague spread east into Libya, from both the east and west.
- In 1348 the Moroccan ruler's attempted and failed conquest of Tunis led to the plague spreading back to Morocco, infecting Algeria.
- The plague reached Marrakesh (central Morocco) in 1349 (although it is possible that Morocco was first infected by traders from Spain via Majorca).
- The plague spread south along the Nile valley but did not reach other parts of Africa.
- The areas most affected were settled areas with towns and agriculture, which supported black rats.
- In contrast, nomadic tribes south of Egypt and in the Sahara did not support rat populations, which prevented spread.

The plague lasted much longer in Egypt and Syria, with outbreaks over nearly 170 years.

Did you know?

The spread of the plague to Scandinavia is believed to have occurred through a trading ship carrying wool from England. The ship was seen floating off the Norwegian coast and the locals rowed out to examine it. They found the crew dead and decided to take the cargo of bales of wool. Little did they know the bales were full of the deadly plague-carrying fleas.

3.14 SkillBuilder activity USING HISTORICAL SOURCES

Some areas of Europe, the Middle East and North Africa were hit harder than others. Use the **World map** template provided in the digital documents section of the Resources panel to chart the impact of the plague on particular regions.

First, plot each of these locations onto the map. You might like to use **SOURCE 1** to help you locate the original sites of some of these cities.

- London (62 000 deaths)
- Paris (80 000 deaths)
- Florence (70 000 deaths)
- Constantinople (no reliable data)
- Cairo (200 000 deaths)
- Alexandria (no reliable data)
- Gaza (no reliable data)
- Tunis (no reliable data)
- Baghdad (no reliable data)
- Damascus (no reliable data)
- Tabriz (300 000 deaths)

1. **Construct** a timeline of when these cities were infected by the Black Death. Some have been mentioned in this lesson, but you might need to do some additional research.
2. **Construct** a colour gradient to show their chronology (for instance, the far left of the timeline might be red and each following event moves through the spectrum of the rainbow).
3. Add these colours to your map to **demonstrate** the movement of the plague across the region.
4. Use the mortality count next to each city in the list and make the point on your map bigger to **demonstrate** the size of the impact.

3.14 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 3, 5	1, 4, 6	7, 8

REMEMBER AND UNDERSTAND

1. **State** which areas of Europe, Asia and the Middle East had become permanent human settlements by the fourteenth century.
2. The Black Death's most deadly form first appeared in the _____ province in China.
3. **Determine** if the following statements are True or False.
   a. The city of Caffa was the source of infection for Europe and North Africa.
   b. The plague lasted far longer in Egypt and Syria than in other affected areas.
   c. The Egyptian city of Alexandria became infected before the siege of Caffa.
4. **Explain** why the Black Death primarily affected settled communities rather than nomadic ones.
5. **State** how the Tartars in **SOURCE 2** spread disease into the city of Caffa.
   A. They released rats into the city.
   B. The army brought it with them when they conquered the city.
   C. They launched infected bodies over the walls.
   D. They traded supplies for their journey which were infected.

ANALYSE AND APPLY

6. a. **Define** the meaning of the word *pandemic*.
   b. **Explain** why it is appropriate to refer to the Black Death as a pandemic.
7. **Identify** which group is thought to have brought the Black Death to China.

EVALUATE AND COMMUNICATE

8. Some historians have suggested that without trade, the Black Death may never have happened. **Explain** whether or not you agree with this statement. **Justify** your opinion using evidence.

Answers and sample responses for this topic are available online.

LESSON 3.15 How did people respond to the Black Death?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** medieval treatments for the Black Death and explain why they were not effective
- **explain** the religious responses to the Black Death in the Middle Ages.

Tune in

In the **SOURCE 1** engraving people are escaping from their village after setting the buildings on fire. The woman on the left appears to be performing the last rites for a plague-infected man.

The world was caught by surprise when COVID-19 began to spread. Why were we so unprepared for this situation if it had happened before?

1. **Discuss why people may have turned to religion in the face of the Black Death.**
2. **Brainstorm the public response to COVID-19. How did people react to this pandemic?**
3. **Compare the reactions in both times. Identify any similarities and differences.**

SOURCE 1 A fourteenth-century English engraving

3.15.1 Medical treatments

SkillBuilder discussion

Using historical sources

1. The writer compares the buboes (swellings) to two different food items. What are they, and why do you think these comparisons would help medieval readers understand what the buboes looked like?
2. List the words that the writer uses to show how painful these symptoms were for victims.
3. Looking at the date when this was written (1349), what does this Welsh account tell us about how far and how quickly the Black Death had spread across Europe after it first arrived in 1347?

The strength and speed of the Black Death pandemic caught everyone in its path off guard. Medical science had no way of dealing with the outbreak and religious beliefs provided no protection against the onslaught.

Medieval doctors had no idea what had caused the Black Death and so they resorted to the traditional methods of treating illness. **Bloodletting** and the use of leeches were tried and failed to cure the disease. Attempts to cut into the buboes to remove the 'bad' blood often did little more than help spread the disease by exposing the doctors to the bacteria living in the blood.

A common belief in Europe was that disease came from **miasma**, or the bad smells that were often found in overcrowded towns. To counter this, doctors often encouraged their patients to sniff posies of fragrant flowers, bundles of herbs or sweet-smelling oils. In some cases, they even suggested that patients should breathe in the smell of human waste in the hope that one bad smell might overcome the more dangerous miasma.

SOURCE 2 A Welsh writer, who died in April 1349, described the buboes that appeared on the bodies of victims.

It is of the form of an apple, like the head of an onion, a small boil that spares no-one. Great is its seething, like a burning cinder, a grievous thing of an ashy colour. It is an ugly eruption that comes with unseemly haste. It is a grievous ornament that breaks out in a rash. The early ornaments of black death.

Doctors themselves began dressing in long hooded robes to protect themselves from infection. They would also wear a face mask that had a long beak-like structure at the front. This beak would contain sweet smelling herbs or oils, designed to filter any evil smells that the doctor might be exposed to.

Some towns resorted to the 'cure of sound'. They would loudly ring the church bells, or fire off cannons, in the hope that the noise would frighten the plague and drive it away. In addition to prayer, spells and charms of all sorts were used in the hope of driving away the evil. These included washing the skin with vinegar and rose water, or applying a mixture of tree resin, white lily roots and dried human excrement to buboes that had been cut open.

SOURCE 3 Doctors attempted to treat the plague by draining the bad blood from the buboes in this fourteenth-century fresco.

Did you know?

One plague prevention method involved the mixing of roasted and ground eggshells with the leaves and petals of marigold flowers, stirring this mixture with treacle into a pot of warmed ale, and drinking it twice a day. A similarly exotic remedy was to place a live hen near the swelling to draw out the disease and then drink a cup of your own urine twice a day.

Some effective treatments

The most successful measures taken to avoid the plague were those that involved forms of quarantine.

In fact, the word *quarantine* comes from the Italian for *forty days* — *quaranta giorni*. In Venice, ships suspected of being infected had to stay on an island next to the city for 40 days to ensure they weren't carrying the disease.

Islamic religious teachings encouraged people to not flee the plague, but to stay where they were to avoid infecting others. However, these methods did not completely stop the disease. For many people, simply fleeing an infected town or village was the best form of protection, although it was usually only the wealthy who could take advantage of this.

In the French city of Avignon, Pope Clement VI sat between two large fires designed to purify the air. The plague bacteria cannot survive intense heat, and fleas also dislike heat, so this method may well have been the most effective.

3.15.2 Religious responses

Followers of all religions saw the Black Death as divine punishment.

- Christians believed they were punished for sins; they turned to prayer and pilgrimages.
- In Mecca (in 1348) Muslims saw the plague as punishment for allowing non-believers into the holy city.

In some places, religious authorities and town councils imposed tight restrictions on people's behaviour in the hope of keeping the plague at bay. In the French city of Tournai, men and women who were living together but not married were ordered to marry or to separate, and gambling, swearing and working on the Sabbath (a day of religious observance) were banned.

SOURCE 4 This image depicts Saint Sebastian interceding for victims of the plague.

SOURCE 5 A mass grave was discovered in Gdansk, Poland, at the former site of a hospital. The sheer number of bodies meant that they could not be buried in the usual style.

Mass deaths and burials

So large was the death toll from the Black Death that all the usual religious rituals associated with death, such as confessing one's sins to a priest before death, could rarely be observed. As many as half the priests died from the plague and many others fled, making the situation worse. In 1348, Pope Clement VI decreed that those who were infected could make their confessions to each other, including to a woman, if no priest was available. Collection of corpses took place every night, with most buried in mass graves on the outskirts of the town. Very rarely was a proper funeral service held for those who had died.

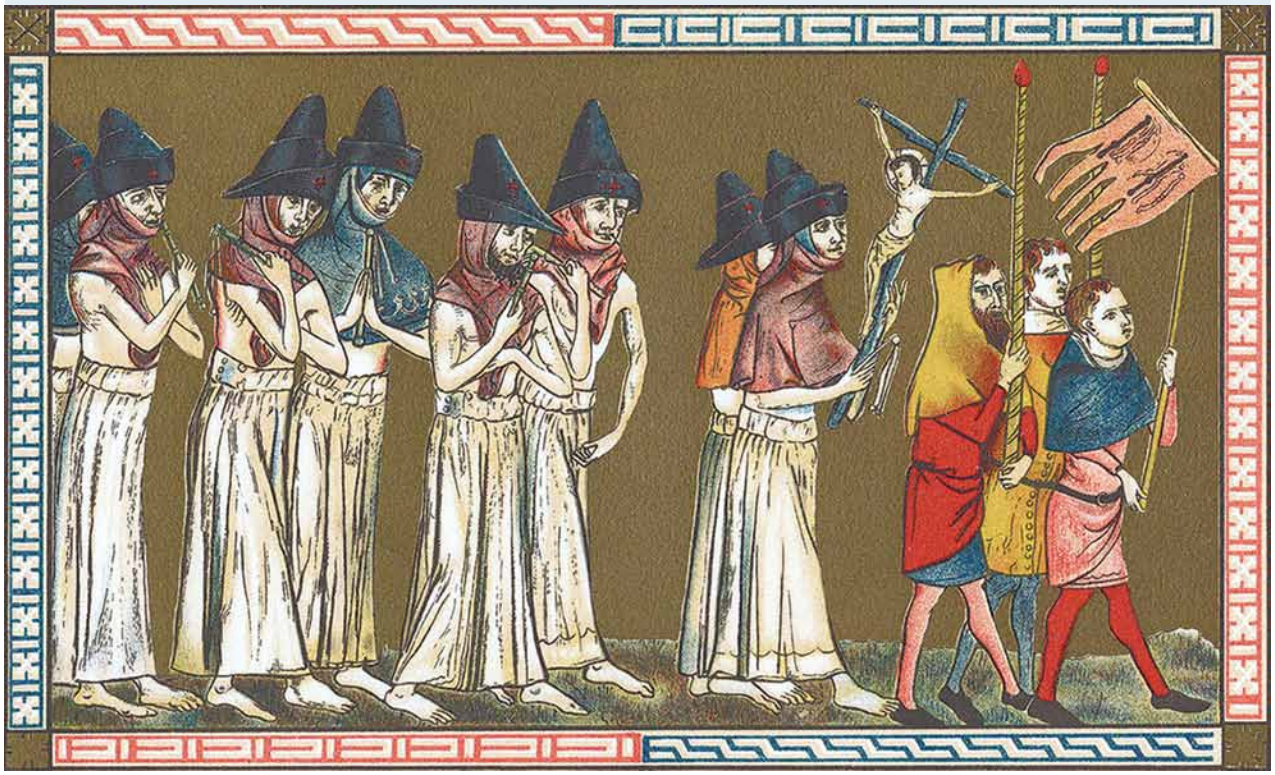
Monks and monasteries

Throughout Catholic Europe, monasteries had become important centres of learning, and many had schools attached. The monks made an important contribution to the life of the surrounding community and were often the first ones that people would turn to in times of trouble. Because the monks saw it as their duty to tend to the sick, they quickly caught the disease and their numbers in the monasteries were reduced. In the period after the Black Death, many inexperienced and poorly trained monks moved into the monasteries, reducing their influence as places of learning.

The Flagellants

One religious group that responded very publicly to the spread of the plague was a group known as the Flagellants. They believed that whipping themselves with steel-tipped whips would show their willingness to be punished for their sins, and win God's favour. The Flagellants are believed to have originated in the eleventh century and had undertaken pilgrimages across Europe in the 1260s. The onset of the Black Death drew many new followers to their group, and they travelled from town to town across Europe, whipping themselves until they bled. In reality, they were probably helping to spread the disease. Many of them carried the disease in their blood, and they often brought the disease-carrying rats and fleas with them as they travelled.

SOURCE 6 A procession of Flagellants in the Netherlands in 1349



SkillBuilder discussion

Using historical sources

1. What specific details in the image show that these people are performing acts of penance? Look carefully at their clothing, actions, and any objects they are carrying.
2. Flagellant processions often attracted large crowds of observers. What different reactions might medieval townspeople have had to seeing this procession pass through their streets?
3. This image was created in the Netherlands in 1349. How reliable do you think it is as evidence of what Flagellant processions actually looked like?

Did Islamic teachings help?

Although Islamic leaders encouraged their people to shelter in place and avoid spreading the plague, there was naturally a great deal of movement as people fled the plague or entered cities to seek new opportunities. There were not as many outward signs of penitence, like the Christian Flagellants, because Muslims were taught that dying of the plague made them a **martyr** and allowed them to immediately ascend to heaven.

Some practices, such as communal prayers, may have only helped to spread the plague quicker. Likewise, caring for the sick in their community was one of the key principles of Islamic faith. Unlike Christian communities who shunned the sick, they were often well-cared for in the Middle East, potentially leading to greater infection but also to a higher chance of recovery.

3.15 SkillBuilder activity HISTORICAL QUESTIONS

Jewish peoples have faced discrimination throughout history. This may have been because they were very focused on maintaining their own community. This led many people to mistrust them and think that if something went wrong it was easier to blame the Jewish people than to actively find a solution.

1. Using the internet and a library, **investigate** the persecution of the Jewish people in medieval Europe, particular during the time of the Black Death. In particular, answer the following:
   a. **Explain** why Jewish people were treated as outsiders.
   b. **List** some examples of restrictions that were placed on Jewish people in different countries.
   c. **Name** at least one other incident when Jewish people were deliberately targeted for persecution.
2. **Construct** a mind-map of ways in which Jewish people were persecuted in the medieval period and who was discriminating against them. You might like to colour-code **Christian** and **Muslim** offenders and compare which of these groups was more tolerant of the Jewish people.

3.15 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 4, 6, 9	2, 3, 5, 10	7, 8

REMEMBER AND UNDERSTAND

1. **Determine** if the following statements are True or False.
   a. People used quarantine to avoid the plague.
   b. Smelling fragrant spices and herbs was used to avoid the plague.
   c. People fled plague-stricken areas to avoid the plague.
   d. The blood from buboes was ingested to avoid contracting the plague.
2. **Identify** and **explain** three 'medical' treatments that were recommended for dealing with the plague.
3. **Explain** the purpose of the costume worn by doctors during the period of the Black Death.
4. _____ sat between two fires designed to _____. This probably kept him safe since _____ dislike heat.
5. Use the information in **SOURCE 2** to **define** your own description of the buboes that were symptoms of the Black Death.

ANALYSE AND APPLY

6. **Examine SOURCE 3**. This action would have been dangerous for the doctor because:
   A. the patient might react violently to being cut.
   B. the doctor might accidentally kill the patient.
   C. the cut could attract more rats, thus spreading more disease.
   D. the infected blood might spread the disease.
7. a. **Infer** what **SOURCE 4** tells us about the importance of religion in medieval life.
   b. **Describe** how religious authorities responded to the threat of the plague.
8. Normally, the Catholic Church allowed only priests to administer the last rites to a dying person. However, during the Black Death they allowed anyone to take final confession. **Evaluate** the effect this might have had on people's thoughts about the clergy.
9. Refer to **SOURCE 6**. **Explain** what the Flagellants were hoping to achieve through their activities.
10. **Describe** how the European and Middle Eastern responses to the Black Death differed.

Answers and sample responses for this topic are available online.

LESSON 3.16 How did the Black Death change society?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** the impacts of the Black Death on Europe in the Middle Ages
- **describe** the ways society changed in the Middle Ages as a result of the Black Death.

Tune in

Disaster has always had an impact on daily life, either from need (people filling in vacant roles, infrastructure change or new social practices) or from a desire from populations to avoid situations such as this again.

SOURCE 1 Ibn Khaldun, who lived through the plague, wrote about the changes that he observed in societies both Christian and Islamic.

> 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. It overtook the dynasties at the time of their senility, when they had reached the limit of their duration. It lessened their power and curtailed their influence. It weakened their authority. Their situation approached the point of annihilation and dissolution. Civilization decreased with the decrease of mankind. 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.

1. **Read SOURCE 1. Identify the ways in which the lives of average people would have been affected.**
2. **This author is a Muslim from Tunisia — would a medieval monk have written in the same way about this crisis? Discuss.**
3. **How does Ibn Khaldun describe the impact of the plague on civilisations in both the East and the West, and what might this suggest about the social and political consequences of the Black Death in medieval times?**

3.16.1 Social changes

Between 1347 and 1351, the Black Death had a brutal effect on life in Europe and the area surrounding the Mediterranean Sea. Despite all the devastation, there were also some positive changes in the following years, many of which occurred as a direct response to the horrors of the plague (see **SOURCE 2**).

Growth of medicine

SkillBuilder discussion

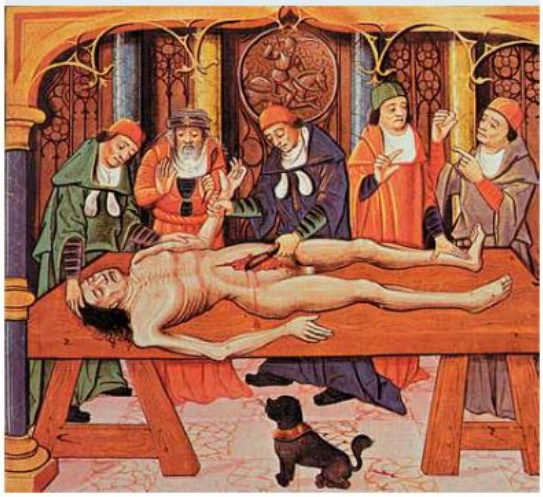
Using historical sources

1. What are the specific details in the image at **SOURCE 2** that give you information about what they are doing here? Look carefully at their clothing, actions, and any objects around them.
2. Prior to this change that allowed human dissections, the Church had banned it for religious reasons. Can you think of reasons that it was previously forbidden?

Sanitation and public health

In a number of places, authorities became more aware of the need to take responsibility for the health of the population. In Italian cities such as Venice and Milan, public health boards were set up to deal with the plague, and these continued after the disease had moved on. These boards gradually gained extra powers and became a valuable means of preventing the spread of illness. In London, the city council brought in regulations to clean up the city. Laws to prevent littering, the employment of street sweepers and heavy fines for dumping waste in the river were all implemented in the years following the Black Death.

SOURCE 2 As shown in this fifteenth-century illustration, the desire of doctors to find out more about the human body led to an increase in dissections, which improved knowledge of human anatomy.



Religion

The devastation of the Black Death weakened the influence of the previously all-powerful Catholic Church. The inability of religious leaders to deal with the plague through prayer and the fact that so many priests had died of the disease led to many people losing some respect for the Church. In the 1360s and 1370s, English **theologian** John Wycliffe wrote a number of works critical of the papacy and of the role of monasteries in society. He gained a strong following among people whose recent experiences had led them to question the power and influence of the Church in society. Many of Wycliffe's followers were executed for heresy.

SOURCE 3 Muhammad ibn Sasra wrote about the changes he noted in his *Chronicle of Damascus*.

Men's occupations have ceased, the hearts of the rulers have become hardened, the rich have become haughty toward beggars, while the subjects perish and misfortunes increase.

Class changes

The huge decline in the numbers of peasants and agricultural workers meant there were fewer people left to perform their tasks. This meant that peasants were able to demand higher wages. However, these demands were often resisted by those in power. Peasants and workers in various parts of Europe rose up to demand their rights in the years following the Black Death. The social and economic elite were extremely worried about the desire of those beneath them to affect change in the social hierarchy, leading to laws such as King Edward III's *Statute of Labourers* in 1350. This essentially prohibited requesting or offering wages higher than those offered before the plague, creating a legal limit to force people to stay in their class.

SOURCE 4 The Jacquerie uprising in 1358 was an attempt by French workers to improve their conditions.

Did you know?

In some parts of Europe, monarchs and aristocrats were alarmed by the growth of the middle class and the increased wealth of some of the peasant class. They passed 'sumptuary laws', which regulated the type of clothing that peasants were allowed to wear. This was to prevent peasants from using their new-found wealth to begin dressing and behaving as if they were members of the upper classes.

In France in 1358, a group of workers called the Jacquerie rose up in revolt to try to improve their working conditions. In 1378 a group of workers in the wool industry, who were known as the *ciompi*, led a revolt in Florence, Italy, where they managed to force some democratic government reforms for a brief time. In England, causes of the Peasants' Revolt of 1381 can be directly traced to Edward III's attempt to control the poorer population.

Although most rebellions and revolts were put down, the overall trend of change was undeniable. A greater number of people engaged in skilled trades rather than the feudalistic working of allocated land, and people flocked to cities for new opportunities. This brought about the growth of a **middle class** and cemented the end of the feudal system. These things may have occurred without the Black Death's impact simply due to political unrest and the famines preceding it.

Language

In England, before the Black Death, most educated people spoke Latin or French. The death of large numbers of educated monks and other scholars meant that schools had to resort to English as the language of instruction. By the 1380s, poets such as Geoffrey Chaucer were publishing their works in what is now referred to as Middle English. Chaucer is considered by many to be the father of English literature.

3.16 SkillBuilder activity **HISTORICAL QUESTIONS**

The Black Death spread quickly through Medieval Europe and infected 30–60 per cent of the population.

1. **Discuss** the following with others:
   - Do you think that the Black Death would have as great an impact today as it did in medieval times?
   - How could people of the time have protected themselves better? Consider their understanding of disease and the resources available to them.
2. **Write** a brief summary of how the world is better prepared now to combat disease and infection.

3.16 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
3, 4, 5	1, 2, 7, 8	6, 9, 10

REMEMBER AND UNDERSTAND

1. **Explain** how the experience of the Black Death changed the ways in which hospitals operated.
2. **Describe** an example of an action taken in London to improve sanitation and public health after the plague had moved on.
3. Many people began to lose respect for the Church after the Black Death because:
   - **A.** they thought priests had caused the Black Death.
   - **B.** the *ciompi* suggested that the church was doing a bad job.
   - **C.** language began to evolve.
   - **D.** the Church couldn't do anything to stop the plague.

4. Before the Black Death, the two languages used by scholars and educated monks in England were _____ and _____.
5. **Identify** the result of the decline in the number of peasant and agricultural workers following the Black Death.
   A. There weren't enough farmers to grow food.
   B. Knowledge of farming was lost.
   C. The Peasants' Revolt of 1381.
   D. The growth of the middle class.
6. **Determine** how the decline in the number of peasant and agricultural workers after the Black Death gave them the strength to challenge those in power.

ANALYSE AND APPLY

7. a. **Describe** what is happening in **SOURCE 2**.
   b. **Identify** the differences in the way the activity in **SOURCE 2** is depicted compared with how it would be performed today.
8. a. **Describe** what appears to be happening in **SOURCE 4**.
   b. **Explain** why this event took place.
   c. **Recall** any places where similar uprisings took place.
9. a. **Explain** what we mean when we refer to a 'middle class' in medieval society.
   b. **State** four examples of occupations that you think would have been carried out by middle class people during the Late Middle Ages.
10. The *ciompi* in Italy managed to gain some 'democratic' reforms in the government of their city. **Identify** an example of what you think might be a 'democratic' reform.

Answers and sample responses for this topic are available online.

LESSON 3.17 Inquiry: How does an event impact different societies?

LEARNING INTENTION

By the end of this lesson you should be able to **compare** the effects of the Black Death on two different societies and use historical sources to build an effective discussion of the past.

Background

The Black Death was a plague pandemic that affected Asia, Europe and North Africa in the fourteenth century. The disease infected almost everyone who came into contact with it and resulted in a huge death toll and social, cultural and economic upheaval. During this period, the East and West were directly connected by not just trade, but also pilgrimage and conflict.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching

In order to truly understand how different cultures approached containing and managing the Black Death, you need to have a grounded place to examine. Use the list below or pick from the **SOURCE 3** map in lesson 3.16 to find two cities which, when compared, will give you an idea of how the local population reacted.

West	East or Near East
London	Constantinople
Florence	Cairo
Paris	Alexandria

Step 2: Using historical sources

Use the information in this topic and do some additional **research**. What was the reaction to the plague in the cities or their surrounding regions? Did religion play a part? Did locals listen to the guidance of their leaders?

Primary sources are a great way to get an insight, but secondary sources have normally brought together all the information you'll need into one place. Try to get a mixture of both.

Step 3: Historical perspectives and interpretations

Compare the reactions to the Black Death in one city to another in a visual way. This could mean

- a Venn diagram
- a mind-map
- comparative population/death toll graphs.

Step 4: Communicating

Create a response to the topic, *Which culture or region responded the most effectively to the Black Death crisis?*

This could be tackled in several ways:

- write a short response exploring your opinion
- create a comprehensive infographic showing the different approaches
- record a vlog discussing the positives and negatives of each approach.

Whatever mode you choose to apply to this task, you must use your research and the historical sources you have gathered to support your contention.

Complete your self-assessment using the **Inquiry rubric** or access the 3.17 exercise set to complete it online.

LESSON 3.18 Review

3.18.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

3.2 How do we know about medieval Europe?

- Much of what we know about medieval Europe is from different types of evidence that provide us with information.
- Sources from medieval Europe include artwork, written sources and artefacts, monuments and buildings.

3.3 What are the key features of the feudal system?

- Feudalism, a method of ordering society, was expanded and developed over the period that Charlemagne ruled in Europe.
- The system was based on the monarch giving land to the wealthier nobles and lords in return for their loyalty and taxes.
- With the land, the nobles and lords gained power over the peasants who lived and worked there, which gave them an income.
- Below the nobles were the knights, who were their sub-tenants. In return for land, they gave loyalty to the lord, fought for him and paid tax they earned from their peasants.
- The feudal system was an effective way to maintain social order.
- Towards the end of the Middle Ages things began to change in relation to the feudal system, as the towns and cities grew.

3.4 How was life for people in the feudal system?

- Quality of life in the Middle Ages depended largely on what position a person held in the feudal system. The nobility, knights and barons all lived reasonably comfortable lives with privileges. The clergy generally led simple and scholarly lives. Peasants, though, had few rights and life was very hard.
- Men did all the farm work, which was mainly physical labour.
- Most peasants had no formal education.
- Women, even those of higher classes, had few rights. Their purpose was to provide children. Most peasant women also did farm labour work such as food preparation, looking after livestock and weaving.
- Children were also regarded as sources of labour as soon as they were old enough to help.

3.5 What were the defence features of the medieval castle?

- In medieval times, castles were built to protect the monarch's or lord's lands, as well as for them to live in.
- Early castles were of motte-and-bailey design: a keep built on a high mound, surrounded by a ditch or moat. The high position gave the people in the keep the advantage when they were being attacked.
- During the Middle Ages castle designs became more and more sophisticated, with heavy concentric walls, battlements and drawbridges.
- Within the castle there were troop quarters, stables, armouries, living quarters, kitchens and dining halls.
- By the end of the Middle Ages, feudalism was declining, castles were no longer effective as a show of strength, and weaponry had developed, so that older weapons no longer stood up to an attacking army.

3.6 How was warfare conducted in the Middle Ages?

- Medieval warfare was a clash of arms for power and wealth.
- Armies would fight hand-to-hand in tightly grouped formation, using weapons such as swords, pikes, axes and maces.
- Archers with crossbows and longbows would also be used and mounted knights would try to break up the enemy's formations.
- Missiles were used to try to break the walls of a town or castle, with trebuchets and early cannons hurling rocks and other materials at the enemy.
- Two important developments in the Middle Ages that allowed for the appearance of the mounted warrior (knight) in battle were the stirrup and a heavier breed of horse that could carry a man in full armour.
- Knights tended to be wealthy, because it was expensive to breed warhorses and own good armour.
- Over the few hundred years that knighthood was at its peak, the armour developed from chain mail to whole suits of armour. Weapons were heavy iron swords, maces, battle axes and lances.

3.7 How were people punished for committing crimes in medieval times?

- As there was no police force to protect communities in medieval Europe, most people had to take on that responsibility for their communities. In order to dispense justice, lords relied on volunteer constables and watchmen.
- An accusation of disturbing the peace was a serious crime in medieval times. Punishments usually took the form of being out in stocks or the pillory. Villagers or townsfolk would be encouraged to shame the offender.
- Trials by jury were commonplace and all villagers had to attend several times a year. The lord's steward oversaw the court and 12 village men made up the jury. The jury would decide upon the fate of the accused.
- The Church was the most powerful institution in medieval Europe and had considerable control over the population. Serious crimes, such as blasphemy and heresy, were punished swiftly by the Church.
- Treason was an especially serious crime in medieval Europe. Plotting against the monarch, conspiring with foreigners and leading a rebellion are some key examples of treason. To maintain power, monarchs had to punish their enemies, as well as warn potential enemies against treasonous acts. Punishments were severe, yet the public was encouraged to attend the executions.

3.8 What was the power and authority of the Church in medieval times?

- The Roman Catholic Church was the one common institution found across western Europe and everyone was expected to live by Church law and keep its rituals and customs.
- As God's representative on Earth, the Pope was a very powerful figure who ruled with the upper class of clergy: cardinals, archbishops and bishops.
- The lower clergy took the Pope's messages to the people in the villages through their sermons.
- Every village had a parish church built with peasant labour, which was the centre of their community. The more powerful churches, the seats of the bishops, were called cathedrals.
- By early medieval times, communities of religious men (monks) were living in monasteries. These religious men devoted their lives to God and played important roles in the local communities, such as running schools and hospitals.

3.9 What was the power of the written word?

- Parish priests, monks, nuns and friars played an important role in spreading Christianity to even the most remote village.
- Monks lived in small closed communities called monasteries and nuns lived in similar communities called convents.
- The religious orders such as monks produced the written texts by hand in a very labour-intensive process.

- Manuscripts were produced by hand. They were made from vellum and written on with quills.
- Illuminations are the elaborate illustrations that accompanied the manuscripts.

3.10 Inquiry: Was King Arthur real?

- The myth of King Arthur has been popular for centuries.
- Many people were convinced that he was a real Saxon king in early medieval times.
- Twenty-first century historians generally agree that the evidence points to King Arthur being a myth, not a historical figure.

3.11 Inquiry: The *Magna Carta*

- The *Magna Carta* is a royal charter of rights that was signed by King John of England and his barons in 1215.
- It was designed to bring peace between King John and his barons by ensuring that the monarchs of England were bound by the law and could not just make their own laws.
- It had a significant impact on a number of different groups in society.

3.12 What were the changing relations between Islam, Christianity and Judaism in the Middle Ages?

- Many people during the Middle Ages were illiterate and therefore relied on priests for education and guidance.
- In Medieval Europe, medicine took second place to religion. Priests were considered more important than doctors.
- Most people believed that prayer was the most effective way of dealing with serious illness.

3.13 What was the Black Death?

- The Black Death was a disease that devastated Europe, Asia and North Africa during the fourteenth century, particularly between 1347 and 1351.
- The Black Death was a combination of three related diseases — bubonic plague, pulmonary/pneumonic plague and septicaemic plague.
- A bacterium known by the scientific name of *Yersinia pestis* was the cause of the Black Death. These bacteria were transmitted by a number of different types of flea found living on the bodies of black rats.

3.14 How did the disease spread?

- The growth of trade played an important part in the spread of disease. The Black Death was more easily able to spread between settlements along trade routes such as the Silk Road.
- It is believed that the Black Death first appeared in its deadly form in China and that it was carried there by the Mongols.
- The potential was always there for the Black Death to be carried to Europe, either by European traders returning from the east or by the Central Asian Tartar warriors (Mongols), who were continuing their attacks in eastern Europe.

3.15 How did people respond to the Black Death?

- Medieval doctors had no idea what had caused the Black Death and they resorted to the traditional, unsuccessful methods of treating illness.
- Some people believed that the disease came from miasma (unpleasant smells or fumes), while others saw it as a punishment from God.

3.16 How did the Black Death change society?

- Following the Black Death and the failure of medieval medicine to treat the sick, there was a greater focus on medical research. An increased emphasis on medical knowledge led to more dissections of human corpses and improvements in surgical practices.

- The Black Death weakened the Catholic Church — many people lost faith and respect after so many people, including priests, had died from the plague.
- The death of so many educated monks and scholars meant that schools had to teach in English rather than Latin or French.

3.17 Inquiry: How does an event impact different societies?

- Different societies reacted to the Black Death in different ways.
- When researching a topic, a mix of primary and secondary sources is ideal.

3.18.2 Key terms

archbishop head bishop
artillery large mounted firearms such as the cannon
bishop clergyman who governs a diocese, a large church district
blasphemy any words or actions that were considered disrespectful or insulting towards God or religion. This included things like cursing, speaking rudely about religious figures or religion, or denying the existence of God. It was considered a serious crime and was punished by fines, imprisonment, or even death.
bloodletting medieval medical practice where blood was deliberately removed using cuts or leeches; commonly used during plagues though it was often harmful
bubonic plague the commonest form of plague in humans, characterised by fever, delirium, and the formation of buboes
cardinal leading clergyman who is a member of the Pope's Council, or Sacred College, and who has the power to elect the Pope from among his own group
cathedral main church of a diocese; contains the bishop's throne
chronicle a record of events as they happened, usually written by a person who was present at the time they occurred
city-state a city that with its surrounding territory forms an independent state
clergy officials of the Church
concentric having a common centre
curtain wall outer wall surrounding an inner wall in a castle
dormant inactive or sleeping, with the potential to become active at any time
duke in England, a lord whose status placed him just below that of a prince; elsewhere in Europe, a ruler of a small state called a duchy or dukedom
endemic normally and regularly found in a particular location or environment
fallow when a field was left for a period without being sown in order to restore its fertility through the nutrients in the soil
feudalism social order in medieval Europe
Franks people of a group of a Germanic nation who ruled in western Europe from the sixth century CE
geld a form of land tax
heresy opinion that challenged or differed from that of the Roman Catholic Church or the less tolerant Protestant churches
heretic one who rejects the teachings of the Church
illumination hand-painted illustration in a medieval book
keep innermost tower of a castle
lance a long wooden shaft with a steel point used as a weapon by mounted knights
lords feudal term for aristocracy of big landowners
lymph node lump of tissue that helps the body fight infection; part of the immune system
mace iron-headed club
martyr someone who dies for their faith or is recognised by their religion in death
mass Roman Catholic Church service
miasma unpleasant smells or fumes thought to be the cause of disease in medieval times
middle class a social class between the privileged nobility and the poor peasants. It typically comprised merchants and wealthier craftspeople.
moat water-filled defensive ditch surrounding a castle
motte a mound upon which a castle was built
Normandy now a French province, in the Middle Ages it was a dukedom in northern France

nun member of a closed community of women living under religious vows and rules
palisade tall fence made of pointed timber stakes driven into the ground
pandemic widespread across a large region
persecution oppression or punishment of a person or group of people, usually because of their religion
phalanx body of foot soldiers in close battle order
pike long spear-like weapon carried by foot soldiers
pneumonic plague a severe lung infection caused by the bacterium *Yersinia pestis*
reeve a magistrate administering law in a village
regurgitate to vomit, or bring up the contents of the stomach or throat
sacrament a sacred Christian ceremony, for example, baptism or marriage
sanctuary protection offered to individuals who were seeking refuge from persecution or punishment. The right of sanctuary was based on the idea that churches and other religious institutions were sacred and provided a safe place for those in need of protection. They were granted temporary protection from arrest, allowing them time to negotiate a settlement for their crime, or seek a pardon.
septicaemic plague a plague wherein bacteria multiply in the blood
sermon moral or religious lecture delivered by a priest
stirrup foot supports suspended from a saddle by straps
thatch straw used for making roofs
theologian a person who is considered to be an expert in religious matters
vernacular everyday language spoken by a particular group or class

3.18.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry questions posed in the Overview:

What were the significant social, cultural, economic, environmental and political features of life in Medieval Europe?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

learnon

Post-test	Online post-test
eWorkbook	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary
Video eLesson	Medieval Europe

3.18 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4, 7, 11	3, 5, 9, 10, 12, 14	6, 8, 13, 15

REMEMBER AND UNDERSTAND

1. Which of the following was not a weapon used by knights?
   A. Mace
   B. Lance
   C. Cannon
   D. Sword
2. Which of the Roman Catholic clergy was the most powerful?
   A. Cardinal
   B. Priest
   C. Bishop
   D. Monk
3. The main work of early Christian missionaries was to:
   A. persecute non-Christians
   B. spread the word of Christianity
   C. eliminate the snakes in Ireland
   D. travel across Europe to primitive tribes.
4. Where did the plague most likely originate?
   A. Australia
   B. Asia
   C. Europe
   D. Africa
5. The word 'quarantine' comes from which Italian phrase?
   A. Separated patients
   B. Forty days
   C. God's will
   D. It wasn't an Italian phrase — it originated in Spain
6. What is the name of the bacterium considered responsible for the Black Death pandemic?
   A. *Yersinia pestis*
   B. *Bacillus anthracis*
   C. *Bacterium yersinius*
   D. None of the above
7. What is an illumination?
   A. A light in the altar of a church
   B. An illustration in a holy manuscript
   C. A new idea
   D. A stained-glass window
8. Which of the following was not a social group in the feudal system in medieval Europe?
   A. Clergy
   B. Lords
   C. Peasants
   D. Pagans
9. Which of the following statements *does not* describe why historians once called the medieval period 'the Dark Ages'?
   A. They believed that ignorance triumphed over learning and order.
   B. There was a long period of coldness and darkness, causing famine.
   C. It was a period of great instability.
   D. Many Roman architectural structures were destroyed or abandoned.

10. Which of the following was not a defence feature of a medieval castle?
    A. Brewery
    B. Moat
    C. Palisades
    D. Bailey

ANALYSE AND APPLY

11. **Explain** the main reason for the spread of the Black Death.
12. **Describe** the main social groups in the feudal system.
13. **Discuss** the importance of the peasant class in supporting the feudal system.
14. a. **State** the purpose of castles.
    b. **Identify** at least two defence features of castles and **explain** how they worked against enemies.
15. Using at least two examples, **describe** the power of the Church in medieval Europe.

Answers and sample responses for this topic are available online.

4 The Ottoman Empire

LESSON SEQUENCE

online only

4.1 Overview
4.2 Leadership and power in the Ottoman Empire
4.3 How did the Ottoman Empire expand?
4.4 What caused the fall of Constantinople?
4.5 Who was Suleiman the Magnificent?
4.6 What was life like in the Ottoman Empire?
4.7 What was the Ottoman contribution to art, architecture and literature?
4.8 Inquiry: What were the significant legacies of the Ottoman Empire?
4.9 Review

LESSON 4.1 Overview

INQUIRY QUESTION

How did the Ottoman Empire become one of history's most powerful and diverse societies?

Imagine walking through a bustling marketplace where traders from Europe and Asia haggle over spices and silks, while nearby a group discusses poetry in a coffee house, and people of different faiths worship freely in churches, synagogues and mosques. This was daily life in the Ottoman Empire, one of the world's most diverse and influential civilisations.

learnon

- **Pre-test**
  Online pre-test
- **eWorkbook**
  Customisable worksheets for this topic (ewbk-14236)
- **Digital document**
  Key terms glossary (doc-43118)
- **Video eLesson**
  The Ottoman Empire (c. 790–1066) (eles-1825)

610
Mohammed experiences visions and begins Qur'an (sacred text of Islam).

7th century
Expansion of Islam across the Middle East and Africa

8th century
Early Islamic Empire at its peak; beginning of the 'golden age of Islam'

BCE 500 600 700 800 900 1000 1100

570
Birth of Mohammed

632
Death of Mohammed

711
Islamic forces conquer Spain.

717
Advancing Islamic forces defeated at Constantinople

732
Islamic forces defeat France at the Battle of Tours.

SkillBuilder

Use the SkillBuilder activities to develop these Historical concepts and skills:

- HISTORICAL QUESTIONS
- CHRONOLOGY
- USING HISTORICAL SOURCES
- CONTINUITY AND CHANGE
- CAUSES AND CONSEQUENCES
- HISTORICAL SIGNIFICANCE
- COMMUNICATING

1298
Osman I founds the Ottoman Empire.

1459
Construction of the Topkapı Palace begins.

1529
Advancing Ottoman forces defeated at Vienna

1200 | 1300 | 1400 | 1500 | 1600 | 1700 CE

1402
The Ottomans are defeated by the Mongols.

1452–53
Sultan Mehmet II of the Ottoman Empire captures Constantinople.

1683
Ottoman forces again defeated in Vienna. This is seen by many as the beginning of the decline of the Ottoman Empire.

LESSON 4.2 Leadership and power in the Ottoman Empire

LEARNING INTENTION

By the end of this lesson you should be able to **identify** how Ottoman rulers governed their diverse empire and explain why these strategies were successful.

Tune in

Ottoman tax records were written in multiple languages, including Turkish, Arabic, Greek and Armenian. Work in pairs to answer the following questions:

1. **Why would an empire need documents in different languages?**
2. **What challenges might rulers face governing people who speak different languages?**
3. **How could keeping detailed tax records help control a large empire?**

DID YOU KNOW?

Ottoman officials had to learn multiple languages to govern effectively. Many important documents were written in three or four different languages to ensure everyone could understand them.

4.2.1 Governing a diverse empire

The Ottoman Empire faced a unique challenge: how to rule over millions of people with different cultures, religions and languages, while maintaining peace and collecting taxes. The Sultans developed a sophisticated system of government that balanced central control with local freedoms.

The Sultan's power

At the top of this system sat the Sultan, who held both political and religious authority. He was not just a political ruler but also the caliph, the protector of Islam and guardian of its holy cities. However, even with this immense power, the Sultan needed help to govern his vast territories.

The Sultan governed through his Imperial Council (Divan), which met regularly in the Topkapı Palace. This council included:

- the grand vizier — a prime minister–style official, who ran the day-to-day government
- military commanders who managed the army
- religious leaders who advised on Islamic law
- financial officials who oversaw tax collection
- provincial governors who reported on local issues.

SkillBuilder discussion

Historical questions

1. How did the meeting room's design and decoration reflect the power and authority of the Ottoman Sultan and his Imperial Council?
2. In what ways might the presence of tourists in the modern photograph influence our perception of the historical significance of the Imperial Council meeting room?
3. How might the layout of the Imperial Council meeting room have aided governance and decision-making in the Ottoman Empire?

SOURCE 1 The Imperial Council meeting room in Topkapı Palace

Managing the provinces

The empire was divided into provinces called *eyalets*, each governed by a provincial ruler appointed by the Sultan. These governors were given significant freedom in return for maintaining order, collecting taxes, providing soldiers when needed, and applying Ottoman law. *Eyalets* were also allowed to keep practising local religions and customs.

4.2.2 The millet system

One of the most remarkable features of Ottoman rule was the empire's method of governing people of different faiths. Rather than forcing everyone to follow Islam, the Ottomans developed the *millet* system — a way to give people religious freedom.

Each major religious group in the empire was organised into a *millet* (nation) with considerable **autonomy**. The largest was the Muslim *millet*, followed by the Greek Orthodox, Armenian Christian and Jewish *millets*. Each community could follow its own religious laws, run its own schools, and handle matters like marriage through its own courts. Religious leaders acted as both spiritual guides and community administrators, responsible for maintaining order and collecting certain taxes from their people.

This system helped keep peace between different religious groups and made the vast empire easier to govern. Local communities could maintain their traditions while still being part of the larger Ottoman state. It also provided the empire with steady tax revenue, as non-Muslims paid a special tax called the *jizya* in exchange for protection and religious freedom.

The *millet* system also had its limitations. While religious minorities enjoyed significant freedoms, they faced certain restrictions. Non-Muslims paid higher taxes than Muslims and couldn't serve in the highest government positions. Having different legal systems operating also led to conflicts when disputes arose between members of different *millets*.

SOURCE 2 Ottoman Sultan Mehmet II and the Greek Orthodox Patriarch Gennadios II

4.2.3 Law and order

The Ottoman Empire maintained order through both its legal system and military power. Ottoman courts combined Islamic law (sharia) with the Sultan's own laws (*kanun*). Judges called cadis heard cases in courts that were open to all subjects — Muslim and non-Muslim alike.

SkillBuilder discussion

Using historical sources

1. What does *Abu Zayd pleads before the Qadi of Ma'arra* tell us about cadis in the Ottoman legal system?
2. How does Abu Zayd's portrayal reflect fourteenth-century Ottoman social and legal practices?
3. How do the Ottoman legal proceedings compare with modern court systems?

SOURCE 3 *Abu Zayd pleads before the Qadi of Ma'arra* (1334), unknown painter, Maqamat al-Hariri, Austrian National Library.
A cadi hears a case in an Ottoman court.

The empire's military strength came from its professional army, particularly the elite Janissary corps. Unlike other armies that relied on seasonal farmers or mercenaries, the Janissaries were full-time soldiers trained from childhood. The Ottomans were also known for their military technology, especially their use of cannons and innovative siege warfare tactics.

4.3 SkillBuilder activity COMMUNICATING

Imagine you are a new Ottoman governor in charge of a province that includes:

- three different religious groups
- people speaking four different languages
- both farmers and nomadic herders
- rich coastal cities and poor mountain villages.

Your task:

Construct a plan to govern this province successfully. **Discuss** how you will:

- collect taxes fairly
- keep peace between different groups
- protect trade routes
- deal with local disputes.

Outline three new laws that would help solve specific problems in your province.

Share your plan with a partner and **discuss**:

- what problems might arise
- how you could solve them
- what you could learn from Ottoman methods of governing.

Extension: Present your plan to the class as if you were reporting to the Sultan's Imperial Council.

4.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 5, 9	2, 4, 6, 8	7, 10

REMEMBER AND UNDERSTAND

1. **State** what was the Imperial Council.
2. **Explain** what the *millet* system was used for.
3. **List** three main religious groups in the Ottoman Empire.
4. **Describe** how Ottoman judges (cadis) maintained justice.

ANALYSE AND APPLY

5. **Describe** how the *millet* system helped maintain peace in the empire.
6. **Explain** what advantages the Janissaries had over other armies of their time.
7. **Explain** why non-Muslims might have chosen to use Ottoman courts.

EVALUATE AND COMMUNICATE

8. **Identify** what evidence suggests the Ottomans were skilled at managing diversity.
9. 'The Ottoman Empire was successful because it balanced control with freedom.' **State** whether you agree.
10. **Compare** Ottoman methods of controlling the empire with another empire you have studied.

Answers and sample responses for this topic are available online.

LESSON 4.3 How did the Ottoman Empire expand?

LEARNING INTENTION

By the end of this lesson you should be able to track the early expansion of the Ottoman Empire and **examine** the key achievements of early rulers.

Tune in

Empires have appeared in many forms throughout history. The empires we see in the modern world differ significantly to those that existed in the past. However, the reach and power of modern empires is stronger than that of their historical counterparts.

1. **Can you think of a modern example of an empire? (*Hint:* Try not to think of empires in terms of one country controlling other countries; instead, think of different ways you may see 'empires' in modern society). List as many examples as you can.**
2. **Do you believe we will ever return to the age of empires? Discuss your responses as a class or with a partner.**

SOURCE 1 Do you think we have any modern empires?

4.3.1 The battle for power in the Middle East

About 1200 CE, the Middle East was made up of a series of states competing for dominance. The major powers Persia and Byzantium were being affected by a variety of new forces. To understand the success of the Ottomans in dominating this area, it is important to look at both of these older powers, as well as some of the forces that helped to destabilise the region.

In the fourth century, the Roman Empire was divided in half and Constantinople became the capital of the Eastern Roman Empire. This empire was known as the Byzantine Empire (from Byzantium, the old name for Constantinople). Based in modern-day Iran, the Persian Empire had existed in various forms for over a thousand years. A series of wars between these two empires significantly weakened both of their armies and left them vulnerable to outside forces.

The situation in the region was changing, driven by a number of factors. The spread of Islam and its impact on the Middle East has already been examined. Other factors included:

- *Venetians*. Venice is an island city in the north-east of Italy. A flourishing trade was developing between western Europe and China and India in the east. Due to the city's importance on this trade route, Venice found itself under constant threat of foreign invasion.
- *Crusaders*. The Crusades were a series of wars initiated by the European Christian Church, which wanted to reclaim the Holy Land that was under Islamic rule. To start the First Crusade, Pope Urban II called for support by citing violent acts committed by some Muslim groups. Soldiers in France and Germany responded to Pope Urban's call and left Europe to help defend Constantinople and reclaim other territories. As well as fighting to take the Holy Land from the Muslims, the Crusaders took the opportunity to attack Jews and Orthodox Christians.

SOURCE 2 A map of major trade routes in the Middle East around 1200 CE

Source: Map drawn by Spatial Vision.

SkillBuilder discussion

Historical significance

1. In groups or pairs identify the major trade routes in the Middle East around 1200 CE.
2. Discuss how the major trade routes in the Middle East around 1200 CE influenced the economic and political power of the emerging Ottoman Empire.
3. Control over the trade routes was fiercely fought for. Why do you think this was?

4.3.2 The expansion begins

The Ottoman Empire was established by the Seljuk Turk Osman I, who ruled from 1298 to 1326. The term 'Ottoman' is derived from a European form of his name. Due to the scarcity of primary sources from this period, little is known about Osman I. The available information about Osman's rule comes from secondary sources written several centuries after his death. It is known that Osman I initiated a plan of expansion, recognising the weakening state of the Byzantine Empire. He began his conquests locally, gradually taking control of neighbouring *beyliks* (territories).

Osman I expanded his rule in multiple directions, with his movement into north-west Anatolia (modern-day Türkiye) being particularly significant. At the Siege of Bursa, Osman I captured the city previously controlled by the Byzantines. This marked the first Ottoman victory against a rival empire, and although Osman I died shortly after this event, the siege became a turning point in Ottoman history.

Osman I was succeeded by his son Orhan, who further developed the Ottoman Empire. Orhan focused on improving the organisation of his military and targeted the city of Nicaea for expansion. Initially settled by the Greeks, Nicaea had a notable history and served as a strategic outpost of the Byzantine Empire because it protected a route to Constantinople. Osman I had first laid siege to Nicaea but was unable to capture the city during his reign.

After years of gradual progress, Orhan finally took Nicaea and then the nearby city of Nicomedia, which reinforced the Ottoman presence in north-west Anatolia. Orhan also expanded westward, capturing Karesi and gaining access to the Dardanelles Strait. Following his expansion, Orhan oversaw a period of consolidation, strengthening his military position and planning further conquests.

SOURCE 3 An image of Osman I, the Oghuz Turkish leader who founded the Ottoman Dynasty

Expansion into Europe

The next significant expansion of the Ottoman Empire was achieved by Orhan's successor, Murad I. Using the newly acquired access to the Dardanelles, Murad I was able to bypass Constantinople and launch a campaign into the Balkans. This move was extremely significant from a strategic perspective because it isolated Constantinople from the rest of the Byzantine Empire.

Murad I used a combination of strategies to establish control of this area, including combat, diplomacy and the use of politically motivated marriages. This last technique was particularly useful to gain the loyalty of local communities and rulers. With a strengthened army in the north-west of Anatolia and a new stronghold in Europe, the stage was finally set for the greatest conquest of the Ottoman Empire to this point, the final bastion of the Byzantines: Constantinople.

SOURCE 4 A map of the Ottoman Empire in 1400, showing some of the major battles

Source: Spatial Vision

4.4 SkillBuilder activity HISTORICAL QUESTIONS

1. Select one of the battles mentioned in this lesson and **investigate**, conducting research, to find more information about it.
2. Take notes to answer the following questions.
   a. Who was the battle fought between?
   b. Why was the battle fought?
   c. What tactics were used in the battle?
   d. Why was the victorious side able to win?
   e. What was the significance of this battle?
3. Using your research notes, write a few paragraphs to **describe** the battle in your own words. Your paragraphs can be structured using the questions above.

4.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 6	4, 5, 7	8, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** which two of the following were major powers in the Middle East during the Early Middle Ages.
   A. Armenia
   B. Persia
   C. Byzantium
   D. Arabia
   E. Egypt
2. **Identify** the capital of the Byzantine (Eastern Roman) Empire.
   A. Damascus
   B. Baghdad
   C. Venice
   D. Constantinople
3. The founder of the Ottoman Empire was
   A. Osman I
   B. Osman II
   C. Orhan
   D. Suleiman Pasha.
4. **Explain** how Murad I contributed to the expansion of the Ottoman Empire.
5. There are three Ottoman rulers mentioned in this lesson. **List** these rulers and **describe** at least one of their respective accomplishments.

ANALYSE AND APPLY

6. Using **SOURCE 3**, **name** the two earliest Ottoman capitals and the date each city became the capital.
7. **Construct** a timeline with the following dates and match them with an event examined in this lesson: 1298, 1326, 1354, 1389, 1393.
8. **Examine** the maps shown in **SOURCES 2** and **3**. **Describe** the connection between trade routes and the major battles discussed in this lesson.
9. As the influence of the Ottoman Empire continued to grow, **explain** what happened to the other major powers in this region.

EVALUATE AND COMMUNICATE

10. Several factors that assisted the spread of the Ottoman Empire are listed in this lesson. **Identify** and **explain** these factors with evidence from this lesson.

Answers and sample responses for this topic are available online.

LESSON 4.4 What caused the fall of Constantinople?

LEARNING INTENTION

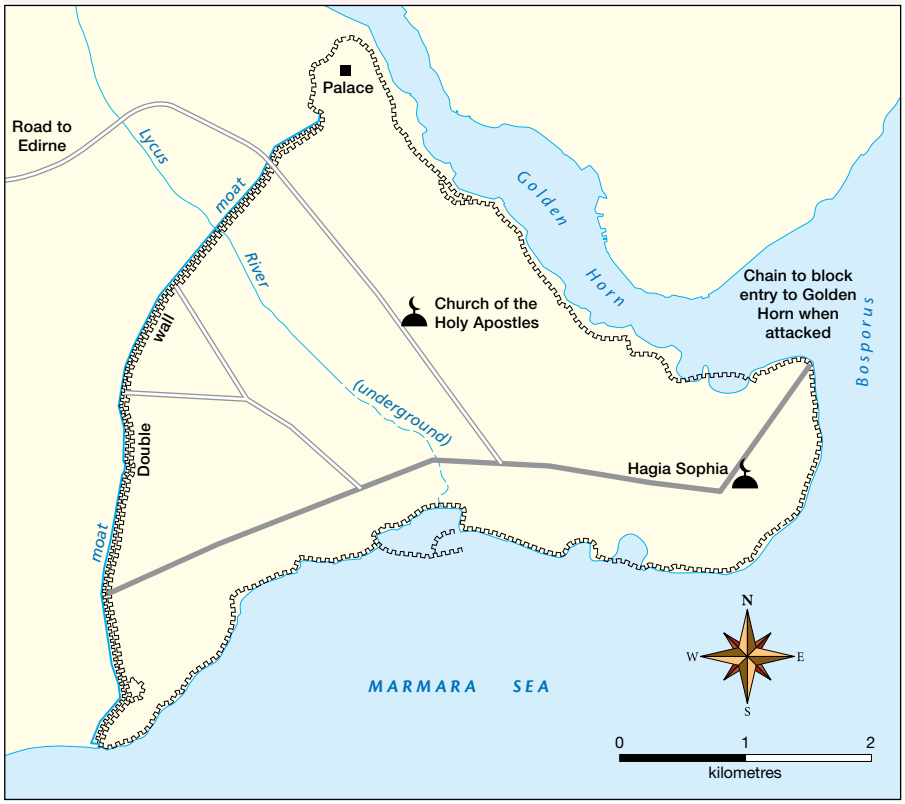
By the end of this lesson you should be able to **describe** the technical and strategic aspects of the Siege of Constantinople.

Tune in

The rulers of Constantinople had built and maintained strong defenses, which were constantly being improved and strengthened. **SOURCE 1** shows the major defenses protecting the city.

Study **SOURCE 1** and imagine you are planning to attack the city. Discuss some initial thoughts about how you might overcome the defenses and consider why they have been placed where they are.

SOURCE 1 A map of Constantinople showing its major defences



Source: Map drawn by Spatial Vision.

4.4.1 Defenses at Constantinople

After a brief period of instability at the beginning of the fifteenth century, the influence and power of the Ottoman Empire continued to spread. By the time **Sultan** Mehmet II gained control in 1444, the Ottomans had occupied much of eastern Europe, including the land around the Byzantine capital of Constantinople. The jewel of the Byzantine Empire, Constantinople had been controlled by the Byzantines for nearly thirteen centuries. The city held strategic importance in the region and was also a symbol of Christianity in eastern Europe. For these reasons, it was a city that Mehmet II simply had to capture.

For more than a thousand years, the rulers of Constantinople had built and maintained strong defenses. The famed Walls of Constantinople were first constructed by Emperor Constantine the Great (see **SOURCE 2**). When rebuilding the city's initial fortifications, Constantine added more complex structures to the city's defences. These included towers at regular intervals and heavily protected gates and passages. Constantine the Great also increased the number, thickness and height of the original walls. On the seaward sides, steep cliffs and sea walls made access difficult. The Golden Horn (the strip of water north of Constantinople) could be closed off in times of attack by a heavy chain running from shore to shore. Subsequent emperors such as Theodosius II made further improvements to the fortifications of Constantinople, including a system of double walls.

SkillBuilder discussion

Historical significance

1. How did the Walls of Constantinople help protect the city from invasions?
2. Why were these Walls considered an important feature of medieval military architecture?
3. What role did the Walls of Constantinople play in the survival of the Byzantine Empire for centuries?

SOURCE 2 The Walls of Constantinople

While the Walls of Constantinople had provided protection for a very long time, their effectiveness was diminished by the Ottoman army's use of cannons.

Gunpowder and the cannon had originated in China and were probably brought to the area by the Mongols. The Ottomans were quick to adopt them in warfare. They used one cannon in November 1452 to sink a Venetian ship sailing along the Bosphorus Strait, but for the attack on Constantinople, a larger cannon was needed and built. It was 8.4 metres long with a wall 20 centimetres thick. It could fire a cannonball of 600 kilograms a distance of 1.6 kilometres.

SOURCE 3 The Dardanelles Gun. This cannon, built in 1464, was cast in bronze and weighed 18.4 tonnes. It was built in two parts that could be screwed together using a large lever as a spanner.

4.4.2 The siege

At the time of the Ottoman conquest, Constantinople was far from the once-great city it had been. Years of tension and hostility between Rome and the Byzantine capital had taken its toll on the city and its people. Constantinople had also never truly recovered from the social and economic impact of the Black Death. These factors left Constantinople vulnerable and the Ottomans planned on taking full advantage of the city's weakened state. Before the siege began, Mehmet II tried to tempt Constantine XI into surrendering. Mehmet offered freedom of religion as well as territory in Greece to the Byzantine Emperor, but the proud Constantine refused, plunging his city into war with the Ottomans.

SOURCE 4 Sultan Mehmet II gives his reasons for attacking Constantinople.

The ghaza [holy war] is our basic duty as it was in the case of our fathers. Constantinople, situated in the middle of our domains, protects our enemies and incites them against us. The conquest of the city is, therefore, essential to the future and the safety of the Ottoman state.

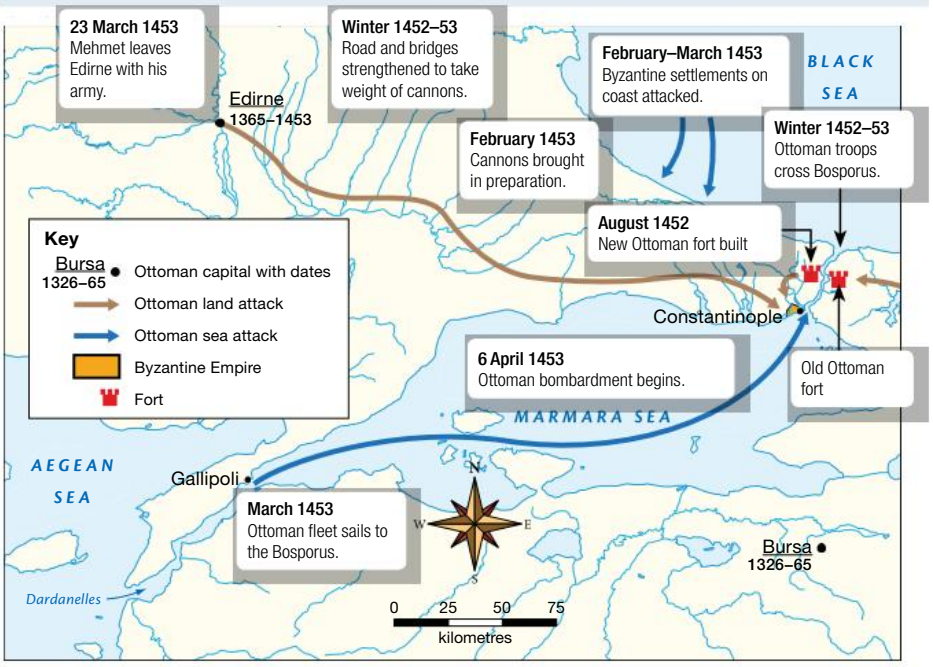
SOURCE 5 Candarli Halil, adviser to the Sultan, warns Constantinople that Sultan Mehmet is more of a danger to them than the previous Sultan.

You stupid Greeks . . . I have known your cunning ways long enough. The late Sultan [Murad] was a tolerant and conscientious friend of yours. The present Sultan Mehmet is not of the same mind. If Constantinople eludes his bold and impetuous grasp it will only be because God continues to overlook your wicked and devious schemes.

During the siege, Mehmet's base was the Ottoman fortress of Rumeli Hisar on the western bank of the Bosphorus Strait. Though hastily constructed, this military centre enabled Mehmet to command his forces from a tactically strong position.

Over the winter of 1452–53, Constantinople prepared for a siege by reinforcing its walls and bringing in extra supplies of food, while Mehmet strengthened the roads between his capital of Edirne and Constantinople so that he could bring in his cannons to attack the walls of Constantinople. Mehmet positioned his naval fleet in both the Black and Marmara seas to isolate the Byzantines within their own city. On the ground, Mehmet used his Janissaries — elite and often brutal soldiers — to attack the walls of Constantinople.

SOURCE 6 Map showing preparations for the attack on Constantinople



Source: Map drawn by Spatial Vision.

Ottoman attacks continued through April and early May, but the defenders of Constantinople held out, despite being outnumbered by ten to one. Towards the end of May, the Ottomans heard rumours that a European relief army was approaching the city and Mehmet decided to launch a final attack.

Cannons were brought closer to the walls and, on the night of 28–29 May, Ottoman ships were brought as close as possible to the sea walls. By early morning on 29 May, the walls had been breached and defences collapsed.

SkillBuilder discussion

Communicating

1. Work in groups or pairs to describe the significance of the cannons during the Ottoman attack on Constantinople. Why were they critical in the final assault?
2. How did the defenders of Constantinople resist the larger Ottoman forces for weeks? What strategies might they have employed?
3. Summarise the sequence of events that led to the fall of Constantinople on the morning of 29 May.

SOURCE 7 *The taking of Constantinopole* by Palma Le Jeune (1544–1620)

DID YOU KNOW?

The city of Constantinople eventually became known as Istanbul. Medieval travellers would sometimes use the phrase 'είς τὴν Πόλιν' [is tin polin], meaning 'into the city'. However, this change didn't come about until the late 1920s.

4.4.3 After the fall of Constantinople

The fall of Constantinople was a significant event in medieval history. Not only does it mark the official end of the Eastern Roman Empire, but some historians see it as the end of the entire medieval period. Losing Constantinople was also a great blow for Christianity in Europe. The greatest symbol of this change was the conversion of the great Hagia Sophia church into a mosque. However, there were also several positive outcomes from the fall of Constantinople.

- *The Age of Exploration.* The Ottomans now controlled the major trade link between Europe and Asia. This forced European powers, including Spain and Portugal, to consider different methods of reaching the Far East. It is thought that the journeys of discovery of the great European explorers may have occurred because of this need.
- *The Renaissance*. The Islamic focus on academic pursuits (especially mathematics and science) is well documented. After the fall of Constantinople, Ottoman traders and scholars began to interact with their European counterparts more frequently. These interactions are thought to have directly influenced the development of the Renaissance in Europe.

SOURCE 8 Vasco da Gama's first voyage to India

Source: Based on http://media.web.britannica.com/eb-media/21/144621-050-B67E1FE0.gif

SOURCES 8 and **9** show two different trade routes between Europe and the East. **SOURCE 8** shows the journey of famed Portuguese explorer Vasco da Gama, while **SOURCE 9** shows the Silk Road, which stretched from Istanbul to China.

SOURCE 9 The Silk Road trade route

Source: Spatial Vision

4.5 SkillBuilder activity COMMUNICATING

In a historian's perfect world, there would be an equal amount of information available about all people, groups, places and events, and finding information would be as simple as using a search engine. Sadly, the historian's actual world is far from the perfect world. It can often be extremely challenging to find historical information, especially about minority groups or smaller players in historical events. In this activity, you will investigate one such group, which existed during the Ottoman Empire — the Janissaries.

1. Conduct research to **investigate** some facts about the Janissaries. Try to find information that will help you answer the following:
   - **Explain** who the Janissaries were and when this group was established.
   - **Explain** the role that the Janissaries played in the Ottoman Empire.
   - **Discuss** what made the Janissaries unique in the Ottoman military and how they were encouraged to stay loyal to the empire.
2. **Summarise** the information in your own words. Make it brief and interesting to keep people's attention.
3. **Construct** a fact sheet that will give another Year 8 student a useful description of the Janissaries and their role in the Ottoman Empire.

SOURCE 10 Who were the Janissaries?

4.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 6, 9	5, 7, 8, 10

REMEMBER AND UNDERSTAND

1. **State** why Constantinople was so important to the Byzantines. Select all that apply.
   A. It held strategic importance in the region.
   B. It was at its social and economic peak.
   C. It was a symbol of Christianity in Eastern Europe.
   D. It had been controlled by the Byzantines for nearly thirteen centuries.
2. **State** how Sultan Mehmet II tried to tempt Constantine XI into surrendering. Select all that apply.
   A. Mehmet II offered ships for Constantine XI to leave in.
   B. Mehmet II offered freedom of religion.
   C. Mehmet II offered Constantine XI territory in Greece.
   D. Mehmet II offered his own capital of Edirne.
3. **Examine** the attack on Constantinople.
   a. **Identify** the Ottoman army's main weapon against the walls of Constantinople.
   b. **Explain** how this technology made its way into Ottoman hands.
4. **Determine** whether the following statements are True or False.
   a. Sultan Mehmet II was *not* tolerant of other religions.
   b. Gunpowder and the cannon were originally from China and brought to the Ottoman Empire by the Mongols.
   c. The famed walls of Constantinople were first constructed by Emperor Theodosius II.
5. **Explain** how Islamic scholars could have influenced the development of the Renaissance.

ANALYSE AND APPLY

6. Carefully read **SOURCES 4** and **5**.
   a. **Identify** the reasons Sultan Mehmet II gave for attacking Constantinople.
   b. Candarli Halil warned the people of Constantinople that Sultan Mehmet II had quite a different attitude from that of his father, Murad. **Explain** what this different attitude was.
7. **Examine SOURCE 6**.
   a. **Construct** a timeline covering the period from August 1452 to May 1453 that shows the major stages in the Ottoman attack on Constantinople.
   b. **Explain** the strategies Sultan Mehmet II used to isolate Constantinople from the rest of Europe.

EVALUATE AND COMMUNICATE

8. **Examine SOURCE 6**. **Explain** why Constantinople was such an important city to control.
9. The Byzantines held Constantinople for more than a thousand years. **Explain** how the tactics used by Mehmet II differed to those used by other armies in the past.
10. 'The fall of Constantinople was the most significant event to occur during the reign of the Ottoman Empire.' **Evaluate** the accuracy of this statement.

Answers and sample responses for this topic are available online.

LESSON 4.5 Who was Suleiman the Magnificent?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** the achievements of Suleiman the Magnificent and compare his leadership strategies to other Ottoman rulers.

Tune in

Suleiman the Magnificent, Alexander the Great, and the less impressive Vasily the Cross-Eyed (a fifteenth-century Russian ruler) — many leaders throughout history have used or been given nicknames that represented their physical, philosophical or political characteristics.

Think of a famous leader and create a title or epithet for them based on their most notable characteristic (e.g., a physical trait, achievement, or philosophy).

Why do you think this title would represent them well?

Share your thoughts with a partner or the class.

SOURCE 1 'The Magnificent' is a nickname that suggests a lot about Sultan Suleiman.

4.5.1 Extending the empire

The Ottoman Empire continued to expand following the conquest of Constantinople in 1453. Under Selim I (1512–20), the empire had almost doubled in size; it included the territories of Syria and Egypt, parts of Persia and the Islamic holy places of Medina and Mecca, as shown in **SOURCE 2**. Selim I claimed the title of caliph of the Islamic world. But it was Selim's son, Suleiman, who was to become one of the most famous rulers of the Ottoman Empire.

Suleiman became Sultan in 1520 at the age of 29. Under his rule, the Ottoman Empire became the largest empire of the time and Suleiman was greatly respected and admired by the kings of Europe. He was a gifted poet and craftsman, and his rule saw great developments in art, literature and science; however, it was for his military accomplishments that Suleiman is more well-known (see **SOURCE 2**). To the west, Suleiman pushed the Ottomans' territory further into Europe, toward the Christian strongholds of Belgrade and Vienna. To the east, he conquered Persia, and to the south, the important port city of Aden. Suleiman's forces also captured significant territory in North Africa.

SOURCE 2 A map showing the expansion of the empire under Selim I and Suleiman

Source: Map drawn by Spatial Vision.

SkillBuilder discussion

Historical significance

1. With a partner, describe the location of the expansion of the empire under Selim I and Suleiman.
2. How did Selim I and Suleiman the Magnificent's expansion of the Ottoman Empire affect Europe's and the Middle East's political and economic landscape?
3. What was the strategic significance of the island of Rhodes for the Ottoman Empire?

A significant campaign in the early years of Suleiman's rule was his attack on the island of Rhodes in 1522. The knights of the Order of St John, successors to the early Crusaders, had seized the island from the Byzantines in 1309. The knights had been a constant thorn in the side of the Ottomans, attacking ships and thwarting Suleiman's advances across the Mediterranean. After an exhausting five-month siege, Suleiman signed a truce with the knights that gave him control of the island. This victory was strategically crucial for Suleiman and his empire because the Ottomans could now use Rhodes as a base for further campaigns across the Mediterranean and North Africa.

Suleiman's next target was eastern Europe. A series of successful campaigns gave him control of Serbia and Hungary. This brought Suleiman face to face with his long-time rival, the Hapsburg Empire.

The Hapsburg dynasty was based in Austria but, through wars and marriage alliances, it controlled a large part of western Europe, including Spain, Portugal, Poland and Hungary, as well as parts of the Netherlands and Italy. Suleiman laid siege to Vienna, Austria, in 1529. After 19 days, sections of the walls had been pierced and some of the outer suburbs burned.

However, a long and costly siege followed and, ultimately, Suleiman withdrew his forces. Three years later, Suleiman launched another failed attempt at taking Vienna. This failure marked the end of the Sultan's period of empirical expansion and Suleiman instead focused on administering the territory he had already gained.

SOURCE 3 A statue of Suleiman the Magnificent in Istanbul, Türkiye

4.5.2 Life and law under Suleiman

In Türkiye, Suleiman is known as Sultan Suleiman el-Kununi — the Lawgiver — because he organised a large-scale rewriting of the legal code. This was necessary because the empire contained many new regions and different ways of life.

SOURCE 4 An inscription in which Suleiman describes his power, from M. Guboglu, *Palaeografia si diplomatica Turco-Osmana, Bucarest*, 1958, p. 167, facsimile no. 7, quoted in H. Inalcik, *The Ottoman Empire*, Phoenix Press, p. 41

I am God's slave and sultan of this world. By the grace of God I am head of Mohammed's community. God's might and Mohammed's miracles are my companions. I am Suleyman, in whose name the hutbe [religious sermon] is read in Mecca and Medina. In Baghdad I am the shah, in Byzantine realms the Caesar, and in Egypt the sultan; who sends his fleets to the seas of Europe, the Maghrib and India. I am the sultan who took the crown and throne of Hungary and granted them to a humble slave. The voivoda [governor] Petru raised his head in revolt, but my horse's hoofs ground him into the dust, and I conquered the land of Moldavia.

SkillBuilder discussion

Using historical sources

1. How does the inscription by Suleiman the Magnificent help historians understand how he viewed himself and his power in the Ottoman Empire?
2. Why is it important to know that the portrait of Suleiman, **SOURCE 5**, attributed to Titian was created without the artist having met or seen Suleiman?
3. Discuss how the above affects its reliability as a historical source.

SOURCE 5 Portrait of Suleiman, attributed to the Venetian Renaissance painter Titian. There is no evidence that Titian ever met or saw Suleiman.

The challenges

The new legal system had to take into account the complex structure of the Ottoman Empire.

- Almost all of the empire, except parts of Africa, was mountainous. Communities were isolated from each other and had developed their own laws.
- There were many different lifestyles in the empire. Some Ottomans lived in great cities while others were nomads or merchants who travelled long distances.
- The empire was made up of people with many different faiths, including Christianity and Judaism. In some parts of the empire, Muslims were in the minority.

The solutions

When a new territory was captured, Ottoman officials tried to preserve as many of the local laws as possible, as long as these did not contradict the religious law or general legal principles of the empire. This strategy was incredibly progressive for a time when many other empires would simply enslave the people they conquered, forcing them to adopt new religions and customs. The system, known as *millet*, essentially provided the conquered community a degree of **autonomy**. This practice reduced opposition to Ottoman rule, ensured laws suited local conditions and also made collecting taxes easier.

The timing of the first official *millet* remains debated by historians. Some historians believe that the practice was established during Suleiman's reign; others claim it existed previously, while a third group argue that the *millet* system developed later in the Ottoman period. Even if it wasn't an official *millet*, this strategy had a critical role in strengthening support for the Ottoman Empire.

SOURCE 6 An Islamic painting from c. 1588 showing the army of Suleiman the Magnificent in front of Vienna

Christians and Jewish people

In Islamic belief, Jewish people and Christians were grouped with Muslims as 'People of the Book'; that is, people who shared the background of the Hebrew (Jewish) Bible, with its narratives of Abraham, Moses and the prophets.

As the territory controlled by the Sultans expanded, increasing numbers of Christians and Jewish people were living under Muslim rule. Although executions and forced conversions may have taken place occasionally, most people were generally left to practise their own religion under the *millet* system.

SOURCE 7 A sixteenth-century illustration showing an Ottoman Jewish person from Constantinople and an Arab merchant

4.5 SkillBuilder activity HISTORICAL QUESTIONS

Suleiman the Magnificent is remembered for his diplomacy and creative policy reforms, especially when dealing with the beliefs and customs of conquered peoples. Through the *millet* system, Jews and Christians were allowed to keep practising their religions if they paid taxes to Suleiman.

In small groups, **discuss**:

- the purpose of the *millet* system, including its advantages and disadvantages
- whether the *millet* system could work in a modern context; identify and explore any possible positive and negative implications of such a system in modern society
- whether it is necessary for all the citizens of a country to follow the same religion.

4.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5, 7, 8	6, 9, 10

REMEMBER AND UNDERSTAND

1. When Suleiman came to revise the legal code, what three special features of the empire's structure did he have to take into account?
   - A. The demands of the people
   - B. The isolation of communities
   - C. Different lifestyles of communities
   - D. His popularity
   - E. Different religious faiths throughout the empire
2. **Determine** whether the following statements are true or false.
   - a. The Ottomans let local people keep their own laws wherever possible.
   - b. Suleiman successfully conquered Vienna and expanded the Ottoman Empire into Austria, Spain, Portugal, Poland and Italy, securing his place in history as one of the most successful conquerors of all time.
   - c. Suleiman became the Sultan of the Ottoman Empire in 1520, expanding the empire to become the largest in the world at the time.
3. a. **Identify** the group that ruled over the island of Rhodes.
   b. **Explain** why Suleiman wanted these people removed.
4. The main rivals to the Ottomans in Europe were the _____ Empire. They controlled territory in much of _____ Europe.
5. **Discuss** why you think people have chosen to describe Suleiman as 'the Magnificent' or as 'the Lawgiver'.

ANALYSE AND APPLY

6. In **SOURCE 4**, **identify** what links Suleiman makes with earlier empires. What is he claiming for himself by doing this?
7. **Examine SOURCE 5**.
   - a. **Identify** what impression of Suleiman is presented in the painting.
   - b. Can this picture be trusted to give an accurate depiction of Suleiman? **Explain** why or why not.
   - c. If Titian did not actually see Suleiman, **identify** where he might have gathered the references from which to paint him.

EVALUATE AND COMMUNICATE

8. **SOURCE 6** is a representation of the Siege of Vienna.
   - a. Is it a primary or secondary source? **Justify** your response.
   - b. **Describe** the military tactics used by both sides.
   - c. **Explain** why you think Suleiman's attack on Vienna was unsuccessful.
   - d. **Explain** how useful **SOURCE 6** is in providing evidence of the siege.
9. **Evaluate** the ways in which the Ottoman Empire changed under Suleiman's command.
10. **Suggest** what Suleiman hoped to achieve by granting religious freedom to the territories he conquered.

Answers and sample responses for this topic are available online.

LESSON 4.6 What was life like in the Ottoman Empire?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** what daily life would have been like for people living in the Ottoman Empire.

Tune in

Many history resources, including this one, contain chapters that discuss the daily lives of people who lived in different periods and in different societies throughout history. These texts frequently talk about a society's socioeconomic characteristics, the status of women, children and education, music, food and fashion.

The question that you need to consider for this Tune In activity is simple: why? Why do we spend time investigating the daily life of historical societies? Why do we, as historians in the twenty-first century, need to understand what life was like for people during the Ottoman Empire?

Create a mind map that unpacks these questions or discuss the questions as a class or with a partner.

SOURCE 1 One of the highly decorated rooms in the **harem** courtyard in the Topkapı Palace

4.6.1 Daily life

Life within the Ottoman Empire varied greatly between people, usually depending on a person's social and economic status. The empire included many Christian and Jewish, as well as Muslim, communities. Most of the population lived as peasants in small villages, and in the north-east there was a large nomadic population. If each community paid its taxes to the Sultan, the communities were generally free to continue their own lifestyles.

Housing

Most homes in the towns were made of timber, although richer people might have had their bottom floor built with stone walls. Wooden houses meant fewer injuries during earthquakes, but also increased the danger of fire, especially as houses were built very close together and streets were very narrow.

Houses of the upper class usually had separate rooms for men and women. A space at the front, called the *selamlik*, was for men, and a space at the back, called the *haremlik*, was where women gathered. There were no chairs in the rooms. Boxes around the wall served as seats when covered with cushions.

SOURCE 2 A traditional-style Ottoman house in Antalya, Türkiye

For meals, food was placed on large trays on a low platform in the centre of the living room and people squatted around this. At night, some rooms could be converted to bedrooms.

Peasants' houses usually had only three rooms: one for sleeping, one for cooking and one as a sitting/dining room. The material the houses were built from depended on the material available locally, so they could be made of timber, stone or mud brick.

SkillBuilder discussion

Continuity and change

1. Describe the features of the Ottoman houses and the materials used to construct them.
2. Earthquakes were common in the region of the Ottoman Empire. Explain how this might affect how the houses were built.

Women and children in society

The following table outlines some of the likely social expectations and everyday experiences of women and children in the Ottoman Empire.

Category	Details
Women's clothing	Women wore a *şalvar* (baggy trousers), *gömlek* (long undershirt), *entari* (outer robe) and *yelek* (vest).
Women's clothing in public places	Women wore an outer robe; hair covered; veil.
Marriage features	Wife retained property control; husband's family provided dowry.
Divorce	Permitted. Husband to initiate by repeating 'You are divorced' three times. Wife to initiate by going to court with witnesses.
City occupations	Women were involved in trade via male agent.
Rural or village occupations	Women worked on farms or in the textile industry.
Children occupations	Children were engaged in spinning, weaving, farm work, textile production, apprenticeships.

SOURCE 3 This court case concerns a father who, in 1656, complained that his son had been employed against his will by the barber Yusuf. The father brought his case to a cadi (judge).

Master barber Yusuf, questioned on this matter, said that the boy joined his employ of his own free will and wishes to stay with his master and learn the trade. The boy was therefore summoned and questioned, and he too replied that he wishes to stay with his master in order to learn the barber's profession.

In view of these declarations the cadi informed the plaintiff [the father] that he is not to get custody of his son unless the son himself so wishes, since the boy is now a mature companion. He warned the plaintiff against trying to harm the defendant [the barber] or harass him.

Slavery

Like other civilisations at the time, slaves existed in the Ottoman Empire, but they had more opportunities and greater legal protection than many other slaves in the Middle Ages. While the Qur'an recognised slavery, it did recommend kindness to slaves and eventual liberation. Christians who had been captured and brought to work in the Sultan's palace could eventually obtain high positions in the empire. The case of the Ruthenian (modern-day Ukraine) slave Roxelana, who eventually became the legal wife of Suleiman the Magnificent, shows the possibilities available to some.

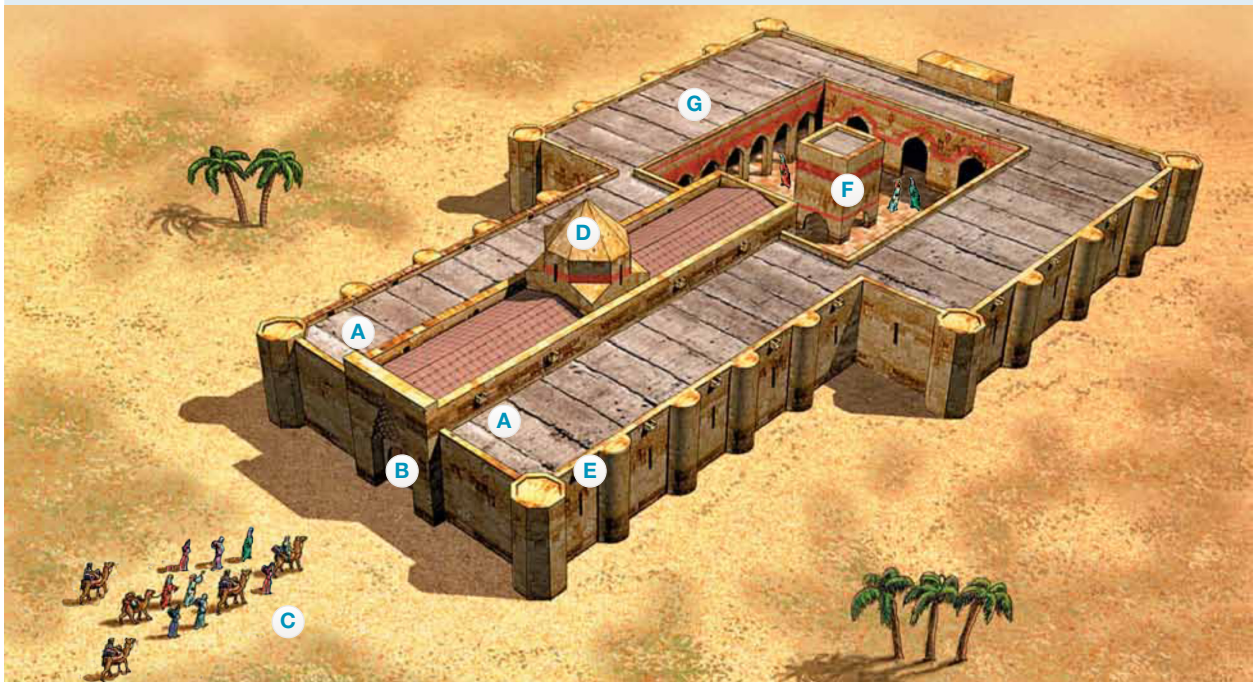
However, most slaves were women who worked as domestic servants. Their situation depended very much on the attitudes of the master and mistress of the house. If a domestic slave had a child by her master, the child was a free person. Slaves could also acquire their freedom when their masters died.

4.6.2 Trade and the marketplace

Trade

Trade was a large part of Islamic culture. Large caravans of camels carried goods long distances, often across difficult terrain such as deserts and mountains. Sultans organised the building of depots about 30 kilometres apart along these routes where the cameleers could rest from the long journey and be protected from thieves. These depots were called caravanserais. They were surrounded by strong walls and towers with a relatively small entrance. Each contained rooms for travellers to rest and, in the centre, there was a small mosque for the daily prayers.

SOURCE 4 An artist's reconstruction of a caravanserai



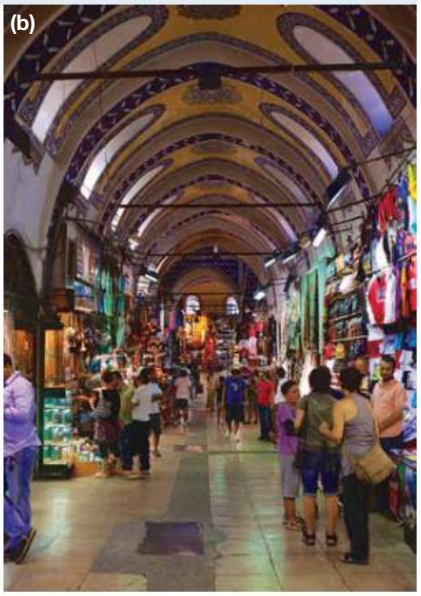
- **A** Winter quarters provided protection from cold weather.
- **B** The narrow entrance gate protected against thieves.
- **C** Camel caravans move in to rest for the night.
- **D** Domes allowed light into the rooms. This idea was further developed in the domes for mosques.
- **E** Gutters redirected water away from the building.
- **F** Raised mosques were important for prayers, usually made five times a day.
- **G** This accommodation was suitable for summer.

Bazaars

Once goods reached the major cities, they were sold in bazaars (markets). The Kapalıçarşı (Covered Bazaar, also known as the Grand Bazaar) in Istanbul is typical of these. Although it has undergone many changes due to earthquakes and fires, it has still preserved the same basic layout. It is located just one kilometre from the shore and at the start of the major road running east through the city.

As well as being a centre for trade, the bazaar also played an important role in bringing the local community together and became a place for meeting and socialising; a modern example is shown in **SOURCE 5**.

SOURCE 5 **a.** The Mahmutpaşa Kapısı gate of the Kapalıçarşı, the Grand Bazaar of Istanbul **b.** The Kapalıçarşı in Istanbul



SkillBuilder discussion

Historical questions

1. Work with a partner to identify the architectural features in the images of the Kapalıçarşı.
2. How did the location and structure of the Kapalıçarşı contribute to its role in trade and community life in Istanbul?
3. In what ways do you think the Kapalıçarşı has evolved over time, and what factors have influenced these changes?

DID YOU KNOW?

The Kapalıçarşı, which still operates today, contains more than 4000 shops. The largest shopping centre in Australia, Chadstone Shopping Centre in Melbourne, contains over 550 shops.

At the heart of a bazaar was the *bedestan*. This was a stone building with a domed roof. The *bedestan* had doors that could be locked at night; this ensured the safe storage of luxury goods such as precious metals, gems and silk.

SOURCE 6 An account of a *bedestan* in Bursa, written by Turkish traveller Evliya Efendi (1611–1682), from Joseph von Hammer's translation of *Narrative of travels on Europe, Asia and Africa in the Seventeenth Century* by Evliya Efendi, London, 1855, p. 12

The Bedestan is a large building with four iron gates secured with iron chains; its cupola is supported by strong columns. It contains three hundred shops in each of which merchants reside, who are as rich as the kings of Egypt. The market of the goldsmiths is outside the Bedestan, and separate from it; the shops are all of stone. There are also the markets of the tailors, cotton-beaters, cap makers, thread merchants, drapers, linen merchants, cable merchants, and that called the market of the bride, where essence of roses, musk, ambergris, etc are sold.

Coffee houses

The first coffee came from the seeds of a tree in Ethiopia. Sufis — Islamic mystics — used a brew from the seeds in their devotional practice. In a ceremony called 'remembrance of God', Sufis would go through long night sessions, reciting or chanting their love of God. Coffee was used as a stimulant to keep them awake.

Coffee was introduced to Istanbul in the early seventeenth century and men gathered in coffee houses to drink coffee, smoke tobacco and be entertained (see **SOURCES 7** and **8**).

Coffee houses were also centres of political discussion and, frequently, Sultans would have them closed or even burned down if their spies reported that mutinous talk was going on. Examples of this occurred during the reign of Murad IV (1623–1640).

SOURCE 7 A nineteenth-century illustration of a coffee house in Constantinople

The drinking of coffee and the cafe society spread from the Ottoman Empire to Vienna, Paris and London, and is very popular in Australia today.

4.6 SkillBuilder activity USING HISTORICAL SOURCES AND COMMUNICATING

SOURCE 8 Turkish traveller Evliya Efendi (1611–1682) writes about coffee houses. He is describing a coffee house in Bursa, the former capital of the Ottoman Empire.

> There are seventy-five coffee-houses each capable of holding a thousand persons, which are frequented by the most elegant and learned of the inhabitants; and three times a day singers and dancers execute a musical concert in them ...
>
> ... All coffee-houses, and particularly those near the great mosque, abound with men skilled in a thousand arts. Dancing and pleasure continue the whole night, and in the morning everybody goes to the mosque. These coffee-houses became famous only since those of Constantinople were closed by the express command of Sultan Murad IV. There are also no less than ninety-seven Buza-houses, which are not to be equalled in the world; they are panelled with faience [coloured tiles], painted, each capable of accommodating one thousand men.

You have just spent time investigating what daily life would have been like in a society that existed 700 years ago. Imagine that historians in the 2720s are studying what daily life was like in the 2020s and complete the following activities.

1. **Construct** a summary of your daily life using the same or similar headings as this lesson. Include images to assist your explanation.
2. Complete a table to **compare** and **contrast** daily life in the Ottoman Empire and your life today. Use the headings 'Similarities' and 'Differences' to help structure your analysis.

4.6 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 4, 7	2, 5, 10	6, 8, 9

REMEMBER AND UNDERSTAND

1. **Identify** what role children played in Ottoman society.
   A. Children were expected to go to school.
   B. Children were slaves.
   C. Children were expected to work.
   D. Only adults had a role in society.
2. Select the correct responses. In a wealthy Ottoman house, the ***haremlik*** / ***selamlik*** was the part of the house reserved for the men, while the ***haremlik*** / ***selamlik*** was where the women met.
3. **Summarise** what the Qur'an says about slavery.
4. **State** whether the following is True or False. Coffee was used as part of religious practice in the Ottoman Empire.
5. **Identify** the reasons Sultans might have had for closing down coffee houses.

ANALYSE AND APPLY

6. **Examine SOURCE 3**. What evidence does it provide about:
   a. the rights of children in the Ottoman Empire
   b. the legal system in the Ottoman Empire?
7. **Study SOURCE 4**.
   a. What evidence is there that the caravanserai was built to accommodate prayer?
   b. What other feature common to mosques was often seen in caravanserai?

EVALUATE AND COMMUNICATE

8. **Compare** the accounts provided in **SOURCES 6** and **8**. **State** which you believe is more accurate and **explain** why.
9. **Describe** the effect that the Ottoman marketplace had on the empire's ability to acquire new territories.
10. **Evaluate** how a simple coffee house could have a key role in Ottoman politics.

Answers and sample responses for this topic are available online.

LESSON 4.7 What was the Ottoman contribution to art, architecture and literature?

LEARNING INTENTION

By the end of this lesson you should be able to **state** what contributions Ottoman scholars and artists have made to society.

Tune in

The pursuit of knowledge and artistic endeavours flourished during the Ottoman Empire. **SOURCE 1** shows the skill of artists in a tile from a mosque.

1. **Before we investigate the accomplishments of Ottoman artists, scholars and architects in more detail, suggest reasons why these areas developed so much during the Ottoman Empire.**
2. **What features of Ottoman culture do you think enabled these achievements?**

SOURCE 1 A tile from an Istanbul mosque

4.7.1 Art and architecture

The modern world owes much to the Ottoman Empire. While most of Europe was in chaos for much of the Middle Ages, the Ottoman Empire was a centre of learning and advancement. Without the achievements of the Ottoman Empire during the first half of the second millennium, much of the learning from ancient Greece, Rome and Egypt would have been lost forever. Many of the later advances in European philosophy and science either occurred because the Ottomans collected and translated the works of the ancients, or were based on advances made by Ottoman scholars.

SkillBuilder discussion

Historical significance

1. Work with a partner and determine why the aqueducts like Sinan's were important for Istanbul during the Ottoman Empire.
2. How do Sinan's aqueducts show the skills of Ottoman builders?
3. How did the aqueducts help people in Istanbul, and why is this significant to understand the impact of Ottoman infrastructure?

SOURCE 2 An aqueduct designed by Sinan

Ottoman architects continued traditions started by the Seljuk Turks. Tall doorways and pointed arches were common to Seljuk mosques, schools and caravanserais. Blue, white and black designs with floral or geometric patterns were often used to decorate walls. Often a complex of buildings, called a *külliye*, surrounded a mosque. As well as the mosque, a *külliye* in the former capital of Edirne contained separate buildings including a hospital, a mental asylum and a bakery. A windowed dome over the mosque allowed the use of light to become a feature of Ottoman architecture.

It was under Suleiman and his architect Sinan (1489–1588) that Ottoman architecture reached its peak. One of Sinan's greatest achievements is the Süleymaniye Mosque, built in Istanbul from 1550. Its design mirrored that of the Christian church Hagia Sophia. In the structural features of the mosque, Sinan improved on the original. Sinan had discovered ways to incorporate supports within the structure so that fewer columns were needed. The Hagia Sophia had eight columns on each side but the Süleymaniye Mosque had only two. Sinan also made extensive use of windows, giving a light-filled weightlessness to the building. Sinan's contributions also included great public works such as aqueducts that brought water into the city for fountains and Turkish baths.

Another common feature of Ottoman architecture, geometric design, can also be found in art from the same period. Islamic art rarely featured images of real life. Instead, circles, squares and pentagons are repeated in carefully arranged sequences. Examples of Islamic geometric design can be seen in **SOURCE 3**. With clear links to mathematics, these designs were meticulously painted onto mosques, libraries and other important buildings. Another popular form of art was calligraphy. The Qur'an was written in Arabic, so letters themselves were seen to have a sacred quality, and lettering became an art form.

SOURCE 3 The interior of the Şehzade Mosque in Istanbul. The construction of this mosque was ordered by Suleiman the Magnificent in 1543.

SOURCE 4 A painting by Bihzad showing the construction of a fort

SkillBuilder discussion

Using historical sources

1. What does the painting by Bihzad tell us about the methods and tools used in fort construction during the time it was created?
2. How can we infer the importance of forts in the society depicted in Bihzad's painting?
3. What details in the painting help historians understand the everyday life and work of people involved in constructing the fort?

4.7.2 Literature

Although most regions that converted to Islam adopted Arabic as their language, the Ottomans were different. They kept their Turkish language for day-to-day use but used Arabic script for writing. Ottoman literature was, therefore, influenced by traditional Turkish language, the Arabic language of Islam and the Persian language of neighbouring regions. Some Ottoman poets such as Fuzuli (c. 1483–1556) could write fluently in all three languages, while others who wrote mainly in Turkish would borrow words from Persian and Arabic.

The epics

One favourite form of literature was the epic. These were written down in the thirteenth century but were based on an oral tradition going back over hundreds of years to when the Turks were nomads in Central Asia. One of these epics was called *The Book of Dede Korkut*. It includes the story of a young prince, Uruz, who was captured by Georgians when his father was out hunting near the Georgian border (see **SOURCE 5**).

These works were usually in Turkish and were meant to be sung. Poetry dealt with basic human emotions; some common themes were the value of country life, the search for love and homesickness. However, some of the songs were religious. One of the most renowned composers was Yunus Emre (c. 1238–1320) (see **SOURCE 6**). He still influences Turkish poetry today.

SOURCE 5 An extract from *The Book of Dede Korkut*. Kazan returns from a hunting expedition without his son, and his wife questions him.

My prince, my warrior, Kazan!

You rose up from your place and stood,

With your son you leaped on to your black-maned Kazilik horse,

You sent out [to] hunt over the great mountains with their lovely folds,

You caught and laid low the long-necked deer,

You loaded them on to your horses and turned homeward.

Two you went and one you came; where is my child?

Where is my child whom I got in the dark night?

My one prince is not to be seen, and my heart is on fire.

Kazan, have you let the boy fall from the overhanging rocks?

Have you let the mountain-lion eat him?

Or have you let him meet the infidel of dark religion?

SOURCE 6 A devotional poem by Yunus Emre, translated by Taner Baybars

Knowledge is to understand

To understand who you are.

If you know not who you are

What's the use of learning?

The aim in learning is

To understand God's Truth.

Because without knowledge

It is wasted hard labour.

Do not say: I know it all,

I am obedient to my God.

If you know not who God is

That is sheer idle talk.

Twenty-eight syllables

You read from end to end.

You name the first 'alpha'

What can it possibly mean?

Yunus Emre says also

Let me receive what I need.

The best possible thing

Is to find perfect peace.

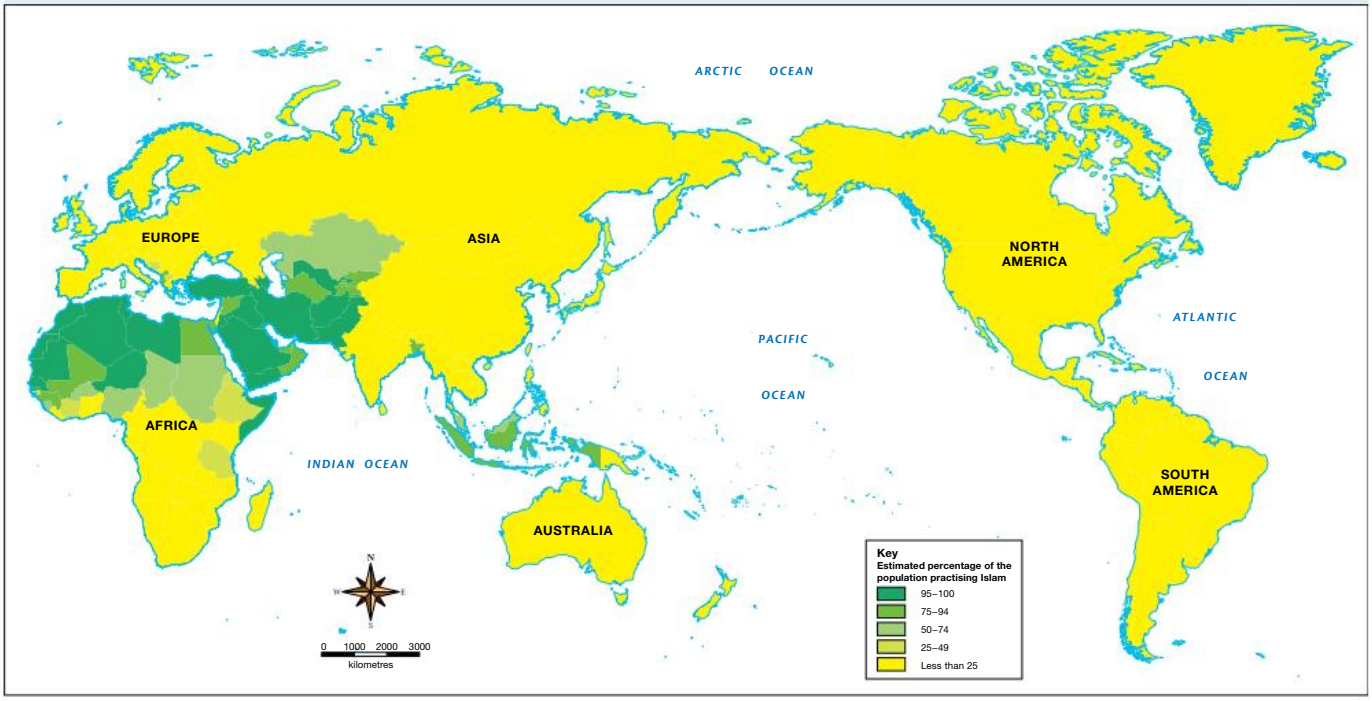
4.7.3 Modern influence

Modern-day Türkiye is heavily influenced by the Ottoman Empire; this is visible in its architecture, culture, and political system. Despite its Islamic foundation, the Ottoman Empire tolerated other religions, a legacy seen in Türkiye's secularism and tolerance. The empire's vast reach extended its influence across the Middle East, including its practice of allowing some self-government. Although not perfect, the Ottoman Empire ranks with the Roman and Byzantine empires as one of history's most powerful and enduring empires, serving as a major link between East and West for centuries.

SOURCE 7 The Auburn Gallipoli Mosque in Sydney. The Ottoman-style mosque has been listed by the National Trust as an architecturally and culturally significant building.

Islam is one of the world's great religions. It has more than one and a half billion followers, making it the second-largest religion in the world. As seen in **SOURCE 8**, most Muslims live in the Middle East and Africa, but Islam is practised worldwide, including in Australia. Understanding Islam is crucial for active community participation, as it influences Australian society and international relations.

SOURCE 8 A map showing Islam in the modern world



Source: Map drawn by Spatial Vision.

4.7 SkillBuilder activity USING HISTORICAL SOURCES

SOURCE 6 contains a poem by the famous Ottoman poet Yunus Emre. In this activity you will **analyse** Emre's poem and discuss its connection to the key themes of the Ottoman way of life.

a. In the first stanza, **identify** what the poet says is the main reason for learning.
b. **State** how the second stanza is connected with religion.

c. **Identify** what the poet includes in the first line of the last stanza. (This was a common practice in Ottoman poetry of this period.) **Explain** why this might have been done.
d. **State** whether poems are *accurate* historical sources. **Explain** your response.
e. **State** whether poems are *useful* historical sources. **Explain** your response.

4.7 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 5	4, 7, 9	6, 8, 10

REMEMBER AND UNDERSTAND

1. **Explain** whether the following is True or False. A *külliye* is a form of writing.
2. **Identify** the two main forms that poetry and song took in Ottoman literature.
   A. Sonnets
   B. Epic poems
   C. Folk poetry and songs
   D. Lullabies
3. **Identify** the two main languages used by Ottoman poets and writers.
   A. Turkish
   B. Persian
   C. Greek
   D. Arabic
   E. Latin
4. **Describe** the architectural features that were shared by Seljuk and Ottoman architecture.
5. **Identify** how modern Türkiye's secularism and religious tolerance is influenced by the Ottomans.

ANALYSE AND APPLY

6. **Examine SOURCE 3**. **Identify** any shapes you can see repeated in this image. **Clarify** what evidence there is that suggests art and mathematics were closely linked.
7. **Describe** some of the activities being conducted in **SOURCE 4**. **Explain** what this tells us about the Ottomans.
8. Carefully **analyse SOURCE 6**.
   a. In the first stanza, what does the poet say is the main reason for learning?
   b. How is the second stanza connected with religion?
   c. What does the poet include in the first line of the last stanza? (This was a common practice in Ottoman poetry of this period.) Why might this have been done?

EVALUATE AND COMMUNICATE

9. **Compare SOURCE 8** with some of the maps from lesson 4.2 that show where Islam originated.
   a. Is Islam still prevalent in the areas where it started?
   b. Where has Islam spread to since 750 CE?
10. 'The Ottoman Empire does not deserve to be remembered in the same way as the empires of Rome and Greece.' **State** whether you agree or disagree with this statement. **Justify** your response.

Answers and sample responses for this topic are available online.

LESSON 4.8 Inquiry: Collaborative research

LEARNING INTENTION

By the end of this lesson you should be able to work as part of a team to research and analyse sources to determine and discuss significant legacies of the Ottoman Empire.

Background

Collaborative research and writing is a key part of professional historical practice. Historians often work in teams to investigate and analyse sources and to prepare their findings for other historians to read and use. In this inquiry, you will work as a team to investigate the legacies of the Ottoman Empire.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

In groups of three or four, investigate the legacies of the Ottoman Empire.

Inquiry steps

Each group member **identifies** and **describes** (in paragraph form) what they believe to be the most significant contribution or aspect of the Ottoman Empire. Consider its legacy and the way it influenced Ottoman culture and the wider world. Each group member **justifies** their opinion with evidence from this topic or from additional sources.

Step 1: Questioning and researching

Working in groups, you will investigate the legacies of the Ottoman Empire. Before you begin your research, it is crucial that you develop the parameters or boundaries of your investigation. The best way to do this is to develop guiding research questions. Examples of such questions may include:

- What is a legacy?
- What aspects of Ottoman culture are still seen today?
- Why do these aspects of Ottoman culture still exist?

For example, what do they have in common with contemporary society?

Step 2: Using historical sources

Each group member identifies and describes (in paragraph form) what they believe to be the most significant contribution or aspect of the Ottoman Empire. Consider its legacy and the way it influenced Ottoman culture and the wider world. Each group member justifies their opinion with evidence from this topic or from additional sources.

Each group member then reads their response to the group. The other group members take their own notes and observations to be provided as feedback. This process is repeated until all group members have presented their opinions.

Step 3: Historical perspectives and interpretations

After you have heard from each group member, hold a group discussion. In this discussion, you should ask each other questions about your findings. Ask your classmates to justify their legacies and why they choose them over your chosen legacy.

Step 4: Communicating

Using the feedback from group members, each student rewrites their paragraphs and submits them to their teacher. Include the notes you took from your group discussions in your submission.

Complete your self-assessment using the **Inquiry rubric** or access the 4.9 exercise set to complete it online.

LESSON 4.9 Review

4.9.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

4.2 Leadership and power in the Ottoman Empire

- The Sultan had absolute power, governing the vast empire via the Imperial Council and governors in the many *eyalets* (provinces).
- The *millet* was a system that gave each religious group within the empire considerable autonomy, helping keep peace between the different groups.
- Order was maintained via the legal system (sharia law and cadis) and military power (Janissaries). Non-Muslim *millets* also had their own legal systems.What are the origins of the Ottoman Empire?

4.3 How did the Ottoman Empire expand?

- By the thirteenth century, the Middle East was made up of a series of states competing for dominance. The emerging Ottoman Empire took advantage of this political uncertainty to expand its influence.
- Osman I is credited as being the first ruler of the Ottoman Empire.
- Osman's successor, Orhan, solidified the Ottoman's status and laid the foundation for further expansion by subsequent rulers.
- Murad I successfully conquered parts of the Balkan States, providing the ability for the Ottomans to attack its key rivals in Europe.

4.4 What caused the fall of Constantinople?

- After a brief period of instability at the beginning of the fifteenth century, the influence and power of the Ottoman Empire continued to spread. Soon, the Ottomans were ready to launch an attack on the capital of the Byzantine Empire, Constantinople.
- For more than a thousand years, the rulers of Constantinople had built and maintained strong defences, mainly through the construction of thick, fortified walls.
- The siege lasted 53 days and is seen by historians as the event that signifies the end of the Roman Empire.

4.5 Who was Suleiman the Magnificent?

- Under the rule of Suleiman, the Ottoman Empire became the largest and most powerful empire at the time.
- Suleiman's rule oversaw significant developments in art, literature and science, yet he was also known for his military accomplishments.
- Followers of Christianity and Judaism were offered significant religious freedom under Suleiman.
- Suleiman attempted to conquer his biggest European rival, the Habsburg Empire, but his failure to do so marked the end of Ottoman expansion into Europe.

4.6 What was life like in the Ottoman Empire?

- Life within the Ottoman Empire varied greatly, usually depending on a person's social and economic status.
- Houses of the wealthy usually had multiple rooms, whereas the houses of poorer groups of society were usually single-room, multi-purpose dwellings.
- Clothing, and particularly headwear and belts, was a sign of status in the community.
- The status of women during the Ottoman Empire was inconsistent. While women had some civil and property rights, they were still not considered equal members of society.
- Trade was a significant part of Ottoman culture, with large caravans of camels and traders travelling large distances to exchange goods.

- Caravanserais were protected trading stations built by Sultans to protect traders and their goods from thieves.
- Bazaars and coffee houses were important social and political hubs.

4.7 What was the Ottoman contribution to art, architecture and literature?

- While most of Europe was focused on political and military struggles during the Middle Ages, the Ottoman Empire continued to be a centre of learning and advancement.
- Many of the later advances in European philosophy and science either occurred because the Ottomans collected and translated the works of the ancients or were based on advances made by the Islamic people.
- A common feature of Ottoman architecture, geometric design with circles, squares and pentagons are repeated in carefully arranged sequences.
- The Ottomans kept their Turkish language for day-to-day use but used Arabic script for writing. Their literature was, therefore, influenced by their traditional Turkish language, the Arabic language of Islam and the Persian language of neighbouring regions.
- The influence of the Ottoman Empire is responsible for the presence and popularity of Islam in modern society.

4.8 Inquiry: Collaborative research

- Several aspects of Ottoman culture still exist in contemporary society.
- Collaborative research can be used to determine and discuss history.

4.9.2 Key terms

autonomy the ability to self-govern
beylik a small territory in Anatolia
caliph in Islamic countries, the chief civil and religious ruler and a successor to the Prophet Mohammed
dowry a payment of money or goods as part of a marriage agreement
harem the women in a Muslim household, including the mother, sisters, wives, concubines, daughters, entertainers and servants
revelation a communication or message from God
sultan the king or sovereign of an Islamic country

4.9.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview:

How did the Ottoman Empire become one of history's most powerful and diverse societies?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

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Post-test	Online post-test
eWorkbook	Customisable worksheets for this topic (ewbk-14236) Reflection (doc-10698)
Digital document	Key terms glossary (doc-43118)
Video eLesson	The Ottoman Empire (c. 790–1066) (eles-1825)

4.9 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 6, 7, 11	3, 4, 8, 10	5, 9, 12, 13

REMEMBER AND UNDERSTAND

1. In which city was the prophet Mohammed born?
   A. Mecca
   B. Constantinople
   C. Jerusalem
   D. Medina
2. What name was given to the leader of the early Islamic Empire?
   A. Prophet
   B. Sultan
   C. Caliph
   D. Mufti
3. Which of the following was an achievement of Osman I?
   A. He gained access to the Dardanelles.
   B. He led the Siege of Constantinople.
   C. He founded the Ottoman Empire.
   D. He extended the Ottoman Empire to its furthest reach.
4. The fall of Constantinople marked the:
   A. beginning of the true Ottoman Empire.
   B. fall of the Ottoman Empire.
   C. fall of the Roman Empire.
   D. end of Christianity in Europe.
5. What kind of freedoms did Sultan Suleiman the Magnificent provide to followers of Christianity and Judaism?
   A. Freedom from taxation
   B. Freedom of religion
   C. Freedom from slavery
   D. Freedom from military service
6. Which of the following provides the best definition of *caravanserai*?
   A. Fortified mosque
   B. Fortified trading station
   C. Fortified palace
   D. Fortified jail
7. What kind of artistic design is featured heavily in Ottoman art and architecture?
   A. Geometric patterns
   B. Realism
   C. Religious paintings
   D. Stone cuttings

8. Which modern country is most heavily influenced by the Ottoman Empire?
   A. Türkiye
   B. Iran
   C. Greece
   D. Lebanon

ANALYSE AND APPLY

9. Although this topic is about the Ottoman Empire, it begins with an explanation of the spread of Islam. Why do you think the author chose to start the topic in this way?
10. The Qu'ran urges people to acquire knowledge in order to bring them closer to God. **Describe** how this direction influenced education during the Ottoman Empire.
11. Numerous Ottoman rulers attempted to take control of the Byzantine capital, Constantinople. **Explain** why this city was so important to the Ottomans.
12. If Islamic religion was such an important part of Ottoman life, **explain** why rulers like Suleiman the Magnificent would allow Jewish people and Christians to keep practising their own religions.

EVALUATE AND COMMUNICATE

14. 'The Ottoman Empire may not have been the biggest empire in history, but it was the most important.' To what extent you agree with this statement.

Answers and sample responses for this topic are available online.

5 Renaissance Italy

LESSON SEQUENCE

online only

5.1 Overview
5.2 How do we know about Renaissance Italy?
5.3 What were the origins of the Renaissance?
5.4 Why is Florence called the cradle of the Renaissance?
5.5 How did Venice contribute to the Renaissance?
5.6 What was it like to live during the Renaissance?
5.7 How did art, architecture and sculpture change during the Renaissance?
5.8 Who contributed to the Scientific Revolution?
5.9 How did the Renaissance spread?
5.10 What were the Reformation and Counter-Reformation?
5.11 What were the legacies of the Renaissance?
5.12 Inquiry: Who were the significant women of the Renaissance?
5.13 Review

LESSON 5.1 Overview

INQUIRY QUESTION

How did societies change during the Renaissance?

How have individuals, groups and ideas from the Renaissance influenced the modern world?

The term Renaissance has been used to describe great changes in art, science and learning that took place in Italy during the fifteenth and sixteenth century. These changes began in Italy and spread throughout Europe. These transformative ideas during the Renaissance sparked debates that not only reshaped people's understanding of the world but also laid the foundation for modern thought and innovation.

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- **Pre-test**
  Online pre-test
- **eWorkbook**
  Customisable worksheets for this topic (ewbk-14238)
- **Digital document**
  Key terms glossary (doc-43119)
- **Video eLesson**
  Renaissance Italy (c. 1400–1600) (eles-xxxx)

1409
The council at Pisa elects a new Pope, Alexander V, bringing the total to three.

1445
Johannes Gutenberg produces the first European book on a printing press using moveable type.

1501
Michelangelo begins work on his great statue *David*.

1400 — 1450 — 1500

BCE

1417–1436
Brunelleschi creates the dome of Florence Cathedral.

1492
Christopher Columbus sails to the Americas. Leonardo da Vinci designs a flying machine.

1517
Martin Luther begins the Protestant Reformation.

SkillBuilder

Use the SkillBuilder activities to develop these Historical concepts and skills:

- HISTORICAL QUESTIONS
- CHRONOLOGY
- USING HISTORICAL SOURCES
- CONTINUITY AND CHANGE
- CAUSES AND CONSEQUENCES
- HISTORICAL SIGNIFICANCE
- COMMUNICATING

1519
Ferdinand Magellan begins his voyage around the world.

1531–1532
The Church of England breaks away from the Roman Catholic Church.

1543
Nicolaus Copernicus publishes the first book showing that the Earth is not the centre of the universe.

1545
The Council of Trent established the decrees of the Counter-Revolution.

1550

1589–1613
William Shakespeare creates most of his known work.

1590
The dome of St Peter's is completed.

1600

1606
Dutch sailors first land in Australia.

1632
Galileo Galilei publishes his Dialogues on the solar system.

1650

CE

LESSON 5.2 How do we know about Renaissance Italy?

LEARNING INTENTION

By the end of this lesson you should be able to:

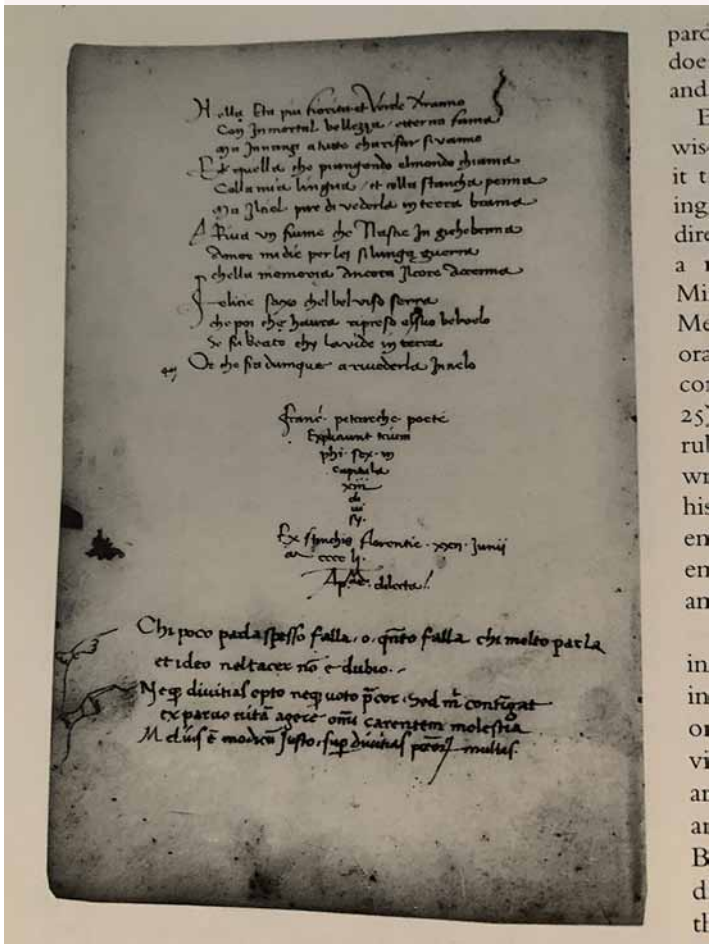
- **identify** a range of sources from the Renaissance
- **describe** their usefulness in understanding the period
- **define** the period of history called 'the Renaissance'.

Tune in

Renaissance individuals were meticulous diary keepers. In addition to diaries, literate people from merchants to soap-makers kept scrapbooks (*zibaldoni*) in which they carefully recorded snippets of advice, excerpts of texts and news of the day. These books could take years to complete and were intended to be guides for younger generations. Italian writer Giovanni de' Bardi wrote in the front of his book: 'O you who read me, please don't mislay me, for I am the guide and companion of he who copied me.'

1. **What kinds of information do you think historians might discover in these diaries?**
2. **How do you record your experiences?**
3. **How might the information you save about your life compare to the recorded experiences of people living during the Renaissance?**

SOURCE 1 Manuscript of soap-maker Antonio di Guido Berti which was written over a two-year period.



5.2.1 How do we know about the Renaissance era?

The term *Renaissance* comes from the old French term *renaistre*, meaning 'rebirth', and was first used in 1860 by Swiss historian Jacob Burckhardt to describe the renewed interest in the ideas of Ancient Greece and Rome during the fifteenth century in Italy.

5.2.2 What was the Renaissance?

During the Renaissance, the study of classical texts and artefacts combined with innovation to create a period of great cultural change. It was a period of cultural expression and renewed intellectual curiosity that challenged some existing beliefs and values, particularly in religion and politics. A new movement called Humanism stressed the dignity of human beings and the importance of reason and inquiry in learning. The works of writers such as Petrarch and Vasari suggest that the writers and artists of the time felt that they were part of a new direction in art and literature.

With the benefit of historical perspective, historians have argued that the social changes and cultural expression of the Renaissance developed from trends formed during the medieval period. Contact with other societies brought new ideas to Europe. The Crusades of the eleventh century brought Europeans into contact with exotic goods, such as spices from the East, and classical texts from Greece and Rome that were preserved by the Byzantine and Arab civilisations. Several universities were established in the medieval era that continued the study of ancient texts, including Bologna in 1088, Oxford in 1096, Cambridge in 1209, Padua in 1222 and Naples in 1224. Many individuals who contributed to the Renaissance studied at these universities.

SOURCE 2 A view of the city of modern-day Florence, Italy. Filippo Brunelleschi's great fifteenth-century dome of the Cathedral of Santa Maria del Fiore towers above the city.

SkillBuilder discussion

Historical questions

1. What might the construction of such an impressive structure in Florence tell us about the city's role in the Renaissance?
2. Why do you think Brunelleschi's dome was considered an important achievement during the fifteenth century?

5.2.3 Primary sources

A great many sources of information survive from the Renaissance that enable students to understand the period. A few examples are:

- maps and diaries of travellers who explored new areas previously unknown to Europeans, including *The Travels of Marco Polo* (c. 1350)
- histories of the Renaissance period, including Vasari's history of art, *Lives of the Most Excellent Painters, Sculptors and Architects* (1550) and political histories of Florence by Bruni, Guicciardini and Machiavelli
- collections of letters that have survived, including the letters of early Humanist Petrarch, the letters of artist Michelangelo and letters written by women such as the collections of Isabella d'Este and Lucrezia 'Nannina' de' Medici
- the business accounts of merchants in cities such as Florence, Venice and Genoa
- wills written by various individuals, including women and the lower classes
- the contents of libraries, including those established by Cosimo de' Medici and Federico of Urbino
- the preserved diaries of many careful diary writers, including Marino Sanudo, Buonaccorso Pitti, Gregorio Dati and Marco Parenti
- books written during the Renaissance, including *The Prince* (1513) by Niccolo Machiavelli and the works of William Shakespeare (1564–1616)
- some of the writing of Martin Luther (1483–1546) that was printed on a press
- the music of composers including Giovanni Palestrina (1525–1549)
- the architecture, sculpture and art of the Renaissance, including the work of Brunelleschi, Leonardo, Michelangelo and Titian
- objects, such as the instruments used by Galileo to study the planets.

SOURCE 3 The Ospedale degli Innocenti (Hospital of the Innocents), built by Filippo Brunelleschi in 1419 as an orphanage, was commissioned by the Silk Guild of Florence. It is considered an excellent example of Renaissance architecture for its use of symmetry, proportion and columns.

5.2 SkillBuilder activity USING HISTORICAL SOURCES

SOURCE 4 *The Merchant of Prato* by Iris Origo

'Your letter was placed in my hand when we were at table, and Tessa my wife was there; and I vow, my delight and amusement caused me to change countenance [expression], so that my wife was consumed with curiosity to know the subject of what I read.'

Letter of Ser Lapo Mazzei, writing to the wife of his friend, Margherita Datini, whom Mazzei taught to read and write when she was over thirty years of age.

Analysing sources

To analyse a source, consider: origin, motive, content and context, intended audience, perspective, reliability, usefulness/significance

Origin: Letter of Ser Lapo Mazzei to Margherita Datini

Intended audience: Margherita Datini

Content and context: Having taught Margherita to read and write, Mazzei was eager to be updated on her progress through regular contact.

Perspective: Not only does Mazzei indicate that he is pleased with Margherita's writing, but he also he takes care to tell her that he finds her letters entertaining.

Reliability: This is a highly personal communication, and we cannot conclude from it that large numbers of women in the Renaissance were taught to read. However, as this communication was intended to be private, Mazzei had no reason to invent his perspective.

Significance: This letter is evidence of a Renaissance woman, Margherita, the wife of a merchant, who is taught to read and write. It is also clear that she shared regular correspondence with her teacher Mazzei, who was a business associate and friend of her husband Francesco.

SOURCE 5 Diary of Ser Lapo Mazzei written in 1400, recording the death of his mother

On the 27th, when I visited her, she was lifted up and brought to the fireside to sup [eat] with me, when suddenly crying out, 'Oh, God, help me!' she drew two long breaths, and gave up the ghost in my arms . . . she departed in peace, and left me, ungrateful and weak as I am, most disconsolate. For during her sickness, not thinking her near death, I was not humble and courteous as I would have wished to be. Had I but slept and talked beside her for a single night and comforted that poor little old body and persuaded that tired spirit to depart gladly, towards God, our home.

1. a. **Origin:** Record the source details.
   b. **Motive/intended audience: Suggest** why this source was created. **Suggest** whether the author would have intended for the source to be read by others.
   c. **Content and context: Describe** the event recorded in Mazzei's diary entry.
   d. **Perspective: Analyse** Mazzei's feelings about this event. Use short quotes from his diary to support your points.
   e. **Reliability:** Mazzei's mother is described in the diary entry. **Discuss** whether it is possible for readers to understand her perspective from the information in the source. Provide reasons for your answer.
   f. Use Trove or Google Scholar to locate another example of a Renaissance diary. Published diary authors include Marino Sanudo, Priuli, Buonaccorso Pitti, Gregorio Dati, Francesco Datini and Marco Parenti. Having found a diary extract, **determine** the following: origin, motive, content and context, intended audience, perspective, reliability, and usefulness/significance.

5.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 6	7, 8, 9, 10

REMEMBER AND UNDERSTAND

1. Jacob Burckhardt used the old **Latin** / **French** / **German** term *renaistre* in 1860, which means '**artistic** / **new** / **rebirth**', and described fifteenth-century Italy as the Renaissance because he regarded this as a time when the ideas and talents of Ancient **Greece** and **Rome** / **China** / **Italy** were rediscovered.
2. **Match** each of the below universities with the year in which they were founded. Place the corresponding letter into the answer column.

Oxford		**a.** 1088
Naples		**b.** 1222
Bologna		**c.** 1224
Padua		**d.** 1096
Cambridge		**e.** 1209

3. **Determine** whether the following is True or False. There is evidence that suggests that the culture of the ancient Greeks and Romans had not disappeared during the medieval period.
4. **Identify** which of the below outline the idea of Humanism. Select all that apply.
   A. Humanism encouraged people to follow the Church's teaching on all matters.
   B. Humanism focused on the dignity of people.
   C. Humanism was an unsuccessful attempt to start a new religion.
   D. Humanism encouraged people to use reason and their own observations to draw conclusions and gain knowledge.
   E. Humanism focused on gaining wealth and status.
5. **Describe** the evidence which suggests that the culture of the ancient Greeks and Romans had not disappeared during the medieval period.

ANALYSE AND APPLY

6. **Identify** the changes that occurred during the Renaissance.
7. Select two primary sources that survived from the Renaissance. **Develop** two questions for each source. **Identify** whose perspective is likely to be presented in each source.
8. **Examine SOURCE 2**. **Suggest** what the scale and style of the cathedral reveal about the society which built it.
9. **Investigate SOURCE 3**. **Create** a table and record your impressions of the building. Use the headings 'See', 'Think', 'Wonder'.
   - **Explain** what you see in the image. **Hint:** record the shapes of the building.
   - **Discuss** what you think about what you can see. **Hint:** record your reactions to the building and information about its construction.
   - **Discuss** what you wonder about the image. **Hint:** this building was designed to be an orphanage. Record your questions.

EVALUATE AND COMMUNICATE

10. Assess the extent to which the ideas of the Renaissance were a continuation of those from the medieval period.

Answers and sample responses for this topic are available online.

LESSON 5.3 What were the origins of the Renaissance?

LEARNING INTENTION

By the end of this lesson you should be able to **identify** the factors which contributed to the beginning of the Renaissance in Italy.

Tune in

In the fifteenth century, Italy was divided into separate states that were not unified until the late nineteenth century.

SOURCE 1 A map of Italy in 1494

Source: Spatial Vision

Examine **SOURCE 1** and record your observations about the city-states of Italy. Pay attention to the names of the city-states. Review your notes at the end of the lesson.

5.3.1 The growth of city-states

The Renaissance thrived in Italy from the fifteenth century, especially in city-states such as Florence, Genoa and Venice, whose industry and trade increased during the period. These cities were at the crossroads of trade routes linking Europe, the Middle East and Asia. This central position allowed for the exchange of ideas and products, and interaction between people. From Italy, the Renaissance spread to northern Europe, especially after 1445 when books started to be printed in Europe.

During the Renaissance, Italy was divided into independent city-states (see **SOURCE 1**). A city-state is an independent urban centre and the surrounding countryside, including small towns, which was governed by its own laws and political system.

City-states were run by a variety of political systems, including **republics** such as Florence, Venice, Lucca and Siena in which political power was shared between eligible citizens. Others were controlled by single **hereditary** rulers, such as Naples, which was ruled by a king, and Milan, which was ruled by a duke. The city-states were often at war with each other and competed for status. For example, Leonardo Bruni wrote glowingly of his adopted home Florence in **SOURCE 2**.

SOURCE 2 From Leonardo Bruni, Panegyric to the city of Florence, 1403–04

What about the splendour of the architecture, the buildings, the cleanliness, the wealth, the great population, the healthfulness, and pleasantness of the site? What more can a city desire? Nothing at all.

SkillBuilder discussion

Using historical sources

1. What aspects of Florence does Leonardo Bruni praise in his writing?
2. Why do you think Bruni describes Florence as having "great wealth" and "healthfulness"?
3. What can we learn about how people viewed Florence during the Renaissance from Bruni's description?

5.3.2 The rise of the patron

Historians believe that the Renaissance began in Italy in the 1300s with a renewed interest in the ideas of classical Greece and Rome. Francesco Petrarch was one of the first Italian thinkers to translate these works, including the works of Cicero and Livy. Greek scholars, including Manuel Chrysoloras, moved to Italy, bringing with them ancient manuscripts and teaching Greek in the schools and universities of Italy.

Growing trade with the East and new industries made a new group of medieval people wealthy. These businesspeople, who made their money in trade, banking and cloth production, wanted to demonstrate their education and values, and beautify their city-states. To do this, they commissioned art, architecture, literature and music.

The desire to imitate and surpass the ancient civilisations of Greece and Rome led to developments in art, architecture, literature, music, **philosophy**, education and science. These **patrons** had a significant role in the development and spread of the ideas of the Renaissance, as they were able to use their knowledge and wealth to influence the work created. Artists and intellectuals often moved from place to place in search of a patron, spreading the ideas of the Renaissance across Italy and later into Europe.

5.3.3 Humanism

The social and cultural developments of the Renaissance were greatly influenced by the ideas of Humanism. Humanism comes from the Latin word *humanitas*, but its meaning is broader than the translation 'humanity'. Humanism involved the study of ancient Latin and Greek scholars. Humanists were influenced by ancient thinkers like Cicero, who argued that the mind must be cultivated through a broad education. This led to an expanded curriculum including mathematics, science, rhetoric, history, music and poetry.

Humanists also believed in the potential of individuals to comprehend the world and influence society for the better. The Humanists encouraged people to use their talents to create, invent and explore. For example, Pico della Mirandola (1463–1494) was a Humanist who argued that God gave humans the potential to achieve great things if they used their talents.

This led to great advances in science and mathematics, which will be discussed later. Some Humanists encouraged individuals to use their talents for the good of their local communities, which encouraged civic duty and pride.

Did you know?

Marco Polo (c. 1254–1324) was a Venetian traveller who left Europe in 1271 to journey to Asia. Travelling by ship and then overland, Polo passed through the Middle East and across the Asian continent via the Silk Road to China, where he spent 17 years.

Polo returned to Venice in 1295, bringing with him porcelain, silks, spices and jade, along with many tales of his extraordinary travels.

SOURCE 3 From *The Travels of Marco Polo*, about the kingdoms and marvels of the East

Suju is a very great noble city. They possess silk in great quantities, from which they make gold brocade . . . and they live by their manufactures and trade. There are also in this city many great philosophers and diligent students of nature.

SOURCE 4 A mosaic artwork of Marco Polo that can be found in Palazzo Tursi, in Genoa, Italy.

5.3 SkillBuilder activity HISTORICAL PERSPECTIVES AND INTERPRETATIONS

The Renaissance was a time that saw the emergence of many new products and ideas. **Create** a mind-map showing the causes of these changes and unpacking the changes themselves.

Mind-maps are used to help us identify and understand the connections between events or ideas in history. You will need a large piece of paper to write on and some coloured pencils. Alternatively, you may like to use a coloured lotus diagram.

1. Begin by putting the central idea of the Renaissance in the centre. Write a few words to **summarise** the Renaissance under the heading.
2. Think of as many changes as you can and record them. You may like to work with a partner. Each change should have its own colour. For example, write down classical influences in one colour.
3. Now record the consequences of classical influences in the same colour using a circle or a square from the lotus diagram. For example, Humanists were influenced by the ideas of Cicero. Wherever possible, record an example of a change (e.g. for the ideas of the Humanists you might write a new curriculum).
4. Use arrows to **illustrate** connections between your ideas (e.g. you could connect Humanists with the printing press).

5.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4	6	5, 7, 8

REMEMBER AND UNDERSTAND

1. **Determine** if the following statements are True or False.
   a. Italy's location was important in exchanging goods and ideas.
   b. Patrons were responsible for delaying the spread of Renaissance ideas.
   c. City-states were run by different political systems.
2. **Explain** why wealthy individuals, including rulers, bankers and merchants, became patrons of the arts. **Select** all that apply.
   A. To display their economic wealth and political power
   B. To demonstrate their sophistication
   C. To promote the arts within their community
   D. To provide employment for their community
   E. To show they had wanted to be artists themselves
3. Answer the following.
   a. **Identify** the statement that best defines a city-state.
      A. A city-state is an independent urban centre and surrounding countryside that is governed by powers outside its borders.
      B. A city-state is an independent urban centre that is governed by its own laws and political system.
      C. A city-state is an independent rural centre that is governed by its own laws and political system.
      D. A city-state is an independent urban centre and surrounding countryside that is governed by its own laws and political system.
      E. A city-state is a city within a larger country that abides by that country's laws.
   b. **List** the different ways city-states were governed during the Renaissance.
4. Circle the correct options to complete the sentence. Patrons were important in the spread of changes and ideas of the Renaissance because **farmers** / **artists** / **bankers** / **families** and intellectuals **told each other about new ideas** / **competed for the same work** / **moved from place to place in search of a patron**.
5. **Imagine** that you are studying at a university during the Renaissance and write a diary entry **describing** your reaction to the arrival of the Greek scholar Manuel Chrysoloras.

ANALYSE AND APPLY

6. **Examine SOURCE 1**. **List** the states that were:
   a. republics
   b. kingdoms or duchies (ruled by dukes)
   c. controlled by the Pope.
7. Read **SOURCE 2** and **identify** what Bruni believes are the most important qualities of a city. Leonardo Bruni was the chancellor of Florence at the time he wrote his description. **Discuss** whether this information impacts your assessment of the reliability of the source. Provide reasons for your answers.
8. Many wealthy noble and merchant families sent their sons to university. **Evaluate** the benefit of a university education during the Renaissance.

Answers and sample responses for this topic are available online.

LESSON 5.4 Why is Florence called the cradle of the Renaissance?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **describe** the impact of wealth on different groups in the city of Florence
- **describe** the relationships between the rulers and the ruled in Florence.

Tune in

Florence is a city located in central Italy that was a busy trading city during the Renaissance.

SOURCE 1 A nineteenth-century copy of the Pianta della Cantena, a woodcut made about 1470, showing Florence at the height of the Renaissance

Examine **SOURCE 1** and discuss possible reasons why most buildings were built inside the city walls.

5.4.1 New industries

The city of Florence played a leading role in the development of the Renaissance and has been described as 'the cradle of the Renaissance'. It was a busy trading city, with many people and products passing through each day. In the fifteenth century, Florence had a population of 60 000.

Florence is located on the banks of the river Arno, which was important for the cloth industry. The city, surrounded by walls, controlled much of the surrounding countryside. The city made use of its local produce, such as oil and grain, to feed the population, and provided work for people from the nearby villages. Previously, wealth had been based almost entirely on land ownership. However, during the Renaissance, the main sources of wealth were banking, trade, craft goods and cloth manufacturing. Individual experience varied greatly in the republic. In the fifteenth century the wool industry employed over 30 000 workers. Many of these workers were so poor that they were classified as *miserabili* because they owned so little that they paid no tax. Many of the jobs in the wool and silk industries were low-paid, difficult and unpleasant jobs. For example, one part of the manufacturing process involved stamping on the wool in large vats containing urine. On the other hand, the **merchants** who owned the cloth became very wealthy from the profits.

5.4.2 A guild government

Unlike some city states in Italy, Florence was not ruled by one individual — it was a republic. In Florence there were many councils, each with a separate role. In 1293, a new law called the Ordinances of Justice changed the rules about who could participate in government. To be eligible to vote or have a position in the political bodies, you had to be male, a citizen, a taxpayer and a member of a **guild**; therefore, nobles were officially excluded. In Florence during the Renaissance there were seven major and 14 minor guilds divided according to profession. Despite its republican institutions, most of the Florentine population were excluded from guild membership and therefore the political system.

5.4.3 The popolo grasso and the popolo minuto

As we have seen, the benefits of economic developments and political representation were not enjoyed by all groups in Florentine society. The Florentines described wealthy merchants and businesspeople as **popolo grasso** (the fat people) and the operators of small shops and merchants as **popolo minuto** or small people.

In 1378, a group of wool carders called **Ciompi** protested at their high taxes and low wages, which had forced some workers out of their homes. Significant numbers of labourers had moved from the surrounding villages into the city and had become indebted to their employers due to forced loans. The Ciompi were amongst those who accounted for 22 per cent of the population, but had no political representation. The group, which included other occupations such as shopkeepers, demanded the creation of three new guilds. Their creation resulted in a more representative government, with a wool carder, Michele di Lando, elected *Gonfaloniere* of Justice, a role similar to the that of the chief magistrate of state. However, the guilds only lasted for three and a half years and were dissolved in 1382, with a return to **oligarchical** government.

SOURCE 2 Adapted from the chronicle attributed to Acciaioli, in *Chronicles of the Tumult of the Ciompi*, ed. and trans. Kantor and Green, 9

On Sunday, all the guilds gathered in their shops. They elected representatives, one for each guild. On Monday morning the colleges assembled early in the signoria, and the representatives came. All that day they stayed with the priors, but they could not reach agreement. Thus, on Tuesday, the guilds began to arm themselves, the guild banners were unfurled. This was brought to the attention of the priors. They immediately chose the ninety-six. Then an uproar arose in the square and people with the guild banners shouted, 'Long live the people.'

SkillBuilder discussion

Causes and consequences

1. What do you think were the causes that led the guilds to begin arming themselves and rallying with banners, as described in **SOURCE 2**?
2. How was the formation of new guilds a consequence of the Ciompi Revolt?

SOURCE 3 Machiavelli, *Florentine Histories*, trans. Banfield and Mansfield, 126.

'The three new guild corporations be formed, one for the carders and dyers, another for the barbers, double makers, tailors, and such mechanical arts, and the third for lesser people; and that from these three new guilds there would always be two Signori and from the fourteen lesser guilds three.'

Did you know?

Florentines were so concerned about the possibility of one person taking control of the city that they created rules for election to office, including using bags to draw out names at random and voting using coloured beans for anonymity.

5.4.4 The Medici family

Despite the efforts of Florentines to share power between all eligible families, the government was dominated by the wealthiest merchant families. These families used a network of friends and family to influence politics in the city. The most famous of these was the Medici family. The wealth of the family came mainly from the Medici Bank. In the mid-fifteenth century Cosimo de' Medici came to dominate Florentine politics; however, he took care to ride a donkey in the city in order not to attract jealousy. Cosimo continued to influence Florentine politics until his death in 1464. The Medici family were important figures in Florence, their influence continuing under Cosimo's son Piero and then his grandson Lorenzo. The influence of the family ceased for a time with the banishing of Piero the Younger from Florence in 1494, when the Florentine government was angered because he made a deal on their behalf with the French to surrender the city. The Medici family returned to Florence in 1512 and established themselves as dukes of the city.

SOURCE 4 Niccolò Machiavelli wrote about Cosimo de' Medici in his *History of Florence*.

Although he was the chief man in Florence, he never overstepped the bounds of prudence . . . he never appeared anything but a simple citizen.

SkillBuilder discussion

Using historical sources

1. What can we infer about the historical context of Benozzo Gozzoli's *The Journey of the Magi to Bethlehem*, painted around 1459?
2. How does the depiction of the *Magi* reflect Florence's political or cultural influences in the fifteenth century?
3. What Renaissance techniques did Gozzoli use in this fresco, and what do they reveal about that era?

SOURCE 5 *The Journey of the Magi to Bethlehem*, from the east wall of the Chapel of the Palazzo Medici Riccardi, Florence, by Benozzo di Lese di Sandro Gozzoli, c.1459

SOURCE 6 Pope Pius II writing about Cosimo de' Medici

. . . not so much a citizen as the master of his city. Political councils were held at his house; the magistrates he nominated were elected; he was king in all but name and state.

SOURCE 7 Alessandro Strozzi wrote about the great influence Cosimo de' Medici had over Florence.

Whoever keeps in with the Medici does well for himself.

5.4.5 Cultural patronage

The wealthy merchants of Florence were among the first people in Italy to have an interest in the classical world and played an important role in the Renaissance as patrons. They paid for a range of work to be created for churches, public buildings and private collections. Cosimo de' Medici was a great patron of Humanists, artists, sculptors and architects. He gave money to Humanist thinkers Poggio Bracciolini and Marsilio Ficino, and commissioned the translation of Diogenes Laertius's *Lives and Opinions of Eminent Philosophers*.

Both Donatello's *David* and *Judith and Holofernes* were commissioned by Cosimo for his palace. He also paid for work on several churches in Florence, including the Church of San Marco. Cosimo's grandson Lorenzo de' Medici was also a great patron and commissioned a range of work, including Sandro Botticelli's *Primavera*.

In the early Renaissance, the patron and not the artist decided many of the details of a work. This could include selecting the content, composition and colours in a painting. For this reason, the patron was often considered the creator of a work.

The banker Giovanni Rucellai commissioned Leon Battista Alberti to create the facade of the church Santa Maria Novella. In the inscription on the facade, Rucellai names himself as the maker of the work. Many wealthy merchant families built their families new palaces in the new Renaissance style, with balance and symmetry, such as the Strozzi Palace in **SOURCE 8**. Rucellai wrote that his spending on architecture reflected 'his desire to honour God and his city and in memory of himself'.

SkillBuilder discussion

Continuity and change

1. How does the construction of the Strozzi Palace represent a change in the way wealthy families built their homes in Florence?
2. What does demolishing previous buildings for the Strozzi Palace suggest about changes in Florence?

Did you know?

Girolamo Savonarola was a Catholic priest who accused political and religious leaders of being corrupt. He was also very critical of the classical influences in literature, art and sculpture, which he described as pagan. He was particularly critical of the Medici family, who he thought were taxing the poor of Florence too heavily. He encouraged his followers to burn items he regarded as sinful, such as books, art and luxury items in the 'bonfires of the vanities'. He was later hanged and burnt for his criticism of the Church.

SOURCE 8 The Strozzi Palace was begun in 1489 by Benedetto da Maiano for Filippo Strozzi. Filippo bought and demolished many buildings on the site to make enough space for the new palace, but he did not move from the site of his family's original house.

5.4 SkillBuilder activity USING HISTORICAL SOURCES

In 1427 the Florentine Republic introduced a new taxation system, called the Catasto, to raise revenue for a war against the Visconti of Milan. The Catasto was based on the household with the assessment recorded in the name of the senior male. The information collected included the name, occupation and assets of all members of the household. Assets included property, investments, livestock, slaves and items of value. The Catasto assessed the wealth of over 40 000 people and determined how much tax was due. In addition, there was also a 'head tax' levied on each male between the ages of 18 and 60. Those who possessed neither property nor capital were exempt. Neighbours were rewarded for reporting people who understated their income.

1. Use the **1427 Catasto** weblink in the Resources panel to search the online records of the 1427 Catasto. Search the surname of a Florentine.
2. **Record** the financial assessment of your individual. Based on these figures, **determine** whether they could be regarded as wealthy.
3. **Suggest** the problems with reporting which might reduce a tax levy.
4. **List** the information that might be available in the Catasto records of 1427. Now **list** the information which may not be accurately reported or missing from the records. Review your notes and **evaluate** the usefulness and reliability of the Catasto records of 1427 for historians studying the Renaissance.

5.4 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5, 6	7, 8, 9, 10

REMEMBER AND UNDERSTAND

1. **Determine** if the following statements are True or False.
   a. Everyone living in Florence in the Renaissance could participate in government.
   b. Like other city-states, Florence was ruled by one individual.
   c. Patrons, rather than the artists, were often considered the creators of a work of art.
   d. In the fifteenth century, the wool industry employed around 10 000 workers and most of those workers were quite wealthy.
2. **Identify** the checks and balances that were put in place by the Florentine government to prevent one individual from becoming too powerful. **Select** all that apply.
   A. Political power was shared between many eligible people, rather than having one leader.
   B. You had to pay tax and be male, a citizen and a member of a guild to vote.
   C. The names of eligible men were drawn out of bags, supposedly at random, and voting was anonymous.
   D. There were several government bodies, each with a separate role, so that no one council could exercise complete power without the other councils.
   E. As members of the nobility were rich, they automatically had the right to vote.
3. **Elaborate** on what life was like for most people in Florence.
4. The majority of the population in Renaissance Italy worked in _____ jobs. The conditions for their work were often cramped, poorly ventilated and _____. These workers and their families rented their homes and lived in _____ conditions.
5. **Explain** how a patron might influence the nature of an artwork.

ANALYSE AND APPLY

6. **Analyse SOURCE 1**.
   a. **Explain** which buildings were most important in the city.
   b. **Examine** the buildings closely and suggest what some of the identifiable ones may have been used for.
   c. **Suggest** what the river Arno may have been used for during the Renaissance.
7. Read **SOURCE 2** and **outline** the methods used by the Ciompi to change the distribution of political power in Florence.
8. Read **SOURCE 3** and **describe** the changes in the distribution of political power because of the Ciompi Revolt.
9. Read **SOURCES 4**, **6** and **7** and explain how Cosimo de' Medici's political power was regarded by his contemporaries.
10. **Examine SOURCE 5**. It is a painting of the three wise men who visited Jesus at his birth.
    a. **Suggest** why Cosimo de' Medici has placed himself in a painting of this biblical scene.
    b. **Explain** which elements of the painting suggest that Cosimo de' Medici was a wealthy man.
    c. **Explain** what he is trying to suggest about himself by adding himself to the painting.

Answers and sample responses for this topic are available online.

LESSON 5.5 How did Venice contribute to the Renaissance?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **explain** the economy of Venice during the Renaissance
- **explain** the political institutions of Venice during the Renaissance.

Tune in

The city of Venice was built on a lagoon and had streets of water. People moved around the city on foot or by boat.

SOURCE 1 Boats still travel along the Venice canals today.

Examine **SOURCE 1** and suggest how Venice's watery streets would impact the sights and sounds of the city.

5.5.1 A city built on a lagoon

Venice was a republic governed by wealthy merchants. By the thirteenth century, it had become a strong naval power and a centre of trade at the crossroads between Europe, Asia and the Middle East.

From humble origins on a lagoon in the Adriatic Sea, Venice grew to be one of the richest and most powerful city-states in Italy. The city is built on marshy islands so that the buildings appear to rise from the sea. The early Venetians were fishers and sailors. They traded fish and salt for the products they could not grow.

By the fifteenth century, Venice had a trading network that went in all directions, as you can see in **SOURCE 2**. They had ports down the Adriatic coast through the Greek islands to Egypt, the Far East, Constantinople and the Black Sea. Venetian ships brought timber, grain, salt, fruit and wine from the Mediterranean. From the East, they brought silks, spices, drugs and jewels. People came great distances to do business in Venice. Many people came to live in Venice to do business, including Greeks, Albanians, Turks and Germans.

Cardinal Bessarion, himself from Greece, was one of many immigrants who came to live in Venice. In a letter from 1468, he said, 'As all peoples of almost the entire world gather in your city, so . . . do the Greeks.'

SOURCE 2 Map of the Venetian sea-trade routes

Source: Adapted from Patricia Fortini Brown, The Renaissance in Venice, pp. 12–13, The Everyman Art Library 1997. Map drawn by Spatial Vision.

SkillBuilder discussion

Continuity and change

1. Discuss how Venice's trading network changed by the fifteenth century?
2. What aspects of Venice's trade show continuity with earlier trading practices?
3. How did the arrival of people from different regions reflect changes in Venice's economy and society?

SOURCE 3 Venetian nobles were not allowed to call their home a palace. They had to call it a *ca'*, short for *casa*, a house.

5.5.2 Shipbuilding

In order to trade, the Venetians built large ships or galleys. Shipbuilding was so important to the economy that it was controlled by the government. By 1560, Venice was the largest industrial site in Europe, employing over 2000 workers. The Venetians used standardised parts for easy replacement. In times of emergency, a ship could be built very quickly. In 1570, 100 ships were built in two months. Because shipbuilding was so important, the craftsmen were given special pay and conditions. This included ceremonial roles like being bodyguards to the head of the Republic of Venice. However, the **arsenalotti**, as they were known, were not allowed to leave Venice, because they might share the secrets of Venetian shipbuilding.

SOURCE 4 A Spanish visitor's description of a Venetian ship filled with supplies

Out came a galley towed by a boat and from the windows they handed rope from one, bread from another, arms from another . . . and when the galley reached the end . . . all the necessary men were on board.

5.5.3 The Republic of Venice

Venice was a republic from 1297 until 1797, when the city surrendered to Napoleon. During this period, Venetians enjoyed relative political stability. In 1297, a law was passed declaring that only men whose families had their name in the *Book of Gold* were eligible for political office. Although they were called nobles, these men earned their income from trade.

All eligible men over the age of 30 were expected to sit in the Great Council when they were in Venice. The Great Council was the first level of Venetian government. Its main function was to elect the other councils. The Venetian government was made up of several councils, each with its own function.

The head of the Venetian government was called the Doge. The Doge was elected through a very complicated process. He could do very little by himself. In fact, he was not allowed to open his own mail or receive visitors alone. This was to prevent him from becoming too powerful.

Both Venice and Florence were ruled by rich merchants who were determined to limit the power of individual men and families. Therefore, they used complicated voting to prevent vote rigging and multiple councils to spread the power of office.

Venetians and their visitors were impressed by the beauty of the city. They admired its canals, richly adorned buildings, thriving economy and diverse population. Art, architecture and sculpture were paid for to enhance the image of the republic. Titian, Tintoretto, Veronese, Sansovino and Palladio all produced works that glorified Venice. Priuli said that Venice appeared to be 'built more by divine will than human hand'.

SkillBuilder discussion

Using historical sources

1. What does the image of Juno and Venice tell us about how Venice wanted to be seen?
2. Discuss how this painting shows the link between mythology and political propaganda in Venice?
3. Why might Venice be represented as a woman in this artwork?

SOURCE 5 *Juno bestowing gifts on Venice* by Paolo Veronese, 1553–1554. The figure above is the ancient Roman goddess Juno and she is showering gifts on Venice, who is represented as a woman.

Did you know?

Festivals were used to affirm the image of the state. For example, during the Ascension Day celebrations, the Doge dropped a gold ring into the sea and declared, 'We wed you, sea, in token of true dominion.'

5.5 SkillBuilder activity HISTORICAL PERSPECTIVES AND INTERPRETATIONS

1. a. Read the interpretation of Lane in **SOURCE 6** and **describe** double-entry bookkeeping.
   b. According to Lane, **explain** how this financial practice assisted Venice merchants to trade.
   c. According to Lane, **explain** how the introduction of double-entry booking changed the habits of merchants.
2. Read **SOURCE 7**. **Analyse** the suggested reasons for the spread of double-entry bookkeeping.
3. Double-entry bookkeeping was used by other Renaissance merchants and bankers. Think carefully about your search terms and use the internet to **research** the impact of this accounting practice on the expansion of the Medici Bank.

SOURCE 6 Frederic C. Lane, *Venice: A Maritime Republic*

The use of resident agents instead of travelling merchants was facilitated by number of improvements in commercial technique. One was the system of double-entry bookkeeping. This way of grouping and checking the records of every transaction made it easier for a resident merchant to keep track accurately of what his partners or agents were doing. Tradition has assigned its invention to Venice: but . . . earlier examples have been found in Genoa and Tuscany. The Venetians seemed to have been responsible for . . .

features of arrangement, for example the placing of all debits on the left, credits on the right in parallel columns. Bookkeeping and arithmetic, using Arabic instead of Roman numerals, was taught in Venice by 'masters of the Abacus'. . . This kind of bookkeeping enabled a merchant operating simultaneously on many marketplaces to know the extent of his liabilities and . . . of his assets.

Andrea Barbargio . . . bought standard commodities, such as cotton, wool, spices, copper or cloth. He kept his books carefully in double entry . . . He had been aboard in his youth, but for years he never went further than the Rialto. He had to go there to make payments and above all collect the news.

SOURCE 7 Geofrey T. Mills, *Early accounting in northern Italy*

Double-entry developed in three Northern Italian city-states between approximately 1200 and 1350. The need for a new accounting system stemmed from the economic forces of the commercial revolution. From Northern Italy, double-entry spread along European trading routes to other commercial centers through demonstration and the use of new business manuals from the printing industry. The increase in economic activity was fueled by commercial contacts from the Crusades, advancements in agriculture and trade, population growth and the rise of urban areas.

5.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5	6, 7, 8, 9, 10

REMEMBER AND UNDERSTAND

1. **Determine** if the following statements are True or False.
   a. It was necessary for Venetians to trade goods with surrounding communities.
   b. The High Council was the first level of Venetian government.
   c. The Doge was not allowed to open his own mail or receive visitors alone.
   d. Each Venetian ship was unique and custom-made.
2. How did the Venetian government try to control the *arsenalotti*?
   A. By not allowing them to leave Venice
   B. By cutting out their tongues
   C. By threatening to take away their children
   D. By torturing them
3. **Explain** why shipbuilding was important in Venice.
4. **Select** the correct options to complete the sentence.

   The Venetians made **standardised** / **unique** / **colour** / **shape** / **plastic** / **glass** ship parts, which were the same size and **standardised** / **unique** / **colour** / **shape** / **plastic** / **glass**, so that a part could always be quickly replaced.
5. **Explain** why the city of Venice was admired.

ANALYSE AND APPLY

6. **Imagine** that you have recently arrived in Venice to do business. **Write** an account of your time in the city.

   Describe the city, including the other people and the types of goods being traded.
7. **Examine SOURCE 3**. **Elaborate** on the values the Venetian government was trying to promote by preferring the word *casa* to *palace*.
8. **Explain** what we learn from the Spanish visitor in **SOURCE 4** about how the galleys were loaded.

EVALUATE AND COMMUNICATE

9. a. Study **SOURCE 5**. Identify the gifts Juno is giving to Venice.
   b. **Discuss** the symbolism of each gift.
10. Examine **SOURCE 2**.
    a. **Outline** what was traded by the Venetians in each location.
    b. Note the locations of the Venetian ports along the trade routes. **Propose** why the Venetians may have needed these ports along their trade routes.

Answers and sample responses for this topic are available online.

LESSON 5.6 What was it like to live during the Renaissance?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** the different perspectives of men and women during the Renaissance
- **describe** the impact of wealth on education and daily life.

Tune in

The *piazza* was a large open space where people gathered to shop, socialise and conduct business.

SOURCE 1 *Piazza del Mercato Vecchio, Florence* (The Piazza of the Old Market) by Jan van der Straet, 1555

1. **Identify the activities you can see in SOURCE 1.**
2. **In your opinion, how does the society you live in influence your individual experience?**
3. **Discuss the factors that may influence individual experience.**

5.6.1 Daily life

The experience of daily life varied considerably between different social groups in Renaissance society. An individual's experience was influenced by wealth, gender and location. The wealthy nobles and businesspeople enjoyed luxurious housing with expensive personal items and a rich diet. The shopkeepers and craftsmen owned some property and tools. Day labourers lived in small rented homes and with few possessions. Peasants worked the land, often as sharecroppers, and lived in one-room homes in the countryside.

5.6.2 The importance of family

Many institutions were important during the Renaissance. Family was an important source of comfort and support. For many people, their family provided guidance, advice and connections. As recommendations were essential, people also depended on their family and friends to make introductions for them. For the merchant families, these networks were necessary for conducting business. For the working class and women, networks allowed them to develop new friendships and ask for favours. Local identity and relationships were very important in the Renaissance.

5.6.3 The role of the Church

The Catholic Church continued to play an important role in most people's lives in Italy during the Renaissance. Significant occasions like birth, engagement, marriage and death were usually marked in the parish church.

Throughout the year, numerous religious feasts and festivals were held, expressing religious devotion and pride in the city-state. The Pope was the head of the Catholic Church. He was also a powerful political figure with his own army. Although most people accepted the Church's teachings, some began to question instances of abuses of power and corruption within the Church.

SOURCE 2 Ascension Day celebrations in Venice, as described by Petrarch

The size of the multitude is . . . hard to believe; both sexes and every age and station were represented. The Doge himself with a great bank of leading men.

5.6.4 Women in Renaissance Italy

Renaissance Italy was a patriarchal society that favoured men. Women generally received a limited education that prepared them for tasks in the home. However, there were exceptions. Some men educated their daughters and trusted their wives with important tasks like managing the estate while they were away on business. The women of noble or merchant families tended to be restricted to the home, while poorer families could not do without the work of women. These women often worked as servants, spinners or leatherworkers. For women from wealthy families, the parish church was a welcome outlet for socialisation.

Many of the decisions in the lives of Renaissance women were made by their male relations. For the wealthy, marriage was a chance to form alliances between two families and the match was a family decision. For example, Cosimo de' Medici was married to Contessina Bardi, who was from an old Florentine family. The bride and groom often spent very little time with each other until the ceremony. Women were usually married between the ages of 15 and 19. Men tended to marry in their mid-twenties or later. Nannina de' Medici wrote in frustration to her brother Lorenzo, 'Don't be born a woman if you want to have your own way.'

SOURCE 3 Diary of Florentine merchant Buonaccorso Pitti

I resolved to get married. Since Guido di Messer Tommaso was the most respected and influential man in the city, I decided to put the matter in his hands and leave the choice of bride up to him.

In order to marry, a woman needed to have a **dowry**. As a woman could not marry without a dowry, wealthy individuals donated dowries to poor girls in their city.

However, some girls from poor families had to work for years to earn enough to marry. Women had few options outside of marriage. Some became nuns, but even a convent required a dowry. Some women without family who could help them were forced into prostitution. The dowries of merchant women became so large that noble- and businesswoman Alessandra Strozzi declared, 'Whoever takes a wife wants money.'

5.6.5 Childhood in Renaissance Italy

Life was short in Renaissance times, with few people living into their forties. Working-class houses usually had no more than two rooms, a bed, table and bench, and a few utensils. Yet in most families, a child was born every two years. In poorer families, particularly, most children did not live long enough to reach adulthood. Childbirth itself was so dangerous that it was common for women to make their wills before a baby was due to be born.

Peasant and artisan children usually had no formal education. In peasant families, children were put to work in the fields as soon as they were old enough to be useful. In artisan families, children would work alongside their fathers from an early age, with boys normally learning the father's trade through apprenticeships from about age 14.

It was only among the wealthy classes that childhood began to be seen as a period of freedom from the responsibilities of adult life. Upper-class boys usually attended colleges from around age 7 to 15, unless they had home tutors. Upper-class girls might attend a convent school until they were married or became nuns.

In all social classes, girls had less status than boys. Babies were often abandoned or left at orphanages because their parents had died, were unmarried or could not afford to keep them. The records of the city-states show that two-thirds of all abandoned babies were girls. To relieve the burden on poor families, many girls were sent out to work as servants in wealthy households. Although some were treated well by their employers, others suffered physical and sexual abuse, and the laws gave them little protection from such treatment.

SkillBuilder discussion

Communicating

Look carefully at **SOURCE 4**.

1. What activities do you see?
2. What does this source tell you about education for the wealthy?

SOURCE 4 This illustration appeared in a grammar text by Elio Donato and shows Massimiliano Sforza at school. Massimiliano Sforza was the son of the Duke of Milan, Ludovico Sforza, and he became duke himself in 1512.

5.6.6 Social minorities

Not all groups were treated equally in Italian society during the Renaissance. Non-Italians were often excluded in various ways, as were slaves, prostitutes and homosexuals. People of the Jewish faith were a vital part of Venetian society during the Renaissance, as Jewish bankers provided loans to the Venetian merchants. The financial services provided by these bankers were essential to the Venetian economy; however, as Christians, the Venetians had some prejudices about the Jewish culture. As a result, Jewish people were subjected to numerous unfair laws. In 1516, a law required all Jews to live in one location — a ghetto known as the Foundry. Jews were also subjected to a curfew that meant they had to be indoors at sundown. The Jewish community was made to pay for the walls of the ghetto and for the wages of Christian guards.

Did you know?

The term *ghetto* may come from the Italian *getto*, meaning foundry, or from *borghetto*, a small section of town.

5.6 SkillBuilder activity QUESTIONING AND RESEARCHING LUCREZIA BORGIA

Lucrezia Borgia was born on 18 April 1480, the daughter of Rodrigo Borgia and his mistress Vanozza Cattanei. Rodrigo was elected Pope Alexander VI in 1492. Lucrezia Borgia was married at the age of 13 to Giovanni Sforza, the lord of Italian cities Pesaro and Gradara. Her marriage to Giovanni only lasted three years, when Pope Alexander had the marriage annulled. She was soon married to Alfonso of Aragon, son of the King of Naples. They were married only a short time before her new husband was murdered, most likely at the hands of her brother, Cesare Borgia. Presently, her father arranged a marriage to Alfonso d' Este, the son of Duke Ercole. She remained married to Alfonso, dying after giving birth to her eighth child in 1519, aged 39.

1. **Propose** three questions you have about the life of Lucrezia Borgia. Consider the different periods in her life and ensure you cover several topics.

SOURCE 5 Hadrianius, Secretary to the Pope, recorded the decision of the Pope, Rodrigo Borgia, to make Lucrezia Borgia the regent of Spoleto.

Hadrianius, Secretary to the Pope

Given in Rome, in St Peter's, under the papal seal, August 8, 1499. Aged 19 her father, the Pope, made Lucrezia regent of Spoleto:

'Dear sons, we have entrusted to our beloved daughter in Christ the noble lady Lucrezia Borgia, Duchess of Biseglia, the office of keeper of the castle as well as the government of our cities Spoleto and Foligno. Having perfect confidence in the intelligence, the fidelity, and the probity of the Duchess. We trust that you will receive the Duchess…with all due honour as your regent and show her submission in all things.'

SOURCE 6 Johann Burchard's diary entry from 1501 recorded the decision of the Pope to appoint Lucrezia Borgia as his representative in his absence.

When Alexander left Rome in 1501, he left Lucrezia as his representative. Johann Burchard writes, 'before his Holiness, our master, left the city he turned over the palace and all the business affairs to his daughter Lucrezia, authorising her to open all letters which should come addressed to him.'

2. According to **SOURCE 5** and **SOURCE 6**, **identify** what powers were given to Lucrezia Borgia by the Pope. Use short quotes in your answer.
3. Refer to **SOURCE 5** and **describe** the character of Lucrezia Borgia. You may need to use a dictionary.
4. Based on your study of **SOURCES 5** and **6**, **evaluate** the extent to which Pope Alexander trusted the ability of his daughter.
5. Use the internet and your library and **investigate** the secular powers of the Pope during the Renaissance. **Outline** the territory controlled by the Pope and describe the methods he used to ensure his control.

In 2008 it was argued that the figure in **SOURCE 7** is Lucrezia Borgia. However, not all scholars agree. The dagger is suggestive of the ancient Roman Lucretia, who killed herself to protect her family's honour. There is also a myrtle bush that represented Venus, the goddess of love. In the foreground is the text 'brighter is the virtue reigning in this beautiful body', which is an adaption of text from Virgil's *Aeneid*.

SOURCE 7 Lucrezia Borgia, attributed to Dosso Dossi and Battista Dossi, in the National Gallery of Victoria, Melbourne

SOURCE 8 Ferdinand Gregorovius, *Lucretia Borgia: according to original documents and correspondence of her day*, 1909

During the time she lived in Rome [Lucrezia Borgia] was always subject to the will of others, for her destiny was controlled, first by her father and subsequently by her brother.

SOURCE 9 Diane Y.F. Ghirardo, 'Lucrezia's honour' in *The Borgia Family: Rumour and Representation*, 2020

Antonio Tebaldeo, Calcagnini and Giraldi sang of Lucrezia's beauty and virtue. Marcelle Filosseno compared her to Minerva and Venus in his sonnets. Jacopo Caviceo describes her as beautiful, learned, wise and modest . . . Ariosto praised her decorum. This much is certain: her life at Ferrara was regarded as a model of feminine virtue.

6. Based on your knowledge of Lucrezia Borgia's life, **evaluate** the perspective of Gregorovius in **SOURCE 8**. **Explain** to what extent you agree with his statement.
7. **Examine** the portrait of Lucrezia Borgia in **SOURCE 7**. **Analyse** the impression of her that is being presented. In your response, refer to specific aspects of the image and comment on their symbolic meaning.
8. **Evaluate SOURCE 7** (painted during her life at Ferrara) and **SOURCE 8**. **Summarise** the attitude towards Lucrezia Borgia as Duchess of Ferrara. Ensure that you support your arguments with specific references.

5.6 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2	3, 4, 5	6, 7, 8, 9, 10

REMEMBER AND UNDERSTAND

1. **Determine** if the following statements are True or False.
   a. The purpose of marriage for merchant families was to form an alliance with another family.
   b. The Pope was a powerful political figure with his own army.
   c. In Renaissance times, people generally lived into their fifties and sixties.
   d. People of the Jewish faith provided loans to the Venetian merchants.
2. **Identify** in what ways life was difficult for women during the Renaissance. **Select** all that apply.
   A. Most women received a limited education.
   B. Most women from noble and merchant families were largely restricted to the home.
   C. It was hard for women because they did not have many clothes to choose from.
   D. Women from poorer families often did difficult low-paid jobs in addition to their tasks at home.
   E. Women could not marry or enter a convent without a dowry.
   F. Many of the decisions about the lives of women were made by their male relatives.
3. Many people celebrated births, _____, deaths, religious feasts and _____ at the parish church. It played a very important role in people's lives during the Renaissance.
4. Relationships were very important in Renaissance Italy. Family and friends provided support and made introductions to others. **Explain** why these connections to others were necessary. **Select** all possible answers.
   A. For the working class and women, these connections were necessary for conducting business.
   B. For the working class and women, connections allowed them to develop new friendships and ask for favours.
   C. For the merchant families, these connections allowed them to develop new friendships and ask for favours.
   D. For the merchant families, these connections were necessary for conducting business.
5. a. **Outline** the restrictions that were placed on Jewish people in Venice during the Renaissance.
   b. **Reflect** on and **describe** the attitudes and values of the communities who created these restrictions.

ANALYSE AND APPLY

6. **Identify** what **SOURCE 2** reveals about the significance of the celebration of Ascension Day.
7. **Explain** how Nannina de' Medici might have been different from most Renaissance women. **Suggest** whether this makes her statement a less useful source for historians. Provide reasons to **justify** your answer.
8. Alessandra Strozzi declared, 'Whoever takes a wife wants money.'
   a. **Discuss** what this statement tells us about Renaissance attitudes to marriage.
   b. **Determine** whether Alessandra Strozzi is likely to be a reliable source about marriage in Renaissance Italy. **Explain** the attitude to marriage in **SOURCE 3**.

EVALUATE AND COMMUNICATE

9. **Examine SOURCE 4**, which appeared in a book describing the different parts of language, or grammar. **Propose** reasons why Elio Donato might have included Sforza in the image.
10. Write four questions a historian investigating the Renaissance could ask when **analysing SOURCE 2.**

Answers and sample responses for this topic are available online.

LESSON 5.7 How did art, architecture and sculpture change during the Renaissance?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **name** Renaissance artists and their artworks
- **describe** the changes in style and subject matter in art during the Renaissance.

Tune in

During the Renaissance, stories from the ancient Greeks and Romans were widely depicted across all forms of art.

SOURCE 1 An illustration from a medieval manuscript depicting the Three Graces (goddesses from Greek and Roman myths)

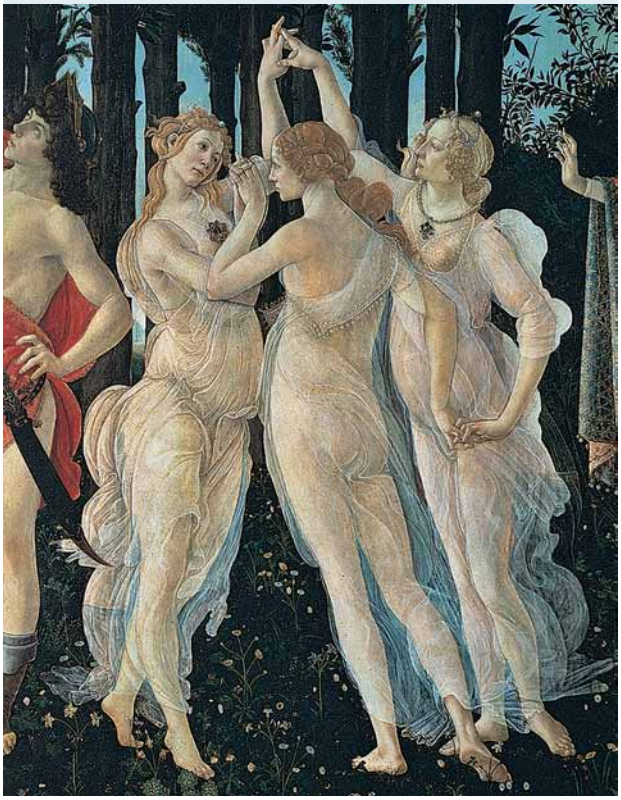
In small groups, brainstorm Renaissance artists and artwork. Keep your ideas to review at the end of the lesson. Then discuss in groups your favourite modern artists, including musicians, and explain why you like each one.

5.7.1 Renaissance painting and sculpture

Many people consider the Italian Renaissance artists, sculptors and architects to be among the greatest of all time. Among the most famous are Michelangelo Buonarotti (1475–1564), Leonardo da Vinci (1452–1519), Raphael (1488–1520) and Titian (1488–1576).

Renaissance artists created works that were different in style from most art of the medieval era (compare **SOURCES 1** and **2**). Artists experimented with technique, light and colour.

SOURCE 2 A detail from Sandro Botticelli's painting *Primavera* (c. 1482) showing the Three Graces



Unlike earlier artists, they used rich colours and tried to show depth in scenes by painting perspective and distance realistically. This gave their paintings the feeling of having three dimensions. Artists began to use oil paint, and many of them created **frescos** on buildings by applying paint to wet lime plaster.

Many medieval sculptures were shallow figures carved out of a background, known as relief sculptures. Renaissance sculptors were inspired by ancient Greek statues of the classical style that had developed in the fifth century BCE. They were also inspired by Roman statues that copied this Greek style. To achieve realism, Renaissance painters and sculptors used live models to create the figures in their works. They also studied **anatomy** to gain a better understanding of the human body.

Subject matter

Like medieval artists, Renaissance artists painted religious scenes, especially scenes depicting events in the Bible and the lives of saints. Many also worked on other subjects including scenes from Greek and Roman myths, landscapes and portraits, especially of their wealthy patrons.

Did you know?

Antonio del Pollaiuolo, who lived during the fifteenth century, was probably the first artist to dissect (cut up) human corpses to study anatomy. Leonardo da Vinci did the same and even discovered that hardening of the arteries was a cause of death in older people.

SkillBuilder discussion

Continuity and change

Consider how this ancient artwork (**SOURCE 3**) differs from the medieval figures in **SOURCE 1**. What has changed in the approach to the art and why might this be?

SOURCE 3 The classical sculpture shows the Trojan priest Laocoön and his sons being crushed to death by snakes. The sculpture was rediscovered in a vineyard in Esquiline Hill on 14 January 1506 and had a great impact on Michelangelo.

SOURCE 4 *Moses* by Michelangelo, 1515, was influenced by the rediscovered classical sculpture of Laocoön shown in **SOURCE 3**.

SOURCE 5 Michelangelo Buonarotti's famous *Pietà* (meaning 'pity'). The marble sculpture depicts Mary holding the body of her son Jesus Christ after his crucifixion.

5.7.2 Renaissance architecture

Like Renaissance sculptors, Renaissance architects were inspired by the reawakened interest in the knowledge and techniques of Ancient Greece and Rome. The remains of ancient Roman buildings with their Greek columns and Roman arches and domes stood in many places, especially in Italy. Architects copied their styles and techniques to design new buildings.

Among the most brilliant of their works is the dome of the Cathedral of Santa Maria del Fiore in Florence. During the Renaissance, the church was incomplete, as the dome was unfinished. In 1419 Filippo Brunelleschi (1377–1446) won a competition to build the dome. Brunelleschi was inspired by the dome on the Pantheon, but he devised unique solutions to the problem of constructing a dome of such size. He used a herringbone design and a double skin. His completed dome is considered one of the greatest architectural achievements of the Renaissance (see **SOURCE 2** in lesson 3.2).

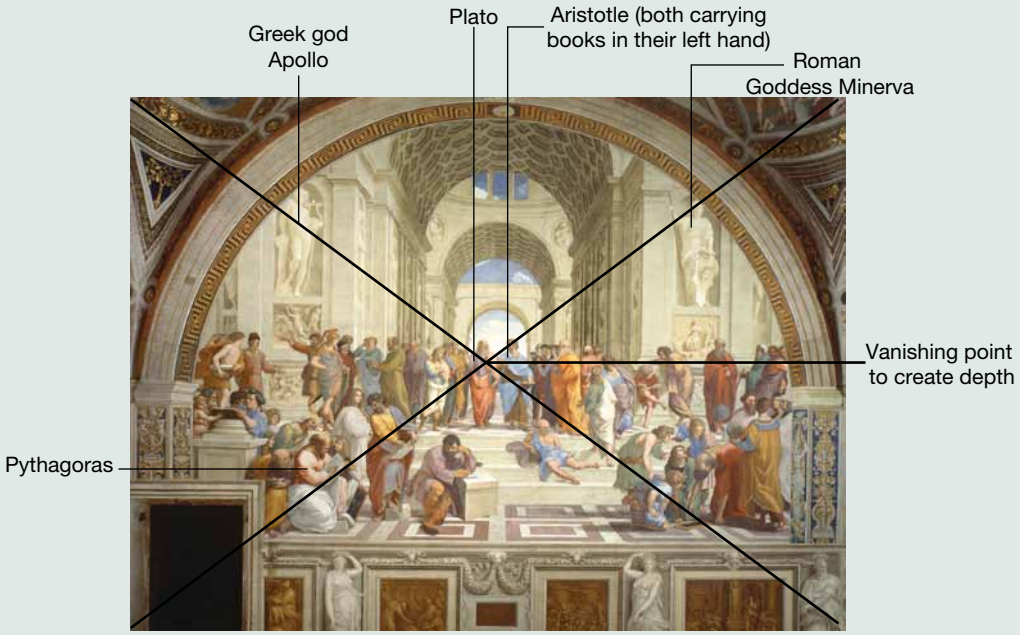
Did you know?

By the sixteenth century, Humanist influence made it possible for a few women from the upper classes to study painting. Although women were barred from academies where male nudes provided models, some women managed to become successful artists. Among them were Sofonisba Anguissola, Marietta Robusti (the daughter of the famous artist Tintoretto) and Caterina dei Vigri, a nun.

5.7 SkillBuilder activity HISTORICAL PERSPECTIVES AND INTERPRETATIONS

Examine **SOURCE 6**.

SOURCE 6 *The School of Athens* by Raphael, showing Plato and Aristotle in discussion in the centre of the painting



1. **Identify** the classical influences and Renaissance characteristics. Pay attention to the use of perspective, the use of columns and arches, the presentation and identity of the figures and the style of dress.
   a. **Investigate**, using the internet or your library, to find another Renaissance artwork, sculpture or building. You may search using the names in the lesson.
   b. **Identify** the Renaissance characteristics of the work (consider both style and subject matter).
   c. **Annotate** an image of the work with specific reference to selected parts.
   d. **Present** your findings to your class or a peer.

5.7 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5	6, 7, 8, 9, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following is True or False. Renaissance artists studied human anatomy to understand the human body and paint it or sculpt it more realistically.
2. **Explain** what subject matter Renaissance artists included in their work. **Select** all that apply.
   A. Their favourite pets
   B. Portraits
   C. Lives of the saints
   D. Their houses and palaces
   E. Places they had travelled to
   F. Events of the Bible
   G. Landscapes
   H. Food they ate in restaurants
   I. Greek and Roman myths
3. During the Renaissance, artists experimented with technique, light and _____. Unlike earlier artists, they used rich colours and tried to show depth in scenes by painting perspectives and distances _____. This gave their paintings the feeling of having three _____. Artists began to use _____ paint and many of them created frescos on buildings by applying paint to wet lime plaster.
4. **Identify** the ancient styles that inspired Renaissance sculptors and architects. **Select** all that apply.
   A. Parallelograms
   B. Columns
   C. Triangles
   D. Dodecahedrons
   E. Domes
   F. Circles
   G. Arches
   H. Squares
5. **Explain** the process of painting a fresco.

ANALYSE AND APPLY

6. **Compare SOURCES 1** and **2**. **Identify** three differences between the styles of these two artworks using the following headings:
   - Depth and perspective
   - Realism
   - Colour
7. **Examine SOURCES 3** and **4**. **Explain** what evidence there is that Michelangelo was influenced by the discovery of *Laocoön*.
8. Look closely at **SOURCE 5**.
   a. **Describe** the details of the sculpture.
   b. **Communicate** the emotional effect of the sculpture.
   c. **Clarify** what would have been the difficulties of carving this out of a single piece of marble.

EVALUATE AND COMMUNICATE

9. **Determine** the effect of the changes in art, architecture and sculpture on the city-states of Italy.
10. **Summarise** what were the greatest changes in art, sculpture and architecture during the Renaissance.

Answers and sample responses for this topic are available online.

LESSON 5.8 Who contributed to the Scientific Revolution?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **name** important Renaissance thinkers
- **describe** the theories and inventions of the Scientific Revolution
- **outline** the significance of the theories and inventions of the Scientific Revolution.

Tune in

Information about the human skeleton greatly influenced scientific thinking and medical knowledge during the Renaissance.

Discuss how Andreas Vesalius' detailed anatomical illustration in **SOURCE 1** may have challenged traditional medical knowledge and contributed to the shift from medieval to modern scientific thinking?

SOURCE 1 An illustration of the human skeleton that Andreas Vesalius published in 1543

5.8.1 Renaissance thinkers

Andreas Vesalius (1514–1564)

Vesalius is often called 'the father of human anatomy' because of his contributions to understanding the human body. The Catholic Church banned people from dissecting human bodies. This meant that doctors had to rely on the writings of ancient Greeks such as Hippocrates and Galen for their understanding of anatomy. This made it very difficult to treat injuries and disease. Vesalius defied the Church and obtained permission from local law courts to dissect and conduct experiments on the bodies of people who had been executed. In 1543, Vesalius published a book of **anatomical drawings**, with explanations of how the various body parts worked.

Leonardo da Vinci (1452–1519)

Leonardo da Vinci was one of the most remarkable Italian Renaissance thinkers. He is most famous for his art, especially the *Mona Lisa* — arguably the most famous of all paintings. He conducted observations and experiments in biology, anatomy, geology, engineering, astronomy, mathematics and music. Leonardo was a great inventor. Among Leonardo's many designs were an underwater diving suit, a robot and a glider.

SOURCE 2 Adapted from Leonardo's letter to the Duke of Milan, requesting a job

'Most illustrious lord, I am emboldened to solicit an appointment of acquainting your Excellency with certain of my secrets. I can construct bridges which are very light and strong and very portable. In case of a siege, I can cut off water from the trenches and make pontoons and scaling ladders. I can demolish every fortress if its foundations have not been set on stone. I can also make a cannon which is light and easy of transport, causing the enemy to suffer heavy losses. I can make armoured wagons carrying artillery.

In time of peace, I can give you complete satisfaction in the construction of buildings both public and private, and in conducting water from one place to another. I can execute sculpture in marble, bronze, or clay, also in painting I can do as much as anyone else.'

Leonardo was appointed by the duke and held the job for 16 years.

SkillBuilder discussion

Continuity and change

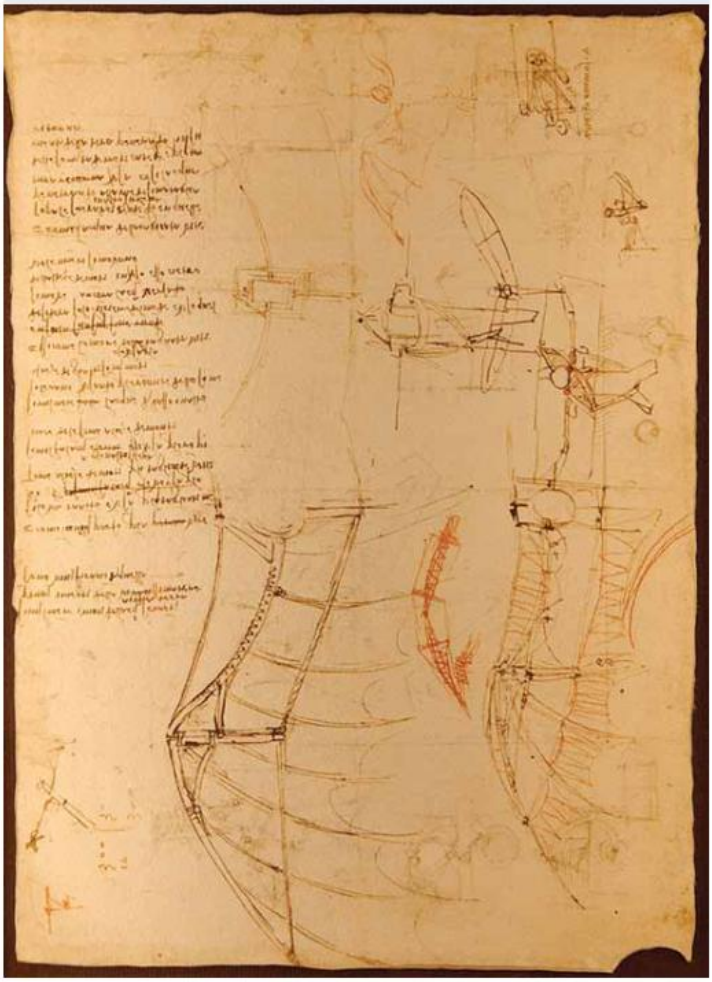
Study **SOURCES 2** and **3**.

1. Discuss how Leonardo da Vinci's request for a job from the Duke of Milan reflected the changing role of artists and scientists during the Renaissance.
2. What aspects of Leonardo's work, such as his inventions or observations of nature, show continuity with earlier Renaissance thinkers?

Did you know?

Leonardo da Vinci recorded his observations, ideas and inventions in over 4000 pages of notebooks. These can only be read with a mirror because Leonardo wrote everything backwards.

SOURCE 3 Leonardo da Vinci's sketch and instructions for building a glider



SOURCE 4 In 2002, Steve Roberts built a glider based entirely on Leonardo's sketches and instructions produced between 1490 and 1505. Roberts used only materials that would have been available in Leonardo's time. The glider reached 10 metres above the ground and flew for up to 17 seconds on its longest flight.

Nicolaus Copernicus (1473–1543)

Copernicus was a Polish astronomer who developed a theory that put the Sun, rather than the Earth, at the centre of the universe. The Catholic Church held the view that the Earth was the centre of the universe around which the Sun, Moon and planets revolved. This belief had come from the ancient Greek philosopher Aristotle and had been described by the Greek astronomer Ptolemy in the second century CE.

Copernicus spent many years investigating the movements of heavenly bodies and, in 1515, he sent copies of his findings to other astronomers. After further study, Copernicus published his theory in a book called *On the Revolution of Heavenly Spheres* (1543). Copernicus's model of the planetary system is called the heliocentric system. It states that the Earth revolves around the Sun in a year and rotates on its axis once every 24 hours.

Galileo Galilei (1564–1642)

Galileo was an Italian astronomer, physicist, mathematician, philosopher and inventor. He was a great supporter of the scientific method, and used it to conduct experiments, including investigating gravity at the tower of Pisa. Galileo found that objects fall at the same rate regardless of differences in weight. He used a telescope to carry out observations of the movement of the moon and other planets. He was a supporter of Copernicus's theory of heliocentrism, that argued the Earth rotated daily and revolved around the sun. Placing the Sun, rather than the Earth, at the centre of the solar system brought him into conflict with the Catholic Church, who declared him a heretic for his theories and placed him under house arrest.

SOURCE 5 Adapted from Sidereus Nuncius, published in 1610. Sidereus Nuncius (translated as Starry Messenger), published in 1610, was a groundbreaking astronomical work by Galileo Galilei.

Galileo wrote of his observations of the moons and planets: 'when I was viewing the constellations of the heavens through a telescope, the planet Jupiter presented itself to my view, I noticed that three little stars were near the planet; and although I believed them to be fixed stars, they seemed to be arranged exactly in a straight line, parallel to the ecliptic . . . When [the following night], I turned again to look at the same part of the heavens, I found a very different state of things, for there were three little stars all west of Jupiter, and nearer together than on the previous night. I therefore concluded that three stars are moving about Jupiter, as Venus and Mercury around the Sun.'

SkillBuilder discussion

Chronology

1. When was Sidereus Nuncius published, and what major scientific event did it contribute to during the early 17th century?
2. What key astronomical discoveries did Galileo report in Sidereus Nuncius. How did these discoveries challenge earlier views of the universe?
3. Discuss how the publication of Sidereus Nuncius in 1610 relates to the broader timeline of the Scientific Revolution.

5.8 SkillBuilder activity HISTORICAL PERSPECTIVES AND INTERPRETATIONS

1. **Select** one of the thinkers from the following list:
   - Konrad Gessner (1516–1565)
   - Sir Francis Bacon (1561–1626)
   - Johannes Kepler (1571–1630)
   - Gerardus Mercator (1512–1594)
   - William Gilbert, also known as Gilbard (1544–1603)
   - Isaac Newton (1643–1727)
   - Laura Bassi (1711–1788)
   - Maria Gaetana Agnesi (1718–1799).
2. **Conduct** research on your chosen thinker. Collect notes on one new theory that they put forward.
3. Clearly **explain** the theory or new idea. Then consider how this idea changed scientific thinking during the Renaissance. To do this you will need to **compare** the new idea with the previous ideas or theory.
4. **Write** your notes in dot points that include specific facts.
5. Use the following sentence stems to write an **explanation** of the contribution of your chosen individual.

(Insert the person's name) presented the new theory of _____ which was an important development in science/mathematics/technology. This idea was different from previous ideas because _____. This new idea impacted the Renaissance community by _____.

5.8 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	6, 7, 8, 9	4, 5, 10

REMEMBER AND UNDERSTAND

1. **Identify** three inventions of Leonardo da Vinci.
   - A. A glider
   - B. A car
   - C. An underwater diving suit
   - D. A vacuum cleaner
   - E. A hot water service
   - F. A lead for a dog
   - G. An oven
   - H. A shower cap

2. **Explain** the theory of Copernicus.
   A. The Earth moves around the Sun every 24 hours and the Earth rotates on its axis once every year.
   B. The Earth moves around the Moon.
   C. The Sun moves around the Earth once a year.
   D. The Sun moves around the Earth once every 24 hours.
   E. The Earth moves around the Sun in a year and the Earth rotates on its axis every 24 hours.
3. **Determine** if the following statements are True or False.
   a. Galileo used the scientific method to conduct experiments.
   b. Vesalius is often called 'the father of human anatomy' because he used to be a doctor.
   c. Copernicus believed that the Earth revolves around the Sun.
4. **Evaluate** what the careers of Galileo Galilei and Andreas Vesalius reveal about the role of the Church in scientific discovery during the Renaissance.
5. _____ was an Italian astronomer, physicist, mathematician, philosopher and inventor.

ANALYSE AND APPLY

6. Read **SOURCE 2**.
   a. **Identify** the skills Leonardo is offering to the Duke of Milan.
   b. **Infer** what these skills reveal about the needs of the duke.
7. **Demonstrate** how **SOURCES 3** and **4** support the claim that Leonardo da Vinci was a revolutionary thinker.
8. Study **SOURCE 4**. **Explain** why Vesalius was able to depict the human skeleton so accurately and why it had been difficult to create accurate anatomical drawings before his time.
9. **Analyse** the significance of Copernicus's theories for our understanding of astronomy.

EVALUATE AND COMMUNICATE

10. **Examine SOURCES 1** and **5**. **Evaluate** the extent to which the work of Andreas Vesalius and Galileo Galilei used the scientific method, which bases theories on observations and experiments.

Answers and sample responses for this topic are available online.

LESSON 5.9 How did the Renaissance spread?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** the spread of Renaissance culture to Northern Europe and beyond.

Tune in

Advancements in technology, such as the printing press in **SOURCE 1**, allowed Renaissance culture to spread throughout Europe.

SOURCE 1 A modern artist's impression of printers producing books on a fifteenth-century printing press

- **A** Metal letters, numbers and symbols called 'type' were arranged and rearranged side by side in rows held together by a frame to create each page of print.
- **B** A frame of type was then fixed onto the press and the surface of the type was covered with ink.
- **C** A press, adapted from a wine press for squashing grapes, was pulled down to press sheets of paper against the ink-covered type in the frame.
- **D** The press was raised and the printed pages were removed. The complete sets of pages were bound together to make a copy of a book.

Examine **SOURCE 1** and predict what is happening in the image. Working in pairs, identify one modern technological device. Discuss how this device is used today to spread culture across the world.

5.9.1 A widening movement

From about 1450, the Renaissance spread from Italy to Europe. Historians call this movement the Northern Renaissance. The ideas of the Renaissance were spread in several ways including via trade, the importation of art, Italian artists and architects moving to northern Europe for employment, northern European students attending Italian universities, and northern European writers and scholars who were influenced by Italian Humanism. But the most important reason for the spread of Renaissance ideas was the growing availability of printed books.

Influential scholars, such as Erasmus and Rabelais, spread Humanist ideas as they travelled. King Francis I of France brought in Italian artists, including Leonardo da Vinci, to paint for his court. From the middle of the fifteenth century, several Italian artists travelled to Poland. Ivan III of Russia brought in Italian architects to design Russian buildings. Young Hungarians studying in Italy returned with Humanist ideas and, in the late fifteenth century, the Hungarian city of Buda became an important centre of the arts with one of Europe's greatest collections of books.

The spread of the Renaissance was not just about the copying of Italian ideas but also the development of new ones. In northern Europe, the brothers Hubert and Jan van Eyck perfected techniques of painting in oils. In the Netherlands, the painter and printmaker Pieter Bruegel (1525–1569) followed Italian artists in depicting scenes from the Bible. An example is his famous *Massacre of the Innocents* (1565–67), which depicts the biblical story of King Herod's attempt to wipe out all young male children in ancient Bethlehem. Bruegel also explored ideas other than religion in his artwork, such as the horrors of war in his *Triumph of Death* (1562), and he went on to influence many artists through his landscapes and scenes of peasant life.

5.9.2 The English Renaissance

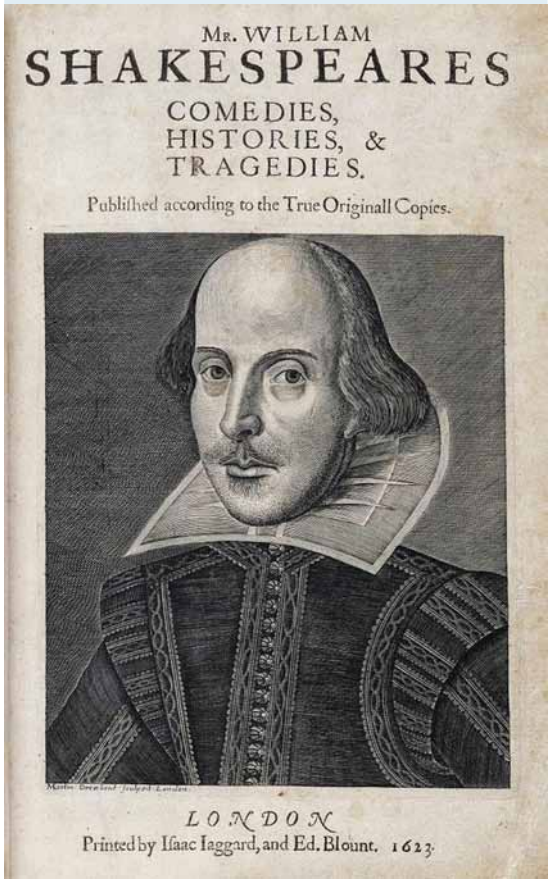
From the early sixteenth century, Renaissance culture flourished in England, especially through the works of poets such as John Milton and John Donne, and playwrights such as Christopher Marlowe and William Shakespeare. Of all the great figures of the English Renaissance, none has had a more lasting influence than Shakespeare. Shakespeare wrote 38 plays and 154 sonnets, many of which continue to be performed today.

SkillBuilder discussion

Historical significance

1. Make a list of some of Shakespeare's famous plays. Do you remember the plots?
2. How do you think Shakespeare's plays reflect the culture and new ideas of the time he lived in?

SOURCE 2 The title page of the first folio of William Shakespeare's plays, printed in 1623.


MR. WILLIAM
SHAKESPEARES
COMEDIES,
HISTORIES, &
TRAGEDIES.
Published according to the True Originall Copies.

LONDON
Printed by Isaac Iaggard, and Ed. Blount. 1623.

The printing press

No means of spreading Renaissance ideas was more important than the printing press. A form of printing with movable type had been used in China since the late tenth century, but the first European printing press was developed in Germany between 1440 and 1452 by Johannes Gutenberg (1398–1468), a goldsmith. Before Gutenberg's press, books had to be copied by hand or printed from wooden blocks on which each letter had to be hand-carved. This process was very time consuming and therefore very expensive.

Gutenberg's press used movable metal type. This enabled books and pamphlets to be mass-produced so that ideas could circulate widely. Books were generally printed in Latin because it was the international language of scholars. They were also printed in the various languages used by the peoples of Europe. The first book produced on Gutenberg's press was the Gutenberg Bible, which was completed in 1456.

Did you know?

A Renaissance printing press could produce 3600 pages in a day. It has been estimated that more than 20 million copies of books had been produced on printing presses by 1500. By the late sixteenth century, ten times as many books had been printed.

5.9 SkillBuilder activity HISTORICAL PERSPECTIVES AND INTERPRETATIONS — COMMUNICATING

Evaluate the claim that the most important reason for the spread of Renaissance culture was the invention of the printing press.

To determine the impact of one historical factor, historians ask questions about the nature and scale of the consequence.

1. Ask and answer questions about the impact of the printing press on the spread of the culture of the Renaissance.
   a. **Identify** the short-term effects of the printing press.
   b. **Describe** the nature of the effects (consider social, cultural and economic effects).
   c. **Determine** the scale of the impacts. **State** how many people or areas of life were impacted.
2. **Evaluate** the claim: **consider** whether any other factor had a similar or greater impact on the spread of the Renaissance.
3. **Communicate** your findings: present your ideas in a logically written paragraph.

5.9 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4	5, 6, 8	7, 9, 10, 11

REMEMBER AND UNDERSTAND

1. **Determine** how books were printed before using the printing press.
   A. They were photocopied.
   B. Images were taken of the text and then added together.
   C. There were no books before the printing press.
   D. They were made by hand.

2. **Determine** if the following statements are True or False.
   a. Johannes Gutenberg developed the first printing press.
   b. Historians call the spread of the Renaissance from Italy to Europe the 'Southern Renaissance'.
   c. The first book produced on Gutenberg's press was the Gutenberg Bible.
3. Young Hungarians studying in Italy returned with Humanist ideas and, in the late fifteenth century, the Hungarian city of _____ became an important centre of the arts with one of Europe's greatest collection of books.
4. **State** how many pages a Renaissance press could produce in a day.

Artists	Trade	Students	Scholars

5. **Match** how trade, students, scholars and artists contributed to the spread of Renaissance culture. You may use each word more than once.

Standardising ship-building parts	
Importing silk	
Employed by wealthy people and rulers in northern Europe	
Moving from place to place and bringing books and ideas with them	
Importing art	
Attending university and hearing of the new ideas	
Importing grain	

ANALYSE AND APPLY

6. **Examine SOURCE 1** and **explain** why the Renaissance printing press allowed books to be produced faster.
7. **Explain** how traders, students, scholars and artists contributed to the spread of Renaissance culture.
8. **Evaluate** the claim that the most important reason for the spread of Renaissance culture was the invention of the printing press.
9. **Identify** the changes in the culture of the Renaissance as it spread from Italy to the rest of Europe.

EVALUATE AND COMMUNICATE

10. **Consider** the patrons who helped to spread the ideas of the Italian Renaissance. **Discuss** whether wealth was an important factor in encouraging the ideas of the Renaissance. Back up your opinion with evidence.
11. **Rank** in order of significance the factors that spread the ideas of the Renaissance. Provide reasons to **justify** the choice of most important factor.

Answers and sample responses for this topic are available online.

LESSON 5.10 What were the Reformation and Counter-Reformation?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** the key changes of the Reformation
- **explain** the key ideas of Martin Luther.

Tune in

The events of the Reformation were portrayed in many ways by Renaissance artists.

SOURCE 1 A woodcut by Jorg Breu, c. 1530, showing the Pope's representatives selling indulgences to Catholic townspeople

Examine **SOURCE 1** and its caption and suggest what is happening in the image. What do you think 'selling indulgences' might mean?

5.10.1 Luther challenges the Church

As the name suggests, the Reformation began as a series of unrelated attempts to reform the Catholic Church. The people who made these attempts were called Protestants, because they were protesting a specific aspect of the Catholic Church. Protestants believed in the central place of the Bible in

determining Christian **doctrine** and that the Bible should be translated into **vernacular** language so that everyone could read it. However, because of these calls for change, significant and permanent divisions occurred within the Christian Church.

Martin Luther was a German Catholic monk and a professor at the University of Wittenberg. Luther believed that some Church teachings were not supported by the Bible. He disagreed with the Church's practices of selling **indulgences** (reduced punishments) and positions of authority in the Church. He was also angry that many priests, who had taken vows of **chastity**, lived openly in sexual relationships.

Martin Luther believed that the Bible was the ultimate source of Christian teaching. He translated the Bible from Latin, Hebrew and ancient Greek into German. The project took him many years and the German New Testament was published in 1522. A complete translation was published in 1534. Many copies of the Bible were sold thanks to the recently invented printing press. This made the Bible accessible to many people who had never read it before.

In 1517, Luther nailed his *Ninety-Five Theses* to the door of Wittenberg Cathedral. His arguments included the following ideas:

- Popes, bishops and priests were not superior to other Christians.
- Christians did not need priests to relate to God.
- Indulgences were a corrupt practice because only God could decide on punishments for sins.
- Priests should be permitted to marry.
- People were not saved (able to enter heaven) by following Church practices.
- People could achieve salvation only through faith in Jesus Christ.

5.10.2 New forms of Protestantism

Other forms of Protestantism soon appeared. In Switzerland, John Calvin formed a church that replaced bishops and priests with elected ministers. Calvinists believed that only some people were chosen to be saved. Calvinism spread into parts of France, Germany, the Netherlands and Scotland.

Among other Protestants were the Anabaptists, who rejected the practice of baptising infants, preferring for individuals to make an informed decision about their faith as an adult. The Church of England was formed initially because the Pope would not grant England's King Henry VIII a divorce. Henry declared that he, not the Pope, was head of the English Church and in 1534 the Church of England became separate to the Roman Catholic Church.

5.10.3 The Counter-Reformation

From the late sixteenth century, the Catholic Church attempted to reform itself by stamping out corruption and promoting Catholic beliefs. This movement was called the Counter-Reformation. The Church began this process at the Council of Trent, 1545 to 1563. Among Catholicism's most effective defenders was the Society of Jesus (Jesuits). It was formed in 1534 to convert heretics and non-believers. Jesuit priests set up missions, schools and colleges in Africa and Asia. In the New World, they befriended and converted many Native Americans.

5.10.4 Wars of religion

Religious uprisings and wars raged across Europe for over a century. In Germany, under the Peace of Augsburg (1555), it was agreed that each ruler had the right to decide the religion of his subjects. However, in 1618, the Thirty Years' War began. It was partly about religion and partly a struggle for power between rival rulers. It spread over much of Europe but was worst in Germany, where a third of the population was wiped out.

SkillBuilder discussion

Using historical sources

1. What do you think the artist is trying to show about the violence of the massacre in his painting?
2. What details in the painting might tell us about the way people saw the massacre at the time it happened?

SOURCE 2 This painting by François Dubois, a Huguenot painter who fled France after the massacre, depicts the Massacre of Saint Bartholomew's Eve in Paris on 24 August 1572.

5.10 SkillBuilder activity HISTORICAL PERSPECTIVES AND INTERPRETATIONS

During the Reformation and Counter-Reformation wars of religion were fought throughout Europe.

1. Use your library and the internet to **investigate** the European wars of religion.
2. Take notes on **where** each conflict was fought, the **motive** for the conflict and the **outcomes**, including death rates and religious repression.
3. **Consider** these conflicts in light of the aims of the Protestant reforms discussed above.
4. **Conduct** a class debate on the following topic:

   The results of the Protestant Reformation were vastly different from the intentions of those who started it.

5.10 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4, 6, 7, 8	9, 10, 11

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statement is True or False. By creating the Church of England, the priests and Henry VIII were declaring that they did not recognise the Pope as the head of the Church and therefore did not recognise his decisions.
2. **Explain** how the Jesuits promoted the beliefs of the Catholic Church.
   - A. The Jesuits set up schools, missions and colleges in Europe and Antarctica, and befriended and converted Native Americans.
   - B. The Jesuits set up orphanages in Africa and Asia, and befriended and converted Native Americans.
   - C. The Jesuits set up schools, missions and colleges in Africa and Asia, and befriended and converted Maoris.
   - D. The Jesuits set up schools, missions and colleges in Africa, and befriended and converted Native Americans.
3. **Define** Protestantism.
4. **Explain** the Counter-Reformation.

5. The _____ refers to the attempts to reform the Catholic Church, which led to the establishment of the _____ churches.
6. **State** who had the right under the Peace of Augsburg to decide what religion people would follow in any state.

ANALYSE AND APPLY

7. From Luther's *Ninety-Five Theses*, **identify** one statement that was concerned with corruption and one statement that challenged Church beliefs.
8. **Clarify** the point Jorg Breu was making about indulgences in **SOURCE 1**.
9. Using **SOURCE 2** as your evidence, write a paragraph and **describe** one consequence of the Reformation.

EVALUATE AND COMMUNICATE

10. **Create** a list ordering the events of the Reformation and Counter-Reformation chronologically.
11. **Summarise** how the results of the Reformation differed from the intentions of those who started it.

Answers and sample responses for this topic are available online.

LESSON 5.11 What were the legacies of the Renaissance?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **recall** important Renaissance literary and artistic works
- **recall** and explain the important changes in scientific method which occurred during the Renaissance
- **identify** and **discuss** the legacies of the Renaissance.

Tune in

SOURCE 1 shows a section of the fresco (a mural applied over wet plaster) painted on the ceiling of the Sistine Chapel in the Vatican. The artwork was completed by Michelangelo between 1508 and 1512 and contains biblical and ancient references.

SOURCE 1 Artwork on the ceiling of the Sistine Chapel at St Peter's Basilica

1. **Examine SOURCE 1 and consider how the artist would have been able to paint such a huge scene on a ceiling in a time before modern machinery.**
2. **Discuss what this painting reveals about the values and attitudes of the society in which it was made.**

5.11.1 Renaissance art and literature

The legacy of the Renaissance is enormous. Its spirit of inquiry encouraged change and a thirst for new knowledge and understanding. It brought ways of thinking that were essential to the scientific advances and are still very much a part of the modern world. The Renaissance era has also given us a wonderful cultural legacy, while the Reformation and Counter-Reformation changed the Christian faith and led to new **denominations**.

Millions of people visit Italy every year to see the artistic legacies of the Renaissance. In Florence, they visit sites such as the Cathedral of Santa Maria del Fiore, the Uffizi Gallery, which has some of the great works of Renaissance art, and the Accademia Gallery, which holds Michelangelo's magnificent sculpture *David*. The Vatican in Rome holds many more Renaissance artistic treasures, and there are others scattered around churches, galleries and museums across Italy and throughout the world.

SkillBuilder discussion

Continuity and change

1. How does the dome of St. Peter's Basilica show continuity with earlier Roman architecture, like the Pantheon, while also introducing new ideas?
2. In what ways did Michelangelo's work on the dome influence later architectural designs, especially in churches and cathedrals?

SOURCE 2 The dome of St Peter's Basilica in Vatican City is one of the most famous architectural masterpieces of the Renaissance. Designed by Michelangelo and completed in 1590.

The spirit of the Renaissance combined with the introduction of printing contributed to the rise of literature, which has been with us ever since.

Famous Italian Renaissance writers included Dante, Petrarch and Boccaccio. Leonardo Bruni is considered the first modern historian. Niccolo Machiavelli (1469–1527) described ruthless methods of gaining political power in *The Prince*. Today we use the word *Machiavellian* to describe someone who uses ruthless, scheming methods to rise in politics.

Even more significant have been the works of the great English Renaissance–era playwright William Shakespeare (1564–1616). Not since the age of the ancient Greeks had such great steps been taken to explore human behaviour through drama. In his own time, the audiences at Shakespeare's plays included every level of English society. Shakespeare's plays are still widely studied. They have been translated into almost all modern languages and their performances still draw huge audiences throughout the world. This is because they portray human situations and conflicts and pose questions that are still relevant to modern times.

5.11.2 Scientific legacies

Perhaps the most important of all legacies of the Renaissance era is scientific thinking. Before the Renaissance, scientific studies were not seen as separate from religion, and authorities saw inquiry as a threat to their beliefs and their power. We know today that there is still much remaining to be discovered.

Renaissance thinkers like Copernicus and Galileo investigated and developed hypotheses based on observations, calculations and other kinds of evidence. We owe a great debt to those who pushed the boundaries of knowledge.

5.11 SkillBuilder activity HISTORICAL PERSPECTIVES AND INTERPRETATIONS, COMMUNICATING

1. The Renaissance was a time of new ideas and change.
   a. **List** the positive and negative consequences of the Renaissance. (**Consider** the changes that caused conflict as well as the changes that were celebrated.)
   b. Review your list with a partner. **Identify** any consequences that you put into different columns. **Discuss** your reasons for doing this.
   c. **Determine** whether you would change your list after your discussion with your partner and explain why or why not.
   d. Having considered your list, **decide** if you think the consequences of the Renaissance were mainly positive or mainly negative. **Justify** your position with reasons.
   e. Review your list and **decide** which single consequence you think is the most important. Provide a reason for your opinion.
2. Draw up three columns in your workbook.
   a. In the first column, **list** the legacies of the Renaissance era.
   b. In the middle column, give one example of each type of legacy. You may need to look back at previous lessons for more information.
   c. In the third column, **rank** these legacies in the order in which you think they have had the most impact on the modern world.
   d. Share your list with the class and **justify** your rankings.

5.11 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4, 6	5, 7, 8	9, 10

REMEMBER AND UNDERSTAND

1. **Explain** how the Reformation changed who could read the Bible. **Select** all that apply.
   A. The Reformation and Counter-Reformation encouraged the spread of education so more people could read the Bible.
   B. The Bible was translated into the native language of each country, so it was no longer confined to people who could read Latin; anyone who could read their native language could now read it.
   C. The invention of the printing press meant that Bibles were more affordable and so more people could own one.
   D. The invention of the photocopier also meant that Bibles were more affordable and so more people could own one.
2. **Determine** whether the following statement is True or False. Today we use the word *Machiavellian* to describe someone who uses ruthless methods in politics.
3. **Identify** the locations where you might see examples of Renaissance art.
4. **List** three legacies of the Renaissance.
5. **Explain** how the discoveries of Copernicus and Galileo changed the way we think about the universe.
6. *Scientific thinking* is a phrase used to describe a way of thinking about the world that is based on _____, evidence and _____.

ANALYSE AND APPLY

7. **Explain** what **SOURCES 1** and **2** can show us about the ideas, values and skills of Renaissance artists and architects. Refer to specific aspects of each source in your answer.

EVALUATE AND COMMUNICATE

8. Many patrons of the Renaissance were motivated by a desire to make their cities more beautiful. **Consider** one city-state you have studied and decide if its patrons had achieved their aims. **Justify** your response with examples. Present your ideas as an annotated visual.
9. The Renaissance saw conflict between scientific discovery and religious ideas. **Explain** whether there is still such a conflict today or a person can be both scientific and religious. **Justify** your response.
10. **Evaluate** which scientific discovery of the Renaissance is most significant. **Justify** your position with a reason.

Answers and sample responses for this topic are available online.

LESSON 5.12 Inquiry: Who were the significant women of the Renaissance?

LEARNING INTENTION

By the end of this lesson you should have an understanding of the role and influence of some significant women who lived during the Renaissance.

Background

Several women played an important role in society during the Renaissance, including **Lucrezia Borgia**, **Catherine de' Medici**, **Isabella d'Este** and **Caterina Sforza**. We can study the contribution of these individuals and learn about the position and role of women during the Renaissance.

Task

Create a 2–3-minute script for a short video or photo story that **evaluates** the significance of one of the significant women of the Renaissance to our understanding of Renaissance society. You will be assessed on your ability to **communicate** a clear contention supported by specific evidence.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the competition of the inquiry task, you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching

Compose three questions about the significance of your chosen significant woman. **Consider** the following prompts:

- **Evaluate** the position and role of women in society.
- **Analyse** differences in historical perspectives.
- **Analyse** the role of men in her family.

You will need specific detailed information to analyse. Think carefully about your search terms and use trusted online resources.

Take notes on your findings and organise them under headings similar to those below.

- Name:
- Birth–death:
- Contributed in the area(s) of:
- Historical significance:
- Faced challenges in:

Step 2: Using historical sources

As you research a significant female figure from the Renaissance, focus on primary sources. Use online resources to find accounts of her life in different stages. Look for both negative and positive depictions from other sources. Renaissance paintings can also serve as primary sources. Consider how the subject is portrayed.

Analyse how each historian's background and values might influence their view of her. Organise your findings in a table, noting the reasons behind each historian's position.

Step 3: Historical perspectives and interpretations

Think carefully about the primary sources and historical interpretations in your notes. Assessments of your chosen Renaissance woman are often diverse, influenced by the people around her, such as family members and social context.

Questions to consider:

- Did the authors of the primary sources have first-hand knowledge of the person you're studying? Can their claims be verified?
- What do the historical interpretations reveal about the attitudes of historians? How have these interpretations changed over time?
- What can historians learn from studying this woman's life about the role and position of women during the Renaissance?

Step 4: Communicating

Reflect on your study, read through your notes and make three strong claims about the significance of her life. Write each claim as a statement, supporting it with evidence (whether from primary sources or historical interpretations). Analyse each claim to explain its importance. Review and revise your claims as needed.

LESSON 5.13 Review

5.13.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

5.2 How do we know about Renaissance Italy?

- During the Renaissance there was renewed interest in the ideas and art of ancient Greece and Rome.
- Study and innovation gave rise to new cultural expression and intellectual pursuits.
- A large range of primary sources survive from the Renaissance.

5.3 What were the origins of the Renaissance?

- City-states became important centres, which encouraged the changes of the Renaissance.
- New industries made a new group of people wealthy.
- Wealthy individuals and groups commissioned art, architecture, literature and music.

5.4 Why is Florence called the cradle of the Renaissance?

- During the Renaissance, Florence grew into a large urban centre, with a variety of profitable industries.
- Lifestyles and experiences varied between social groups.
- Florence was governed by members of the guilds.
- Wealthy merchant families, including the Medici family, were able to manipulate the government system and exercise considerable political power.
- Humanism encouraged the expansion of intellectual pursuits during the Renaissance, including a broader education curriculum and an interest in classical Greek and Roman literature.

5.5 How did Venice contribute to the Renaissance?

- Venice became a strong naval power and centre of trade during the Renaissance.
- Advances in shipbuilding techniques made the Venetian industry very efficient.
- Venice was a republic until 1797, when Napoleon invaded.

5.6 What was it like to live during the Renaissance?

- During the Renaissance, families provided guidance, advice and connections to individuals.
- Social networks were important for conducting business, developing friendships and asking for favours.
- The Church played an important role in people's lives, marking important occasions like marriage and baptism, as well as holding feasts and festivals.
- Marriages tended to be arranged between families, rather than between individuals.

5.7 How did art, architecture and sculpture change during the Renaissance?

- Religious scenes continued to be popular, but new subject matter appeared in art and sculpture.
- Artists introduced new techniques, including linear perspective that showed depth more realistically.
- New techniques and styles were introduced in architecture, including the use of columns and arches.

5.8 Who contributed to the Scientific Revolution?

- During the Renaissance, scientific discovery was increasingly based on observations and logic.
- Many scientific discoveries were made during the Renaissance, including in astronomy, medicine, biology and mathematics.
- Copernicus suggested a new model of the solar system and Galileo made observations of the planets using a telescope.

5.9 How did the Renaissance spread?

- From the mid-fifteenth century, the ideas of the Renaissance spread from Italy to Europe.
- The printing press meant that books were more widely available.

- The movement of artists, scholars and Humanists spread ideas throughout Europe.
- In the early sixteenth century, English culture flourished.

5.10 What were the Reformation and Counter-Reformation?

- The Reformation began as a series of unrelated attempts to reform the Catholic Church.
- One important reformer was Martin Luther, who translated the Bible into German so more people could read it.
- In Switzerland, John Calvin formed a church with elected ministers.
- In England, King Henry VIII created the Church of England and became its head, replacing the Pope.
- In response to the Reformation, the Catholic Church experienced its own period of reform, called the Counter-Reformation.

5.11 What were the legacies of the Renaissance?

- The Renaissance gave the world an enormous cultural legacy of art, sculpture, architecture, poetry and literature.
- The spirit of intellectual inquiry in Humanism influenced new generations to study and create.
- The advances in the fields of science and mathematics contributed to modern society.
- The Reformation created several new Christian denominations that exist today.
- The Bible was translated into local languages and large numbers were printed on printing presses.

5.12 Inquiry: Who were the significant women of the Renaissance?

- Women in the Renaissance exercised notable influence in various fields, including politics, art and literature.
- Views on their lives and character varied considerably during the Renaissance, shaped by societal norms and the roles they were expected to play.

5.13.2 Key terms

anatomical drawing drawing showing the workings of organs and systems of the body
anatomy the scientific study of the structure of the body
arsenalotti craftsmen who built ships in Venice
chastity choosing not to have sexual relationships
denomination a branch of the Christian Church
doctrine a collective teaching
dowry a payment of money or goods as part of a marriage agreement
fresco a picture painted on a freshly plastered wall or ceiling
friar a member of a Catholic order who was supposed to live in poverty
guild an association of craftspeople
hereditary passed from parent to a child
heretic one who rejects the teachings of the Church
indulgences at this time, in this context, indulgence was a way to reduce the amount of punishment one had to undergo for (forgiven) sins
merchant a person who buys and sells goods for profit
oligarchy a government run by a small group of people
patron a person or institution who pays for a work to be created
philosophy the study of the principles underlying all knowledge
popolo grasso a term used to describe the wealthy
popolo minuto a term used to describe people of modest means
republic a state in which the head of the government is not a ruler who inherits his position as might a king or emperor
vernacular everyday language spoken by a particular group or class

5.13.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry questions posed in the Overview:

How did societies change during the Renaissance?

How have individuals, groups and ideas from the Renaissance influenced the modern world?

1. Now that you have completed this topic, what is your view on the questions? Discuss with a partner. Has your learning in this topic changed you view? If so, how?
2. Write a paragraph in response to the inquiry questions, outlining your views.

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Post-test	Online post-test
eWorkbook	Customisable worksheets for this topic (ewbk-14238) Reflection (ewbk-10577)
Digital document	Key terms glossary (doc-43119)
Video eLesson	Renaissance Italy (c. 1400–1600) (eles-xxxx)

5.13 Exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 7, 11, 12	2, 4, 6, 8, 13, 14	5, 9, 10, 15

REMEMBER AND UNDERSTAND

1. The Renaissance began in the city-states of:
   A. England
   B. France
   C. Italy
   D. Spain
2. The culture of the Renaissance was influenced by an interest in:
   A. medieval Church thinkers.
   B. classical Greece and Rome.
   C. Viking relics.
   D. Indian scholars.
3. During the Renaissance, there were changes in:
   A. art, sculpture and architecture.
   B. science and mathematics.
   C. literature.
   D. All of the above
4. Patrons played an important role in the production of art and literature during the Renaissance by:
   A. paying for works to be produced.
   B. directing arts/scholars regarding composition.
   C. collecting works of classical Greece and Rome.
   D. All of the above
5. Florence and Venice were republics, meaning that:
   A. they were ruled by a duke.
   B. they were ruled by a small group of citizens.
   C. they were ruled by the Pope.
   D. everyone in the city-state had a vote.

6. Venice was a wealthy city-state that was a centre of:
   A. wool and silk manufacturing.
   B. agricultural production.
   C. trade and shipbuilding.
   D. timber and mining.
7. During the Renaissance, art, sculpture and architecture included:
   A. anatomically correct figures.
   B. portraits.
   C. perspective.
   D. All of the above
8. Scientific thinkers of the Renaissance based their theories on:
   A. observations and logic.
   B. the teaching of the Catholic Church.
   C. accepted theories.
   D. popular opinion.
9. The ideas of the Renaissance spread throughout Europe as a result of:
   A. trade between city-states and countries.
   B. travel of patrons and artists.
   C. individuals studying at Italian universities.
   D. All of the above
10. The Reformation was:
   A. encouraged by the Catholic Church.
   B. a series of unrelated attempts to reform the Catholic Church.
   C. accepted by everyone.
   D. a movement of the Catholic Church to reform itself.

ANALYSE AND APPLY

11. **Select** the correct terms to complete the following sentences.
   a. During the Renaissance, **eastern** / **western** European scholars were inspired by the classical art and literature of Ancient Greece and Rome.
   b. The first **schools** / **universities** were formed by people who encouraged a new spirit of inquiry.
   c. This spirit of inquiry often led to criticism of the **Catholic** / **Protestant** Church.
   d. Humanism stressed the importance of **faith** / **logic and reason**.
12. **Match** the Renaissance person or group to their achievement.

Name	Achievement
Leonardo da Vinci	a. missions and schools in Asia and Africa
Michelangelo Buonarroti	b. the Reformation in Switzerland
Filippo Brunelleschi	c. architecture
The Medici family	d. the heliocentric system
Galileo Galilei	e. painting and sculpture
Nicolaus Copernicus	f. patronage of artists
John Calvin	g. a powerful telescope
The Jesuits	h. many designs for inventions and engineering, scientific experiments, art and music

13. **Describe** the factors that influenced the emergence of the Renaissance in Italy in the fourteenth century.
14. **Outline** what is meant by the term 'Reformation' and explain the changes that occurred during it.

EVALUATE AND COMMUNICATE

15. **Evaluate** the extent that attitudes to science changed during the Renaissance.

Answers and sample responses for this topic are available online.

6 The Spanish and the Americas

LESSON SEQUENCE

6.1 Overview 122
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6.3 Who were the Aztecs? 126
6.4 How did the arrival of the conquistadors change the Americas? 132
6.5 What were the effects of conquest and colonisation? 136
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6.7 Inquiry: Spanish conquest exhibition 145
6.8 Review 147

LESSON 6.1 Overview

INQUIRY QUESTION

What were the significant changes to the Americas as a result of the Spanish conquest?

In 1492, the most powerful civilisations in the Americas were the Aztecs, Inca and Maya. The Inca people lived in what is now Chile and Peru. The Maya were in eastern Mexico on the Yucatan Peninsula, and the Aztecs lived to the west. The Aztecs and Maya were part of a region called Mesoamerica, known for its temples, architecture and rich history. However, after the Spanish conquest, all three civilisations collapsed, and the Americas changed forever.

learnon

- **Pre-test**
  Online Pre-test
- **eWorkbook**
  Customisable worksheets for this topic
- **Digital documents**
  Key terms glossary
- **Video eLesson**
  The Spanish conquest of the Americas (c. 1492–1572)

1250
Aztecs settle near Lake Texcoco.

1350
Causeways and canals of Tenochtitlan are built.

1400
Aztecs expand their empire by defeating the Tepanecs.

BCE 1250 — 1300 — 1350 — 1400

1325
City of Tenochtitlan is founded by the Aztecs on an island in Lake Texcoco.

SkillBuilder

Use the SkillBuilder activities to develop these Historical concepts and skills:

- HISTORICAL QUESTIONS
- CHRONOLOGY
- USING HISTORICAL SOURCES
- CONTINUITY AND CHANGE
- CAUSES AND CONSEQUENCES
- HISTORICAL SIGNIFICANCE
- COMMUNICATING

1440
Montezuma I begins his rule.

1469
Montezuma I dies and is succeeded by Ahuizotu.

1492
Columbus 'discovers' the Americas.

1502
Montezuma II becomes the ruler of the Aztecs. The Aztec Empire is at its most powerful.

1506
Columbus dies.

1519
Cortes and the Spanish conquistadors arrive at Tenochtitlan.

1520
An outbreak of smallpox, introduced by the Europeans, sweeps through the population of Tenochtitlan, killing up to half the population.

1521
Cortes claims the city of Tenochtitlan for Spain.

1522
Tenochtitlan is rebuilt and named Mexico City. Declared the capital of the Spanish colony in the Americas — 'New Spain'.

1450 1500 1550 CE

LESSON 6.2 How do we know about the Spanish conquest of the Americas?

LEARNING INTENTION

By the end of this lesson, you should **explain** how different sources reveal the Spanish conquest and how perspectives have changed over time.

Tune in

In 1493, Pope Alexander VI's words allowed Spanish explorers to claim and exploit land in the Americas.

SOURCE 1 These words come from Pope Alexander VI's decree of 1493.

> We assign to you and your heirs and successors ... all islands and mainlands found and to be found, discovered and to be discovered ... distant 100 leagues towards the west and south from any of the islands commonly known as the Azores and Cape Verde.

1. **How would the Pope's words impact indigenous peoples? Were they consulted, and what does this indicate about European views?**
2. **Predict what outcomes might arise from the contact between Spanish explorers and indigenous populations?**

6.2.1 European sources

During and after the Spanish conquest of the Americas, **conquistadors** wrote detailed accounts of their experiences. Hernán Cortés, who led the Spanish against the Aztecs, wrote many letters to King Charles V. These letters often glorified his victories and downplayed his failures.

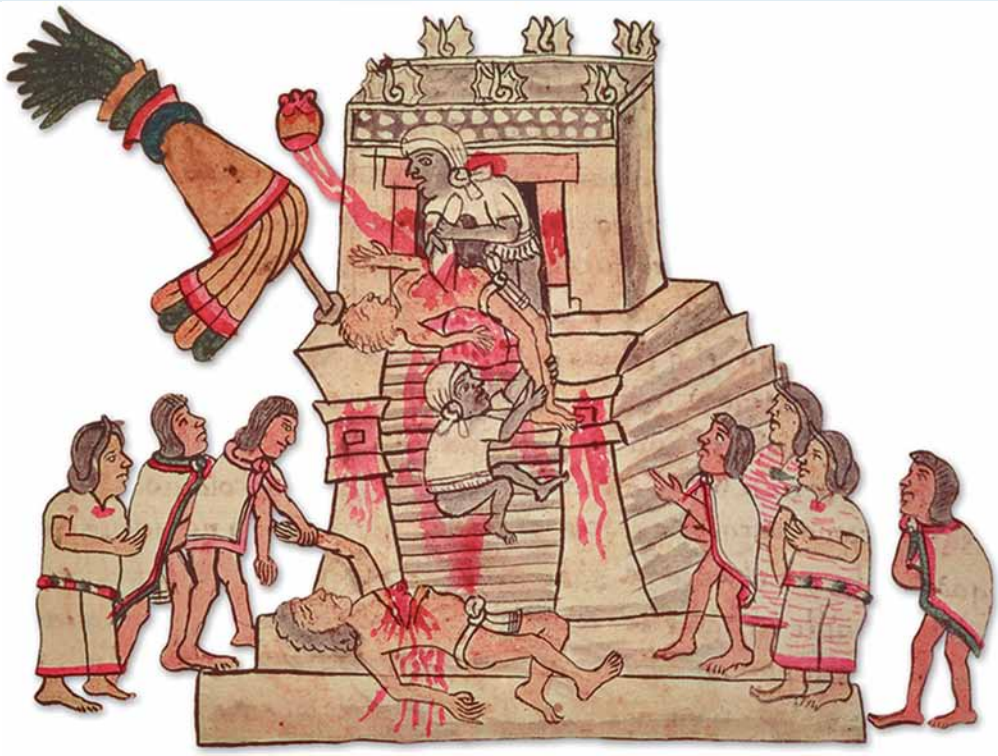
Another important source is **missionary** Bernardino de Sahagún. He created the Florentine **Codex**, a collection of texts about Aztec culture, written in the Aztec language, Nahuatl. Sahagún learned Nahuatl to communicate with Aztec wise men. His work provides a fascinating history of the Aztec civilisation before the Spanish arrived.

The Brevísima relación de la destrucción de las Indias (1552) is a short but powerful account by Bartolomé de las Casas, condemning the cruelty and violence inflicted by Spanish colonisers on indigenous peoples in the Americas. Las Casas describes the massacres, enslavement, and exploitation of native communities. His work is one of the earliest calls for indigenous rights and ethical colonial practices. He wrote to King Charles V, defending their rights. However, all these sources are **subjective** because they were written by Europeans and reflect their views.

6.2.2 Aztec sources

Very few written Aztec sources survived from before the conquest because many were destroyed by the Spanish, either on purpose or during the fighting for Tenochtitlan. Most sources created after the conquest can help historians, but they were made under Spanish supervision. In the following years, some descendants of those who lived through the conquest began to write about events from an Aztec point of view.

SOURCE 2 A scene from an Aztec codex (an early type of book) showing ritual human sacrifice. Such practices were part of Aztec religion.



SkillBuilder discussion

Using historical sources

1. What does **SOURCE 2** tell us about the values and religious beliefs of the Aztec people?
2. What factors should we consider when deciding how reliable or useful this source is for understanding Aztec society?

6.2.3 How reliable are the sources?

All historical sources reflect the values and beliefs of the people who created them, so they are subjective to some extent. For example, the Aztecs believed that their gods needed blood and human hearts to remain strong, making human sacrifice an important part of their religion. In contrast, the Spanish viewed human sacrifice as barbaric, using it as evidence that the Aztecs were uncivilised and inferior to Europeans.

6.2 SkillBuilder activity **USING HISTORICAL SOURCES**

Examine SOURCE 2 and think about what primary sources can tell us about the past. Answer the 'W' prompts below to see how the codex image in **SOURCE 2** can help us understand aspects of life the past.

Who created this?
What was the purpose of the codex?
What does your knowledge of the content tell you about the past? What does it suggest about the practices of the Aztec religion? How might their perspective on human sacrifice differ from that of the Spanish?

Keeping questions like these in mind will help you unpack key points about the past and deepen your understanding.

6.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 7	4, 6	3, 5, 8

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statements are True or False.
   a. All Spanish accounts of the conquest of the Americas glorified themselves.
   b. The Spanish priest Bartolomé de las Casas wrote to King Charles V of Spain defending the rights of the indigenous peoples during the Spanish conquest of the Americas.
   c. The Spanish and Aztec attitudes towards human sacrifice were similar, as they both believed that their gods grew stronger through sacrifices.
2. **Identify** which of the following explains why few Aztec sources from before the conquest survived.
   A. Aztec records were passed on verbally and not recorded.
   B. They were destroyed by the Spanish.
   C. They may have been destroyed during the fighting for Tenochtitlan.
   D. They were lost at sea during transportation to Europe.
3. **Explain** how a historical source is 'subjective'.
4. **State** the ways in which recording of events in the Aztec world changed after the Spanish arrived.
5. **Explain** why the perspectives of the Spanish missionaries might differ from those of the conquistadors.

ANALYSE AND APPLY

6. a. **Explain** why there are differences between Cortés's and de Sahagún's accounts of the actions of the Spanish conquistadors.
   b. **Identify** how both Cortés's and de Sahagún's accounts could be useful to historians, despite their differences.
7. **Explain** why historical sources might be destroyed intentionally.
8. **Identify** strategies that could be used to minimise the effect of subjectivity when studying particular sources.

Answers and sample responses for this topic are available online.

LESSON 6.3 Who were the Aztecs?

LEARNING INTENTION

By the end of this lesson, you should be able to **describe** the main features and the social organisation of the Aztecs and life in the capital city, Tenochtitlan.

6.3.1 Everyday life in Tenochtitlan

The Aztec people arrived in what is now Mexico in the late 1100s. By 1250, they settled near Lake Texcoco and started building the grand city of Tenochtitlan in 1325.

Tenochtitlan was one of the best-planned cities in the world at that time. It was built on five swampy islands in the middle of Lake Texcoco, with three long causeways connecting it to the land. The city had canals and roads, allowing people to move around by foot or canoe.

Tune in

For over three hundred years before the Spanish arrived, the Aztecs dominated central and southern Mexico. Their civilisation was complex and well-organised, featuring impressive buildings and advanced farming techniques.

SOURCE 1 A modern artist's impression of the city of Tenochtitlan

A The Aztec step pyramids were tall and impressive in Tenochtitlan. When they needed a larger pyramid for their gods, they built on top of the old one.

B Tenochtitlan's streets had no vehicles. While they knew about wheels, they mainly used them for toys. There were no pack animals to pull carts or wagons, so wheels were not necessary.

C Canals in Tenochtitlan acted like highways, and boats were the main way to get around.

D *Chinampas*, or floating islands, were used to grow crops.

1. **What impression do you get from SOURCE 1 about the Aztec civilization?**
2. **What type of transport appears to have been important to the Aztec people?**
3. **Use three words to describe your thoughts about the city of Tenochtitlan. Discuss your ideas and give reasons for your thoughts.**

School

The Aztecs were a well-organised society. Young boys went to school to learn important skills, while girls were usually taught at home. At 15, boys could attend two types of school: noble boys went to the *calmecac* for advanced learning, while commoners attended the *telpochcalli*, a military school. All boys learned some fighting skills.

Food

The Aztecs ate two main meals a day, usually one during the hottest part of the day. Their diet was based on maize, but they also enjoyed various meats and vegetables. Aztec culture is famous for chocolate, which was only for warriors and nobles and mixed with maize to make a drink. Alcohol, called *octli*, came from the maguey plant and was also reserved for nobles and warriors, with commoners allowed to drink it only on special occasions.

Crime and punishment

The Aztecs had very harsh punishments for crimes. For example, a commoner wearing cotton clothes could be sentenced to death. The same punishment could happen for adultery or cutting down a living tree. A group of judges decided the sentences, similar to today's justice system in Australia. Although these punishments seem extreme now, they would not have seemed particularly unusual to European observers at the time because punishments in Europe were also harsh by modern standards.

6.3.2 Aztec warfare

Life in the Aztec Empire was not peaceful. The Aztecs were often at war with the Tlaxcala people, who lived nearby. The Aztec army had two main groups: commoners trained in basic fighting and professional warriors. Among the bravest were the eagle and jaguar warriors, known for their fierce uniforms.

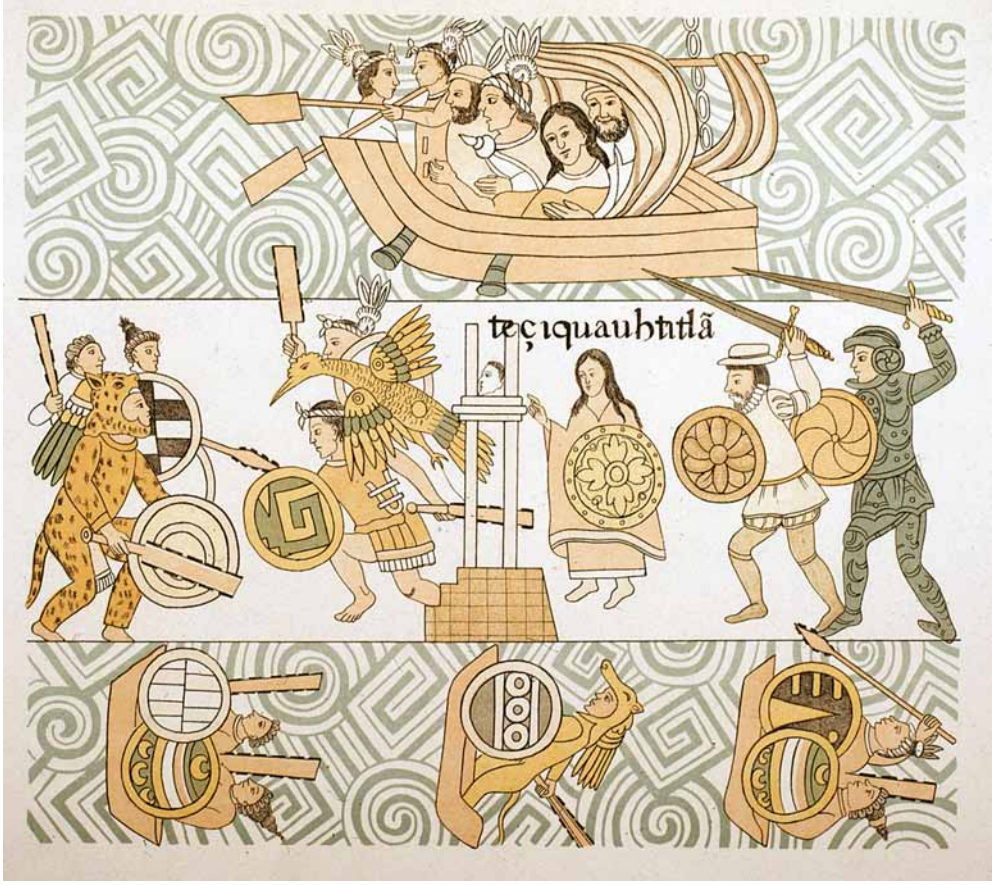
In battles, there were usually fewer casualties than in European wars because the Aztecs valued prisoners. They preferred to capture enemies for slavery or human sacrifice rather than kill them.

SkillBuilder discussion

Using historical sources

1. What skills made jaguar warriors special in the Aztec army?
2. How did jaguar warriors show their bravery in battle?
3. What other roles did jaguar warriors have in Aztec society?

SOURCE 2 An illustration from an Aztec codex showing jaguar warriors of the Aztec army. On the right, Spanish conquistadors are visible.



6.3.3 Mythology and religion

Religion was very important to the Aztecs, who worshipped many gods — hundreds in total. They believed the Earth was flat and that the Sun fought darkness each night. The Aztecs expressed their devotion through art and by building huge temples for their gods, who controlled nature and human life.

Central to their beliefs was human sacrifice, with up to 20 000 people sacrificed yearly at a special temple. They thought dying this way helped victims reach heaven quickly. The Aztecs also believed in an afterlife: people who died peacefully had to pass through the underworld, unlike warriors or mothers who went straight to heaven.

SOURCE 3 Some of the most important Aztec gods

A. Mictlantecuhtli — god of the dead
B. Quetzalcoatl — god of knowledge, creation, priesthood and wind
C. Tlaloc — god of rain
D. Huitzilopochtli — god of war, sun and the nation
E. Xipe Totec — god of spring, new life and suffering

SOURCE 4 A gold pendant representing Mictlantecuhtli

6.3.4 Agriculture

Tenochtitlan was built in the middle of a lake, so the Aztecs had to find special ways to grow crops. They used *chinampas*, often called 'floating gardens'. *Chinampas* were small, man-made islands created for farming. The Aztecs would fence off a shallow area of the lake and fill it with mud, sediment and decaying plants until it rose above the water. This made a very fertile spot to grow different crops. This method is still used today in some parts of Mexico.

SkillBuilder discussion

Continuity and change

1. Look at **SOURCE 5**. What are the initial steps in creating a *chinampa* for farming?
2. How do farmers maintain water levels and soil fertility in *chinampas*?
3. How do the Aztecs benefit from this farming method?

SOURCE 5 The cross-section of different stages of development of *chinampas*

SOURCE 6 A modern-day *chinampa* in use in Mexico

6.3 SkillBuilder activity CONTINUITY AND CHANGE

In pairs, complete research to **investigate** one of the following topics:

- Modern-day use of *chinampas* in Mexico: Why are they used today? How have they changed over the centuries? How important are they for farming in Mexico now?
- Religion in current-day Mexico: What festivals are celebrated? Are they similar to those during the Aztec Empire? What similarities and differences can you identify?

Use a table like the one below to **summarise** the similarities and differences you find. The table focuses on religion, but you can adapt it if you choose to research *chinampa* use.

You might want to use the **Mexico Lore** weblink in the Resources panel which contains lots of information that can help with your research.

What types of change have occurred in Aztec religion?	What continuities are there between Aztec and modern-day religion in Mexico?	Explain the importance of religion in Aztec and modern Mexico, and if you think that importance has changed over time.
* * *	* * *	*Use this space to express your ideas in a paragraph.*

As a class, **discuss** how much the Aztec culture influences modern-day Mexico.

6.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5	6, 7, 8

REMEMBER AND UNDERSTAND

1. Using **SOURCE 1** and your understanding from reading the text, **identify** which of the following statements does *not* accurately describe the city of Tenochtitlan.
   A. Tenochtitlan was a city built on five swampy islands in the middle of Lake Texcoco.
   B. Tenochtitlan was connected to the lake's edges by three causeways and all parts of the city could be accessed by either roads or canals.
   C. People travelled on foot or by bike and goods were transported by horse-drawn carriages.
   D. Pyramid-style buildings dominated the skyline and *chinampas* were used to grow crops to feed the city.
2. Some key differences between the diet of the nobility and that of the commoners were that the nobility had a drink made from chocolate and an alcoholic drink called *octli* made from the sap of the maguey plant. True or False?
3. Why might the Aztecs' common use of the death penalty not have shocked the Spanish?
   A. The Spanish didn't believe that it occurred.
   B. The penalty was hidden from the Spanish.
   C. Spanish law was also harsh.
   D. The penalty was never actually carried out.
4. **Recall** three key aspects of Aztec religion.

ANALYSE AND APPLY

5. **Analyse SOURCE 3**. **Identify** features of the illustrations that could help you identify the different gods if there were no labels.
6. **Explain** how **SOURCE 4** supports the argument that religion was important to the Aztecs.
7. **Explain** why the battles between the Tlaxcalans and the Aztecs left fewer casualties than European battles.
8. **Compare** and **contrast SOURCES 4** and **5** with reference to the image they portray of Aztec culture.
   a. If you referred to only one image, how accurate and reliable do you think your impression of the Aztecs would be?
   b. Using your responses to part a, **explain** why it is important for students of history to refer to a number of different sources.

Answers and sample responses for this topic are available online.

LESSON 6.4 How did the arrival of the conquistadors change the Americas?

LEARNING INTENTION

By the end of this lesson, you should be able to **explain** the arrival of Spanish conquistadors.

Tune in

In the 15th and 16th centuries, Europeans explored new lands. They were looking for wealth and resources. This made many European countries rich but hurt the native peoples of the Americas.

1. **Look at the painting. Notice how the different people — the Spanish and the Native Americans — are shown. Does their portrayal suggest a particular perspective on the part of the artist?**
2. **Consider how accurate you think this image is compared to how the event occurred.**

SOURCE 1 An artwork created in 1862 showing Columbus taking possession of the New World for Spain

6.4.1 European expansion

In the 15th and 16th centuries, European countries quickly expanded their colonies, especially in the Americas. Europeans often clashed violently with the native people. In most cases, the two cultures could not **coexist** peacefully — one would dominate the other, like Hernán Cortés and the Aztecs.

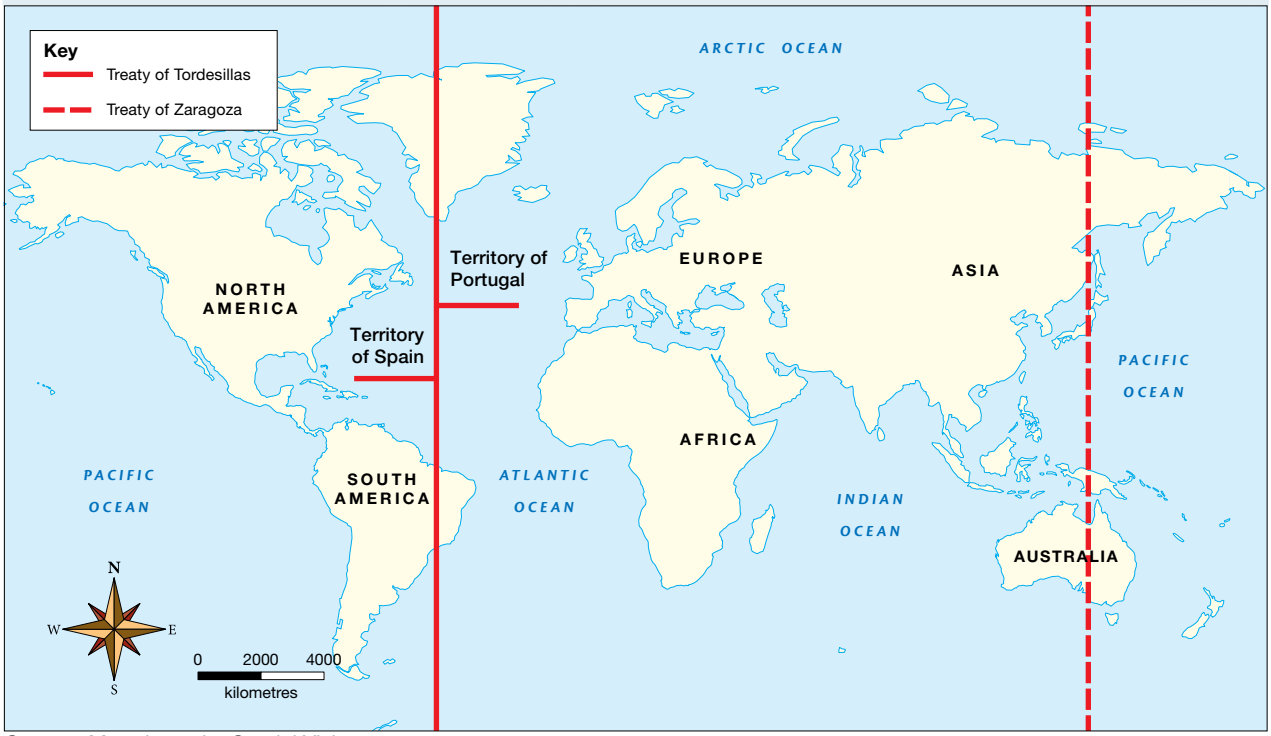
6.4.2 Columbus sets the scene

With support from Spain, Christopher Columbus, an Italian explorer, set out in August 1492 to find a route to Asia at a time when no one in Europe knew the Americas existed. When he reached land in October, he thought he had arrived in Asia, but he was actually in the Bahamas. Between 1493 and 1504, Columbus made three more trips to the '**New World**'. He started Spain's first American colony on Hispaniola and was the first of many explorers to bring ideas of conquest and control.

6.4.3 The 'legal' conquest

At the time of Columbus' voyage, Spain and Portugal were major rivals in exploring the oceans. Their relationship was tense, and Columbus' discovery could lead to conflict. To prevent this, Pope Alexander VI issued a decree in 1493, giving Spain the right to colonise the Americas. Any land not inhabited by Christians could be 'discovered'. This allowed, as far as the Spanish were concerned, the 'legal' displacement or enslavement of native people. The next year, a treaty was signed to clarify where Spain and Portugal could explore and trade. This was called the Treaty of Tordesillas, and it divided the new lands between the two countries.

SOURCE 2 A map indicating the division of the world under the Treaty of Tordesillas



Source: Map drawn by Spatial Vision.

SkillBuilder discussion

Causes and consequences

1. Based on what you have read so far, explain why Spain and Portugal were rivals during Columbus' voyage?
2. What did Pope Alexander VI's 1493 decree grant Spain?
3. How did the Treaty of Tordesillas aim to prevent conflict? Predict whether it had succeeded in preventing conflict.

6.4.4 Balboa: First to cross

Spanish explorer Vasco Núñez de Balboa is remembered as the first European to cross the Americas. Inspired by Columbus' discoveries, he travelled to the New World in 1500 and helped set up settlements in the Caribbean. In September 1513, he crossed the isthmus of Panama and became the first European to see the Pacific Ocean.

6.4.5 Cortés: Man of ambition

Hernán Cortés was born in 1485 to a Spanish nobleman. After studying at university, he moved to the Caribbean island of Hispaniola at 19. Six years later, he joined the conquest of Cuba under Diego Velázquez. Cortés believed the Aztecs in Mexico had much to offer, especially gold.

In February 1519, he sailed to Mexico and, after arriving, destroyed his ships to ensure his men did not have any thoughts about deserting. Marching towards the Aztec capital, Tenochtitlan, he encountered the Tlaxcalans, a kingdom resisting the Aztecs. Early encounters between the two civilisations were violent and movement was difficult for the Spanish because their horses and cannons struggled on rough terrain. However, as they fought their way to level ground, the Spanish gained the upper hand.

After the early violent encounters, the Tlaxcalans permitted the Spanish to enter their territory — no doubt they were terrified by the Spanish firearms and horses, neither of which they had ever seen before. For their part, the Spanish granted them a truce in return for their support against the Aztecs. Cortés avoided main routes to prevent ambushes and sought allies who would join him in his campaign against the Aztecs. For three months, they navigated diverse terrains and struggled with the hot climate, discovering strange plants and animals unlike anything in Europe.

SOURCE 3 A map of the Aztec capital, Tenochtitlan, attributed to Hernán Cortés

SOURCE 4 A colour lithograph, created in 1892, showing Montezuma greeting Cortés in Tenochtitlan

In November 1519, the Spaniards arrived at Tenochtitlan and found a bustling city on Lake Texcoco with around 250 000 residents. The city's wealth came from gold, jewels and crops. Montezuma II, the Aztec emperor, welcomed Cortés, although the belief that Montezuma mistook him for the god Quetzalcoatl is unconfirmed by Cortés' letters.

Cortés took Montezuma hostage to strengthen his position, leading to an uprising that drove the Spanish out and resulted in Montezuma's death, likely by his own people. In 1521, Cortés returned, besieged Tenochtitlan for two months, and claimed the city for Spain on 13 August, resulting in its destruction and thousands of Aztec deaths.

SkillBuilder discussion

Using historical sources

1. What words or phrases help you understand how the Aztecs felt during the fall of Tenochtitlan?
2. How does this poem help us understand the impact of the Spanish conquest on the Aztec people?
3. What might be missing from this perspective?

SOURCE 5 'Lament on the Fall of Tenochtitlan', a poem by an anonymous Aztec poet

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

Weep my people

Know that with these disasters

We have lost the Mexican nation

The water has turned bitter

Our food is bitter

These are the acts of the Giver of Life

Did you know?

Iron played a big role in the Spanish conquest of the Aztecs. The indigenous peoples of the New World didn't use iron and relied on older weapons. Iron was important because it was used to make swords, daggers, lances and knives.

It was also key for crossbows, cannons and firearms, and helped make armour, helmets and shields more effective. This gave the Spanish a major advantage that helped them defeat the Aztecs.

It took the Spaniards about two years to destroy the Aztec civilisation. Many Aztecs were killed by the conquistadors, but thousands more died from famine and diseases brought by the Europeans.

Those who survived lost their dignity, wealth and temples. The Spaniards believed it was their duty to convert the Aztecs to Christianity, which caused the Aztecs to lose much of their culture.

6.4.6 Pizarro

Cortés' victory over the Aztecs initiated European expansion in the Americas. Over two centuries, the Spanish controlled several Native American societies, including the Inca and the Maya. The Inca, living in present-day Peru and Chile, faced Spanish conquistador Francisco Pizarro in 1526. Conquering the Inca was challenging due to mountainous terrain and climate, but Spanish weapons and disease eventually weakened their resistance. Lima was founded in 1535, and the Viceroyalty of Peru was established in 1542.

The Maya lived on the Yucatán Peninsula and presented unique challenges. As the Maya lacked a central capital, the Spanish had to conquer each independent city-state individually, taking over 150 years to subdue the last Mayan city.

6.4 SkillBuilder activity HISTORICAL SIGNIFICANCE

Select one of the following individuals and **consider** the significance of his role in the colonisation of the Americas: Columbus; Balboa; Cortés; Pizarro.

Consider the following questions to guide your thinking and make some notes:

- To what extent were people's lives changed due to the actions or decisions of the individual?
- How long-lasting were the consequences of their impact?
- How can the consequences still be felt today?

When you have recorded some thoughts for the questions above, **compare** them with a classmate who selected a different individual. As a pair, or in small groups, try to rank the different individuals. Can you make a claim about which are more significant? How have you reached your conclusions?

6.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 10	6, 7, 8, 9

REMEMBER AND UNDERSTAND

1. What were the two main reasons for Spanish settlements in the New World?
   A. Silver
   B. Gold
   C. To convert the Aztecs to Christianity
   D. To convert the Aztecs to Buddhism

2. Why did Cortés follow an indirect route from the coast to Tenochtitlan?
   A. To fill in the time he needed to gather his army
   B. To take in the scenery of the journey
   C. To capture enemy soldiers in towns on the way
   D. To minimise the possibility of ambush
3. **Identify** the correct options to complete the sentence.
   In addition to violence, **hunger** / **disease** / **fear** killed many thousands of **Europeans** / **Aztecs** because they had little resistance to the **crops** / **animals** / **germs** introduced by the **Europeans** / **Aztecs**.
4. Study **SOURCE 3**. What might have been the advantages and disadvantages of the layout of Tenochtitlan if the city was under attack?
5. **Examine SOURCE 4**. **Describe** your impression of the initial meeting between Cortés and Montezuma. **Justify** your viewpoint with evidence.

ANALYSE AND APPLY

6. Study **SOURCE 5**. You will see one of the conquistadors, possibly Cortés himself, embracing two Aztec warriors. **Propose** who these people could be and why they are not fighting against Cortés.
7. Read **SOURCE 5**. *Lament* means 'passionate expression of grief or sorrow'. **Justify** whether you think it is an appropriate term to use for this poem.

EVALUATE AND COMMUNICATE

8. **Explain** what you think was the most significant advantage the Spanish had over the Aztecs during the conquest. For example, was it technology, or perhaps resistance to disease? **Explain** your reasoning.
9. **Evaluate** the significance of geographic features in the Spanish conquest of the Aztec, Inca and Maya civilisations.
10. What does the Treaty of Tordesillas suggest about the power of Spain and Portugal in the fifteenth century?

Answers and sample responses for this topic are available online.

LESSON 6.5 What were the effects of conquest and colonisation?

LEARNING INTENTION

By the end of this lesson, you should be able to **explain** the structure and management of New Spain and its impact on the indigenous people of the Americas and on international relations.

Tune in

Progress? Exploitation? Opportunity? Oppression? That all depends on your perspective.

SOURCE 1 portrays the construction of Mexico City over the ruins of Tenochtitlan using indigenous slaves.

1. **Where can you identify 'progress', 'exploitation', 'opportunity' and 'oppression' in this image?**
2. **How does perspective play a role in identifying each term?**

SOURCE 1 Slaves building Mexico City

6.5.1 A new empire

After defeating the Aztec Empire, Hernán Cortés founded the colony of New Spain, with Mexico City (formerly Tenochtitlan) as its capital. Over time, this colony grew to include what today makes up parts of:

- the United States
- Mexico
- the Caribbean islands
- the Philippines.

Spanish control of these areas lasted more than 400 years. The lands taken after the conquest were very rich and complex, giving Spain a chance to become a world power.

SOURCE 2 A map showing the growth of New Spain in the Americas

Source: Map drawn by Spatial Vision.

SkillBuilder discussion

Communicating

1. Study **SOURCE 2.** What regions are included in the area marked as New Spain?
2. Calculate the approximate size of New Spain as illustrated in this map (i.e. excluding the Philippines). Use the scale to help.
3. How many cities are labelled on the map, and what are their names?

The trade routes that were established between the Americas and Europe became known as the 'Columbian Exchange'. Plants, animals (and diseases!) and technology crossed the oceans. For example, tomatoes, now popular in Italian dishes, were unknown in Europe before being brought from the New World. Other new plants included:

- potatoes
- corn
- tobacco
- bananas
- coffee beans.

New Spain was governed by the '*encomienda* system', established in 1521 to manage the indigenous people. Spanish conquistadors received land and workers, who paid tributes in exchange for protection and conversion to Christianity. They aimed to 'civilise' the natives, but it often turned into little more than forced labour and land theft, leading to the displacement of the people. The Spanish also spread diseases against which the indigenous people had no immunity, resulting in high death rates.

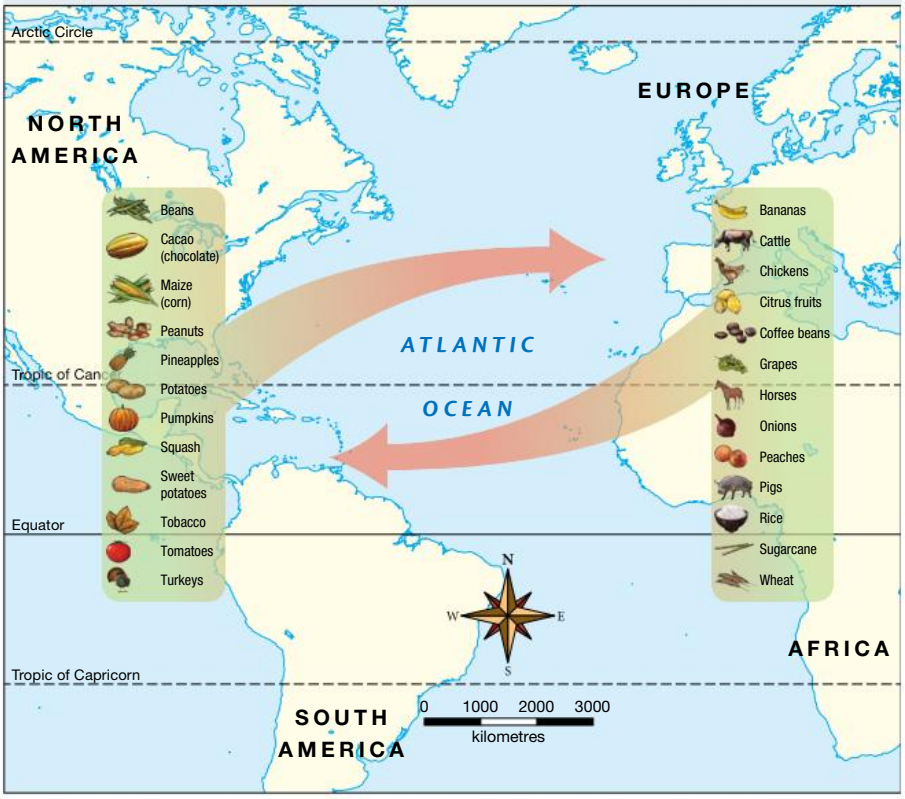
At the same time, the Spanish tried to establish trade routes with the East Indies (modern-day South-East Asia). Travelling west across the Pacific Ocean offered a faster route than the previous long journey around Africa. A Spanish settlement in the Philippines was set up in 1565, creating a busy trade route. Goods like silk, spices, silver and slaves were transported from Asia to the Americas and then to Europe.

SkillBuilder discussion

Communicating

1. Look carefully at **SOURCE 3.** What types of crops are shown as being exchanged from the Americas to Europe?
2. Which animals are listed as being transported from Europe to the Americas?
3. What body of water is between North America and Europe?

SOURCE 3 The Columbian Exchange brought items like tomatoes to Italy and coffee to Brazil.



Source: Map drawn by Spatial Vision.

6.5.2 Expansion and conflict

The Treaty of Tordesillas in 1494 gave Spain and Portugal some peace for a while. However, by the late 1500s, other European countries began to set up their own colonies in the Americas.

When the inevitable conflicts between European nations began, Spain, Great Britain and France were the most active in expanding and fighting for the New World. The Dutch also played a role, mainly in the north-east of North America, famously founding New Amsterdam, which later became New York. All these countries saw the Americas as a chance to gain wealth, and since they often fought each other in Europe, no country wanted the others to succeed.

6.5.3 The end of New Spain

For three centuries, Spain was the dominant power in much of North America. By the early 1800s, calls for independence emerged as colonies sought self-governance. In 1810, Mexico declared independence, leading to a ten-year war that finally achieved freedom.

Britain supported the colonies to weaken Spain's trade control. By the 1820s, most Spanish colonies in the Americas were independent. In 1898, the US defeated Spain, gaining Cuba, Puerto Rico and the Philippines, and ending over 400 years of Spanish rule.

6.5 SkillBuilder activity USING HISTORICAL SOURCES

Your task is to research the expansion of New Spain as shown in **SOURCE 2**.

1. Using an atlas and information found online, **identify** the year of establishment of the cities labelled in **SOURCE 2**.
2. Add the location of some other cities named after saints. Include their name and year of establishment.
3. After plotting your information, **describe** the expansion of New Spain.
   You could refer to one or more of the following:
   - The direction of the expansion
   - The time taken to establish new cities
   - The regions into which New Spain expanded

6.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 6	5, 7, 8

REMEMBER AND UNDERSTAND

1. Why did Spain want to create an empire in the New World? **Identify** all applicable answers.
   A. To convert people from Christianity
   B. To expand its territories
   C. To expand its wealth
   D. To convert people to Catholicism
2. **Identify** which of the following European powers did not have a presence in North America.
   A. Great Britain
   B. France
   C. The Netherlands
   D. Germany

3. Britain, France and the Dutch may have opposed the Treaty of Tordesillas because they had agreed not to explore the New World. True or False?
4. **Identify** the key threats to Spanish control over the North American continent.

ANALYSE AND APPLY

5. **Explain** one way that the idea of the *encomienda* system often differed from the reality.
6. **Describe** one long-term change you think would occur due to the Columbian Exchange.

EVALUATE AND COMMUNICATE

7. **Discuss** how the *encomienda* system benefited the Spanish settlers to the disadvantage of the indigenous population.
8. **Evaluate** the challenges that would have emerged from the exchange of foods and resources you can see in **SOURCE 3**.

Answers and sample responses for this topic are available online.

LESSON 6.6 What were the long-term legacies of conquest and colonisation?

LEARNING INTENTION

By the end of this lesson, you should **understand** the longer-term consequences of conquest and colonisation including those that still affect the world today.

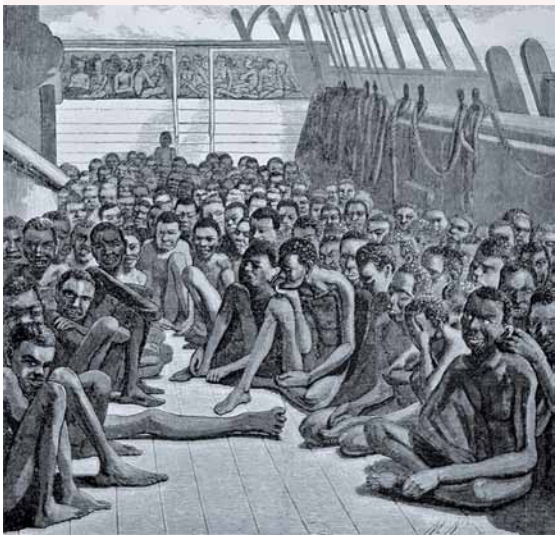
Tune in

Read the following quote by Reverend Robert Walsh, who served aboard a ship that intercepted the illegal slave trade:

"The slaves were all inclosed between decks. The space was so low that they sat between each other's legs . . . they were all branded like sheep with the owner's marks. The head was so great and the odour so offensive that it was quite impossible to enter. I was informed by my friends who had visited so many ships that this was one of the best they had seen."

1. **What aspects from the quote above can you see in the image?**
2. **How would you describe the conditions based on what you can see in the image?**
3. **The image is from 1860. What does this tell you about the long-term consequences of European colonisation of the Americas?**

SOURCE 1 A drawing from the magazine *Harpers Weekly* in 1860 showing slaves on board a ship



6.6.1 Impact on the Aztecs

The Spanish conquest of the Americas had many long-lasting effects. Initially, these effects were mostly felt in the Americas, but as the Columbian Exchange developed, they spread and helped shape the modern world.

Diseases brought by Europeans, along with slavery and hunger, were among the most significant impacts for the Aztec people. By the early 1600s, it is estimated that Mexico's native population had decreased by 90 per cent.

SOURCE 2 discusses more reasons for the population decline in Mexico.

SOURCE 2 From *The Population of the California Indians*, 1769–1970, written by Sherburne Cook

The first [factor] was the food supply ... the second factor was disease ... A third factor, which strongly intensified the effect of the other two, was the social and physical disruption visited upon the Indian. He was driven from his home by the thousands, starved, beaten, raped, and murdered ... The utter devastation caused by the white man was literally incredible, and not until the population figures are examined does the extent of the havoc become evident.

The Spanish conquest led to a significant loss of culture among native peoples, risking the disappearance of traditional art, music and languages. The Aztec codex changed from pictorial to include Spanish and Latin text.

As New Spain expanded, native workers under the *encomienda* system began mixing, blurring their unique cultures. The Spanish also aimed to convert natives to Christianity, leading to blended religious practices that still exist today, with a strong Roman Catholic presence in the Americas.

6.6.2 Slavery

The Spanish introduced a new form of slavery to the New World, differing from Aztec slavery. While Aztec slaves could own property and buy their freedom, their status was not **hereditary**; a child of a slave was not automatically a slave.

The *encomienda* system aimed to convert and protect indigenous workers. However, those who resisted Christianity could be forced into labour, allowing conquistadors to label them as slaves.

Did you know?

An Aztec slave could gain freedom by escaping from the watch of their master while at the *tianquiztli* (marketplace). If they reached the palace without being caught, they became free. Only the master or one of their master's relatives could chase the slave. If anyone else tried to help, they risked being sold into slavery themselves. Look back at **SOURCE 1** in lesson 6.3 and see if you can find the slave trying to escape from his master.

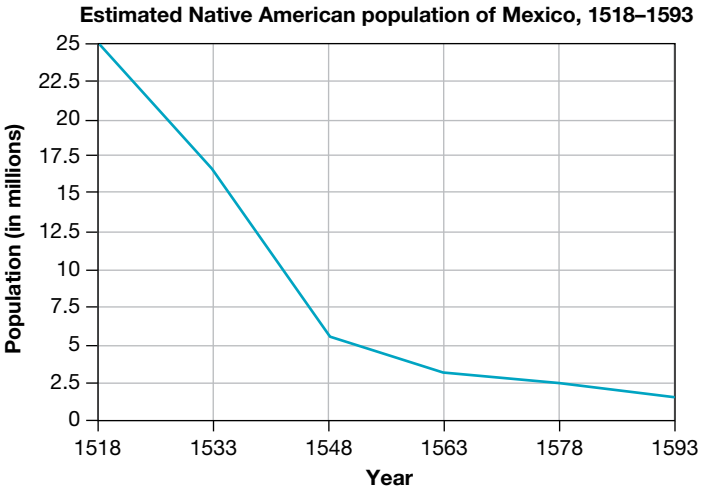
During, and after, the conquest of the Aztec Empire, many native people died from diseases that were introduced by the Europeans. The native population did not have immunity to those diseases and many hundreds of thousands died. To replace lost workers, the Spanish began importing African slaves, who had developed immunity to otherwise deadly diseases due to already having many years of contact with Europeans. Over nearly 400 years, about 12 million Africans were transported to the New World.

SkillBuilder discussion

Historical significance

1. **Describe** what the graph in **SOURCE 3** is showing.
2. Based on your learning and what you may already know, **discuss** the factors that led to the decline of the Aztec population in the sixteenth century.
3. **Explain** the significance of importing African slaves to the New World following the decline in the Aztec population, based on the trends depicted in the graph.

SOURCE 3 A graph showing the decline of the Aztec population in the sixteenth century



SOURCE 4 Aztec artefacts in the National Museum of Anthropology in Mexico City.

6.6.3 Language and religion

Today, around 550 million people speak Spanish, but fewer than ten per cent of those people actually live in Spain. The Spanish Empire helped the spread of the language, making it one of the most spoken languages worldwide. It is the official language in Mexico and most of Central and South America, and is widely spoken in the United States. Most of the world's Spanish speakers live in the Americas, except for Brazil where, due to the Treaty of Tordesillas, Portuguese is spoken due to Portuguese colonisation.

SkillBuilder discussion

Historical questions

1. Describe the main features of the flag in **SOURCE 5**. What does the emblem refer to?
2. In what ways did the Aztec Empire influence the Mexican national flag after Mexico declared independence from Spain in 1810?

SOURCE 5 When Mexico declared independence from Spain in 1810, the new national flag was inspired by the Aztec Empire.

The Spanish also introduced Roman Catholicism to the Americas. The Aztec, Mayan, and Incan people were often forced to convert, or they faced slavery or death. Today, the Roman Catholic Church is very influential in the Americas.

Did you know?

The Spanish introduced new animals to the Americas that completely transformed the native populations' lives. Horses, for example, were unknown in the Americas before the Spanish arrived, but quickly became essential to the cultures of many native groups, especially in the Great Plains of North America, where they revolutionised hunting and warfare.

6.6.4 Impact beyond the Americas

The colonisation of New Spain meant that the Spanish Empire became one of the world's most powerful empires. The natural resources in that region included:

- gold
- silver
- furs
- sugar
- cotton.

Access to these resources helped Spain become incredibly wealthy. As the native population decreased, they were effectively replaced with Europeans who migrated to the region to make money. New foods, previously unknown to Europeans, were found on the American continents; these included potatoes, tomatoes, avocados and chocolate.

The term 'New World' was originally applied to the Americas by Europeans, but of course it was not 'new' to the people who had lived there for centuries. The meeting of different cultures and the exploration of new lands by Europeans led to an increase of geographic knowledge. Communication was established between civilisations and as the centuries progressed, ideas and knowledge were shared, paving the way for the modern world in which we live today.

6.6 SkillBuilder activity USING HISTORICAL SOURCES

In pairs, **consider** the image in **SOURCE 6**. Your job is to **discuss** the value and limitations of the source for historians studying this topic.

STEP 1: Consider the following:

- Can you tell from the image who exactly it was who drew it?
- What do you know about how Aztec codices (folding books) changed after the arrival of the Spanish?
- What other information in this topic can you use to corroborate the information provided in **SOURCE 6**? Does this help its value?

SOURCE 6 An illustration from a sixteenth-century codex showing native Aztecs suffering from smallpox

STEP 2: Copy and complete this table to help organise your ideas.

Information presented in the source — what does it show? What does it tell us?	Other information in the topic that can support or challenge that information — does it present similar information?	Values of the source — how is it useful to historians? What can it reveal to us?	Limitations — what can it *not* reveal to us?

STEP 3: Discuss your thoughts as a pair, or **compare** with others in your class.

STEP 4: Answer this question in a paragraph individually: What are the values and limitations of **SOURCE 6** to historians, and how does what we know about the source impact its usefulness?

6.6 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 7	4, 5, 6	8, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** how Aztec codices changed after the Spanish conquest.
   A. Spanish and Latin text was added to the traditionally pictorial codices.
   B. Spanish and Latin text was removed from the traditionally pictorial codices.
   C. Spanish but not Latin text was added to the traditionally pictorial codices.
   D. Spanish but not Latin text was removed from the traditionally pictorial codices.
2. **Determine** whether the following statements are True or False.
   a. Spanish is spoken by approximately 550 million people around the world, but fewer than ten per cent of those people live in Spain.
   b. The Spanish conquest of the Americas led to a significant decline in the native population of Mexico due to the introduction of diseases and other factors.
   c. The Aztecs did not have a form of slavery before the arrival of the Europeans.
3. Why is Portuguese spoken in Brazil, but not elsewhere in South America?
   A. A vote by the people of Brazil in 1494 changed the official language from Spanish to Portuguese.
   B. The Spanish language slowly disappeared as new generations preferred Portuguese.
   C. Both Spanish and Portuguese were taught in school but Portuguese was much easier to learn.
   D. Brazil was allocated to Portugal as a colony under the Treaty of Tordesillas.
4. **Describe** what was done to the native people of the Americas who had not converted to Christianity.
5. **Explain** why Europeans migrated to the region of New Spain.

ANALYSE AND APPLY

6. **Explain** how the conquistadors defied the law that stated that slavery was not permitted in New Spain.
7. **Propose** why the term 'New World' could be misleading.
8. Read **SOURCE 2**.
   a. **State** the reasons Sherburne Cook offers for the decline in the Native American population.
   b. Sherburne Cook was not a historian by training but he did pioneer population studies of the native peoples of the Americas. He wrote widely on the subject of pre-conquest population levels. From this information, **determine** if you think **SOURCE 2** is a reliable source. **Justify** your response.

9. Examine **SOURCE 3**.
   a. **State** the estimated Native American population in Mexico in 1518.
   b. **Determine** by what year the population dropped to approximately 3 million.
   c. Using the graph, **identify** in what 15-year time period the population dropped most dramatically.
   d. **Explain** why this rapid decline might have slowed later.
10. **Explain** what **SOURCES 4** and **5** can tell you about the attitude towards the Aztec culture in modern-day Mexico.

Answers and sample responses for this topic are available online

LESSON 6.7 Inquiry: Spanish conquest exhibition

LEARNING INTENTION

By the end of this lesson, you should be able to use primary and secondary sources to **explain** the Spanish conquest of the Americas.

In pairs or groups, use up to ten primary or secondary sources to create a museum exhibition explaining the Spanish conquest of the Americas.

SOURCE 1 An illustration showing the landing of Columbus at San Salvador, 12 October 1492. Published by Currier & Ives, 1846.

1. Who raised the Spanish flag when Columbus landed?
2. When did Columbus reach San Salvador?
3. How was the Currier and Ives print made? Were the creators of the image witnesses to the event or would they have relied on other accounts to inform their image?

Before you begin

Use the **Inquiry rubric** in the Resources panel to guide and self-assess your task completion.

Inquiry steps

Step 1: Questioning and Researching

What sources best show the history of the Spanish conquest of the Americas? Decide which key concepts, like *conquest*, *resistance*, *culture* and *change*, will be the focus of your presentation.

Step 2: Using Historical Sources

Identify the sources for your exhibition. Use no more than ten sources, aiming for a mix of written, visual, primary and secondary sources.

Step 3: Historical Perspectives and Interpretations

Compare the sources you chose with those of your partner or group. **Analyse** your selections to ensure you have a total of no more than ten sources. Each source needs a caption of around 100 words. This should **describe** the source, why it's included, and its importance. If it's by a Spanish conquistador, mention how his perspective might influence the information.

Step 4: Communicating

Choose a title for your exhibition that reflects your main ideas. Bring your sources together and present them. You could print images and arrange them on a display board, or create a virtual museum online using a suitable program.

Complete your self-assessment using the **Inquiry rubric** or access the 6.7 exercise set to complete it online.

LESSON 6.8 Review

6.8.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

6.2 How do we know about the Spanish conquest of the Americas?

- Most contemporary records of the conquest were written by the Spanish.
- The sources were often subjective and focused on only one side of the story.
- Few first-hand accounts of pre-Spanish Aztec life remain.

6.3 Who were the Aztecs?

- Enough Aztec sources remain for us to learn that their culture was sophisticated and organised.
- The Aztec Empire often warred with its neighbours.
- Aztec religion was polytheistic, meaning they worshipped many gods.
- Similar agricultural techniques to those used by the Aztecs are still used in Mexico today.

6.4 How did the arrival of the conquistadors change the Americas?

- Spain and Portugal were rivals in sea power during the 1400s and 1500s.
- Columbus was looking for a new way to Asia when he found the Americas.
- He wasn't the first to discover the Americas, but he spread the news of the 'New World' in Europe.
- In the 1400s and 1500s, European empires grew quickly around the world.
- Encounters between Europeans and indigenous people often ended in conflict.
- After the fall of the Aztec Empire, other expeditions ended the Incan and Mayan civilisations.

6.5 What were the effects of conquest and colonisation?

- The Treaty of Tordesillas, signed in 1494, let Spain and Portugal decide where each could explore.
- The rise of British, French and Dutch empires caused conflict with Spain and Portugal over control.
- In the 1800s, calls for independence ended Spanish rule in New Spain.

6.6 What were the long-term legacies of conquest and colonisation?

- The Aztecs practised slavery, but it was different from what the Europeans introduced.
- In New Spain, slavery of native people was allowed if they didn't convert to Catholicism.
- As diseases killed many native people, new slaves were brought from Africa through the 'triangular trade'.
- The Spanish conquest of the Americas changed both continents and their people forever.
- Spain became rich from its American colonies.
- Disease caused a 90 per cent drop in Mexico's native population.

6.7 Inquiry: Spanish conquest exhibition

- Museum exhibitions are one of many ways to share information.
- Discuss and acknowledge different perspectives before choosing final display sources.

6.8.2 Key terms

codex a pictorial book
coexist live together at the same time in the same place
conquistador one of the Spanish conquerors of Mexico in the sixteenth century
hereditary passed from parent to child
missionary a person sent on a religious mission, especially one to promote Christianity in a foreign country
monopoly an organisation or group that has complete control of something
New World a term for the Americas during the early modern period
subjective based on personal feelings rather than on facts

6.8.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview:

What were the significant changes to the Americas as a result of the Spanish conquest?

1. Now that you've finished the topic, discuss your view on the question with a partner. Has your learning changed your opinion? How?
2. Write a short paragraph explaining your views on the inquiry question.

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Post-test	Online Post-test
eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary

6.8 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 7, 8, 13	2, 4, 6, 9, 11, 12	5, 10, 14, 15

REMEMBER AND UNDERSTAND

1. What is a *chinampa*?
   - **A.** An Aztec weapon
   - **B.** A type of Spanish ship
   - **C.** An Aztec agricultural technique
   - **D.** A slave who has been released
2. Which of the following were the great sea-power rivals of the fifteenth and sixteenth centuries?
   - **A.** Britain and France
   - **B.** Spain and Portugal
   - **C.** France and Spain
   - **D.** Britain and Portugal
3. Which of the following best describes the purpose of Columbus' voyage of 1492?
   - **A.** To discover a new sea route to Asia
   - **B.** To sail around the southern tip of Africa
   - **C.** To make war against the Portuguese
   - **D.** To locate the American continent
4. Approximately how long did it take for the Spanish to destroy the Aztec civilisation?
   - **A.** 2 months
   - **B.** 2 years
   - **C.** 10 years
   - **D.** 20 years
5. Chronologically, in which order (from first to last) did the indigenous American civilisations fall?
   - **A.** Mayan, Incan, Aztec
   - **B.** Aztec, Mayan, Incan
   - **C.** Incan, Aztec, Mayan
   - **D.** Aztec, Incan, Mayan

6. What was the Treaty of Tordesillas?
   A. A treaty between Britain and France to divide the world
   B. A treaty between the Spanish and the Aztec civilisation
   C. A treaty between Spain and Portugal to divide the world
   D. None of the above
7. Which of the following best describes the *encomienda* system?
   A. A system introduced by the Spanish to regulate labour and behaviour of the indigenous population
   B. A system by which slave traders were compensated for any deaths of slaves at sea
   C. A system used by the Aztecs to trade captured prisoners after battles with rival empires
   D. A trade system established by the Spanish to regulate trade across the Atlantic Ocean
8. The trade system that developed across the Atlantic Ocean was named after
   A. Cortés.
   B. Columbus.
   C. Montezuma.
   D. Pizzaro.
9. The sixteenth century saw the Native American population of Mexico fall from
   A. 10 million to 5 million.
   B. 5 million to 2 million.
   C. 35 million to 4.5 million.
   D. 25 million to 2 million.
10. The 'triangular trade' was the trade of slaves most associated with the
   A. Pacific Ocean.
   B. Atlantic Ocean.
   C. Mediterranean Sea.
   D. Indian Ocean.

ANALYSE AND APPLY

11. **Discuss** the reasons and consequences of the introduction of slavery to the Americas.
12. **Describe** the Columbian Exchange.
13. **Explain** why the Spanish were eager to explore the Americas.
14. **Describe** what the Aztec civilisation was like before the Spanish arrival.
15. **Discuss** why Columbus Day is considered by some to be a day of mourning rather than celebration.

Answers and sample responses for this topic are available online.

7 The Vikings

LESSON SEQUENCE

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LESSON 7.1 Overview

INQUIRY QUESTION

What was the way of life of the Vikings, how was their society structured and how did it change?

In recent popular culture, we see the Vikings as medieval bullies, crazed warriors with swords and axes. But is that the whole story?

The Vikings had a complex society. They were also farmers, explorers, inventors and traders. They played games, told stories during winter, and followed rules and regulations in their fair society.

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- **Pre-test**
  Online pre-test
- **eWorkbook**
  Customisable worksheets for this topic
- **Digital document**
  Key terms glossary
- **Video eLesson**
  The Vikings (c. 790–1066)

Eighth century
Advancements in shipbuilding allow Vikings to raid distant lands.

c. 850
Vikings begin to build permanent settlements in raided lands.

700 — 800

CE

787
First recorded Viking raid in Wessex, England.

793
Vikings raid monastery in Lindisfarne, England.

795
Vikings raid monastery in Iona, Scotland.

SkillBuilder

Use the SkillBuilder activities to develop these Historical concepts and skills:

- HISTORICAL QUESTIONS
- CHRONOLOGY
- USING HISTORICAL SOURCES
- CONTINUITY AND CHANGE
- CAUSES AND CONSEQUENCES
- HISTORICAL SIGNIFICANCE
- COMMUNICATING

930
Althing is established in Iceland.

995
King Olaf Tryggvason imposes Christianity on Norway.

1000
Leif Eriksson reputedly sails from Iceland to North America.

1066
Battle of Hastings and the last true Viking attack on England.

900 — 1000 — 1100 CE

985
Harald Bluetooth dies.

1000
Christianity is adopted in Iceland.

1014
Vikings lose Battle of Clontarf, ending their hold on Ireland.

1016
Danish forces conquer England.

LESSON 7.2 How do we know about the Vikings?

LEARNING INTENTION

By the end of this lesson you should be able to **identify** the origin, content, context and purpose of primary and secondary sources.

Tune in

Did you know that the Vikings hardly used written language and rarely wrote anything down? So how do we know about them today?

The answer lies in a mixture of runestones, sagas from their oral language, artefacts, buildings and archaeological findings. Most of what was written about the Vikings was from the people they attacked, which might lead to all kinds of questions. **SOURCE 1** is an example of runes being carved into stone.

1. **What are some of the questions that you might ask about the purpose of the runestones?**
2. **List these questions and brainstorm where you might be able to find the answers to explain how useful this stone is to us as historians.**

SOURCE 1 A stone from Lingsberg, Sweden, with runes carved on it. The words commemorate a Viking called Ulfrik 'who took two payments of geld in England'.

7.2.1 Runes and sagas

The Vikings didn't write much down until they became Christians in the 11th century. Before that, only Christian Church officials knew how to write. Vikings were **pagans**, so they didn't have anyone to record their history. They used **runes** instead, which were carved on bones or rocks.

Once the Viking Age ended, stories called **sagas** were written down. These were tales about Viking heroes, mostly fictional but with some real people. The oldest saga, *Beowulf*, was written in Old English by an English poet and set in Sweden and Denmark. It shows how Viking culture influenced Britain.

Vikings were known for their attacks across Europe from the 9th to 11th centuries, which made people see them as fierce warriors. The people they attacked wrote down these events, because they were **literate**, giving us historical records.

SkillBuilder discussion

Using historical sources

1. Look at **SOURCE 2**. What specific elements in the image depict the Viking hero Beowulf?
2. How does the illustration convey the culture and values of the Viking era?
3. In what ways does the artistic style of the illustration reflect the historical period in which the saga *Beowulf* is set?

SOURCE 2 An illustration showing a scene from the saga *Beowulf*. It shows Beowulf dying from his wounds after slaying a dragon.

BEOWULF DYING.

7.2.2 Early records of Viking raids

In 787 CE, about 400 years after the Romans left Britain, the country's first recorded Viking raid took place (see **SOURCE 3**).

SOURCE 3 An excerpt from the *Anglo-Saxon Chronicle*, written in Old English in the eighth century. The passage reads, 'And during his reign [King Beorhtric of Wessex] there first came three ships . . . Those were the first ships of the men of Denmark that attacked the people of England.'

And on his dagum cuomon ærest Þreo scipu... Þæt wæron Þa ærestan scipu Deniscra manna Þe Angel-cynnes land gesohton.

Viking raids soon became much more frequent and by around 850 CE the Vikings were using bigger raiding fleets and beginning to occupy permanent settlements. These settlements served as trading posts and as bases from which further raids could be launched against monasteries and villages that were far from the coast. Dublin in Ireland, for example, began as a Viking settlement.

7.2.3 Archaeological discoveries

The Viking Age is shrouded in legend and coloured by the gruesome accounts of victims of Viking raids. This is because, unlike the Greeks and Romans, the Vikings left few visible monuments. These were mostly mysterious standing stones. Some were carved with runes, signs and images; others were arranged to outline the shape of boats.

In the nineteenth century, archaeologists started digging up sites from the Viking Age. They looked at mounds and old settlements. One mound in Gokstad, Norway, was believed to have a king buried with his treasure.

When archaeologists dug into the mound in 1880, they found the remains of a Viking king and some treasure. Most of the treasure had been stolen long ago. The king was buried in a big Viking ship made of oak. Before this, people had only seen pictures of these ships on rocks and tapestries. In the last 150 years, other digs have helped us learn more about how the Vikings lived.

SkillBuilder discussion

Historical significance

1. What did archaeologists find in the King's Mound in Gokstad, Norway?
2. Why were Viking ships like the one found in the King's Mound important?
3. What types of settlements did Vikings establish, and what were they used for?

SOURCE 4 The King's Mound in Gokstad, Norway

7.2 SkillBuilder activity HISTORICAL QUESTIONS

1. **Examine SOURCES 1** and **2**.
2. **Create** your own historical questions to **analyse** each of these two sources. Try to come up with at least five questions for each source.
3. **Conduct** research to answer at least two of your questions for each source.

7.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4	5, 7, 8	6, 9, 10

REMEMBER AND UNDERSTAND

1. The Vikings came from Scandinavia. **Identify** which of the following correctly describes them. **Select** all that apply.
   A. Merchants
   B. Farmers
   C. Traders
   D. Seafarers
   E. Raiders
2. **Identify** the year in which the first recorded Viking raid in Britain occurred.
   A. 787 BCE
   B. 400 BCE
   C. 400 CE
   D. 787 CE
3. **State** whether the following sentence is True or False. The Vikings were Christians prior to the eleventh century.
4. **Recall** the tradition Vikings used to pass on their stories.
5. **Explain** what the sagas are.

ANALYSE AND APPLY

6. Read **SOURCE 3**.
   a. **Describe** its origins (where and when it was written).
   b. **Explain** whether it should be considered a primary source or a secondary source, and why.
   c. **Describe** its perspective (point of view) on the Vikings.
   d. **State** the conclusions you could draw about one aspect of the Viking Age from this source.
7. **Propose** a reason that the Vikings left fewer visible monuments than the ancient Greeks or Romans.

EVALUATE AND COMMUNICATE

8. **Discuss** why folktales have developed around some of the sites of Viking settlements.
9. **Evaluate** the importance of the discovery of Viking ships in burial mounds. **Explain** what knowledge archaeologists would have gained from this discovery.
10. **Discuss** whether the history of the Vikings may focus on the experiences of other cultures that came into contact with them. **Explain** why or why not.

Answers and sample responses for this topic are available online.

LESSON 7.3 How did the geography and climate of Scandinavia influence the Viking way of life?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the geography and climate of the Viking homelands and how it influenced their way of life.

Tune in

This large, modern cruise ship is touring some of the spectacular scenery in Norway.

1. **Using SOURCE 1, list four geographical features that you can observe.**
2. **Norway is in northern Europe. Predict what this same scene might look like in winter.**

SOURCE 1 A modern cruise ship in Geiranger Fjord, Norway

7.3.1 Geography and climate

The harsh geography and climate in Scandinavia greatly impacted Viking life. Limited farming areas and bitter cold dictated where they lived and what they ate. These conditions drove their greatest legacies: travel, trading and conquest.

Much of Norway and parts of Sweden are mountainous and rocky, making farming difficult. Crops need arable land, and animals need accessible food sources.

SOURCE 2 A map of Scandinavia at the time of the Vikings

Only three per cent of Norway's land was good for farming. Vikings lived where they could grow food. In Sweden, they lived in the south and centre, where the best farmland was found. In Denmark, they farmed the eastern part because the west was too sandy.

Water was very important too. The Norse Vikings lived by the **fjords**, deep canyons protected by many small islands. This gave them a lot of seafood. Water also kept Vikings separated from the rest of Europe, so they developed their own, distinct culture. They became great boatbuilders and sailors. This helped them raid distant lands.

The climate in Scandinavia was better than the geography. Summers had up to 20 hours of sunlight. The **Gulf Stream** kept the waters warm and stopped harbours from freezing in winter, which was very important for the Vikings.

SOURCE 3 Translated extract from the *Orkneyinga Saga*, an Icelandic saga written in the 1100s

Winter he would spend at home on Gairsay; where he entertained some 80 men at his own expense... In spring he had... a great deal of seed to sow... Then when his job was done he would go off plundering in the Hebrides and in Ireland on what he called his 'spring-trip', then get back home just after mid-summer where he stayed until the cornfields had been reaped and the grain was safely in. After that he would go off raiding again and never come back until the first month of winter had ended.

SkillBuilder discussion

Using historical sources

1. Read **SOURCE 3**. How does the extract from the *Orkneyinga Saga* provide insight into the seasonal activities and lifestyle of the Vikings?
2. What does the passage reveal about the Vikings' agricultural practices and their dependence on seasonal cycles?
3. In what ways does the translated extract reflect the Vikings' adaptation to their geographical and climatic conditions?

SOURCE 4 Sognefjord, Norway. This fjord is 160 kilometres long.

7.3.2 Beyond Scandinavia

Many historians have questioned why the Vikings left their homelands to go on raids and establish colonies in other regions. A range of perspectives have emerged:

- There was not enough farmland to support a growing population. Vikings had to raid, trade and explore just to survive.
- The Vikings left their homelands because they were searching for more arable land. This led them to migrate to places like Greenland, the Faroe Islands and Iceland, and conquer places like Normandy and modern-day Russia.
- Some Vikings fought against their own kings and chieftains and fled overseas as a result. With their kings owning most of what little land was available, some Viking people might have desired to search for their own land.
- Vikings noticed and took advantage of the bickering among the states of Europe, raiding them and eventually seizing land that the states could not defend.
- There was great wealth in many of the places that the Vikings raided. When they took these goods, they gained the wealth and associated higher social status.

With few written records from the Vikings' perspective, it is difficult to say which of the many theories is the most accurate. It could even be a combination of many of the reasons.

7.3 SkillBuilder activity QUESTIONING AND RESEARCHING, USING HISTORICAL SOURCES

In many medieval societies, the places they lived in shaped the way people lived as they adapted to surviving and thriving there. Think about what you have learnt about the factors that shaped Viking life and how you can represent this visually.

1. Use **SOURCE 2**, the internet and your library to **construct** a map that shows geographical features of Scandinavia. Your map should include mountain ranges, key bodies of water and significant forests.
2. a. Below your map, draw symbols or images that represent how different geographical factors influenced the Viking way of life.
   b. **Explain** what each of your symbols or images demonstrates about how the geography and climate patterns of the Viking homelands influenced their way of life.

7.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 5	4, 6, 7, 9	8, 10

REMEMBER AND UNDERSTAND

1. **Identify** how the mountainous landscape affected Viking farms.
   A. The Vikings invented 'vertical farms'.
   B. It meant that there was not much land available for growing crops.
   C. It meant that crop yields per acre were very low.
   D. It resulted in the Vikings not establishing farms.
2. **Identify** whether the following is True or False.The Vikings became expert boatbuilders because the inland regions were too mountainous to travel.
3. **Identify** what fjords protected the Vikings from.
   A. Flooding, because of their depth
   B. Attacks
   C. Tsunamis
   D. Atlantic storms
4. **Explain** the meaning of *arable land*.
5. **Recall** what benefits the Scandinavians gained from the Gulf Stream.

ANALYSE AND APPLY

6. **Compare SOURCES 2** and **4**. **State** which source is more useful. **Justify** your response.
7. a. Using the information in **SOURCE 3**, **explain** how the Vikings used their time in the different seasons by completing the table below.

Season	General activity
Winter	
Spring	
Summer	
Autumn	

   b. **Explain** how the climate and associated seasons affected the Viking way of life.

EVALUATE AND COMMUNICATE

8. **Analyse** to what extent a lack of arable farmland was the cause of Viking movement beyond Scandinavia.
9. Imagine that you are a Viking from the ninth century CE. **Construct** a speech persuading your fellow Vikings to embark on a raid on a nearby country. The elements of the speech should include:
   - a clear opening
   - addressing fellow Vikings
   - clear arguments
   - closing.
10. a. **Explain** why the Vikings were isolated from the rest of Europe.
    b. **Discuss** the effects that this had on the development of their culture.

Answers and sample responses for this topic are available online.

LESSON 7.4 Who were the Vikings and how did they live?

LEARNING INTENTION

By the end of this lesson you should be able to **identify and explain** the roles and relationships in Viking society, as well as describe their way of life.

Tune in

SOURCE 1, from a Viking village museum in Denmark, shows actors representing Viking people who are getting on with their daily life.

Using the following thinking routine, explore what they are doing in the photograph.

See: What you can see in the image?

Think: What does it makes you think about what they are doing?

Wonder: What questions about their lives does this raise in your mind?

Share your ideas in a small group or a class discussion.

SOURCE 1 A recreation of daily life as a Viking

7.4.1 Viking social structure

Although Vikings are often thought of as raiders, most were actually farmers who lived in **longhouses** with their families. They needed to store enough food to survive the long, cold winters. Viking farms were spread out, and their society had a clear structure with powerful leaders called jarls, who owned the largest farms.

Viking society had three main layers: earls or jarls (leaders), karls (freemen like farmers and skilled workers), and thralls (slaves). Jarls were rich, owned land, and led raids. Karls were freemen who could farm, vote, hunt, own slaves and join raids. Thralls were at the bottom; they were usually captured in raids or trades and couldn't own land or choose their work. Their owners could treat them however they wanted. The Vikings believed that the god Rig created all three classes, as told in the saga *The Lay of Rig* (see **SOURCE 2**).

SOURCE 2 An extract from the *Lay of Rig* in which the creation of the thralls is described

Great-grandmother bore a swarthy boy; with water they sprinkled him, called him Thrall. Forthwith he grew and well he throve, bur tough were his hands with wrinkled skin, with knuckles knotty and fingers thick; his face was ugly, his back was humpy, his heels were long. Straightway'gan he to prove his strength, with bast a-binding loads a-making, he bore home faggots the livelong day. There came to the dwellings a wandering maid, with wayworn feet and sunburned arms, with down-bent nose,- the Bond-maid named. She sat her down in the middle of the floor; beside her sat the son of the house: they chatted and whispered, their bed preparing — Thrall and Bond-maid — the long day through. Joyous lived they and reared their children. Thus they called them: Brawler, Cowherd, oor and Horsefly, Lewd and Lustful, Stout and Stumpy, Sluggard, Swarthy, Lout and Leggy. They fashioned fences, they dunged the meadows, swine they herded, goats they tended and turf they dug. Daughters were there, — Loggy and Cloggy, Lumpy-leggy and Eagle-nose, Whiner, Bondwoman, Oaken-peggy, Tatter-coat and the Crane-shanked maid. Thence are come the generations of thralls.

SkillBuilder discussion

Using historical sources

1. Refer to **SOURCE 3**. What were the three main layers of Viking society?
2. Who were the jarls and what were their main responsibilities?
3. How were thralls typically acquired and treated in Viking society?

SOURCE 3 The hierarchy in Viking society: the jarl, the karl and the thrall

7.4.2 Equal rights?

Women were important in Viking communities. Some had control over their households and were buried with their belongings in longboats. The Oseberg ship burial is a famous example, where a respected woman, sometimes called 'Oseberg Queen', was buried in a grand ship.

Viking women often had keys, showing they managed the pantry, which was crucial for surviving the harsh winters. Women also went on sea voyages and even participated in Viking raids. In 2017, a grave of a high-status warrior turned out to be a woman's. She was buried with a horse, weapons and a board game.

Viking women had more rights compared to women in other European countries at the time. They could own land, marry as equals, divorce if they wanted, and were protected by law from unwanted advances. There is some evidence that women fought as warriors.

We know little about Viking children. It is likely that girls and boys helped with farm chores, milking cows, making clothes, preparing food and hunting. There were no schools, so boys were probably taught skills by their fathers, such as handling weapons, building, and sailing boats.

SOURCE 4 An illustration of a Viking grave

SkillBuilder discussion

Using historical sources

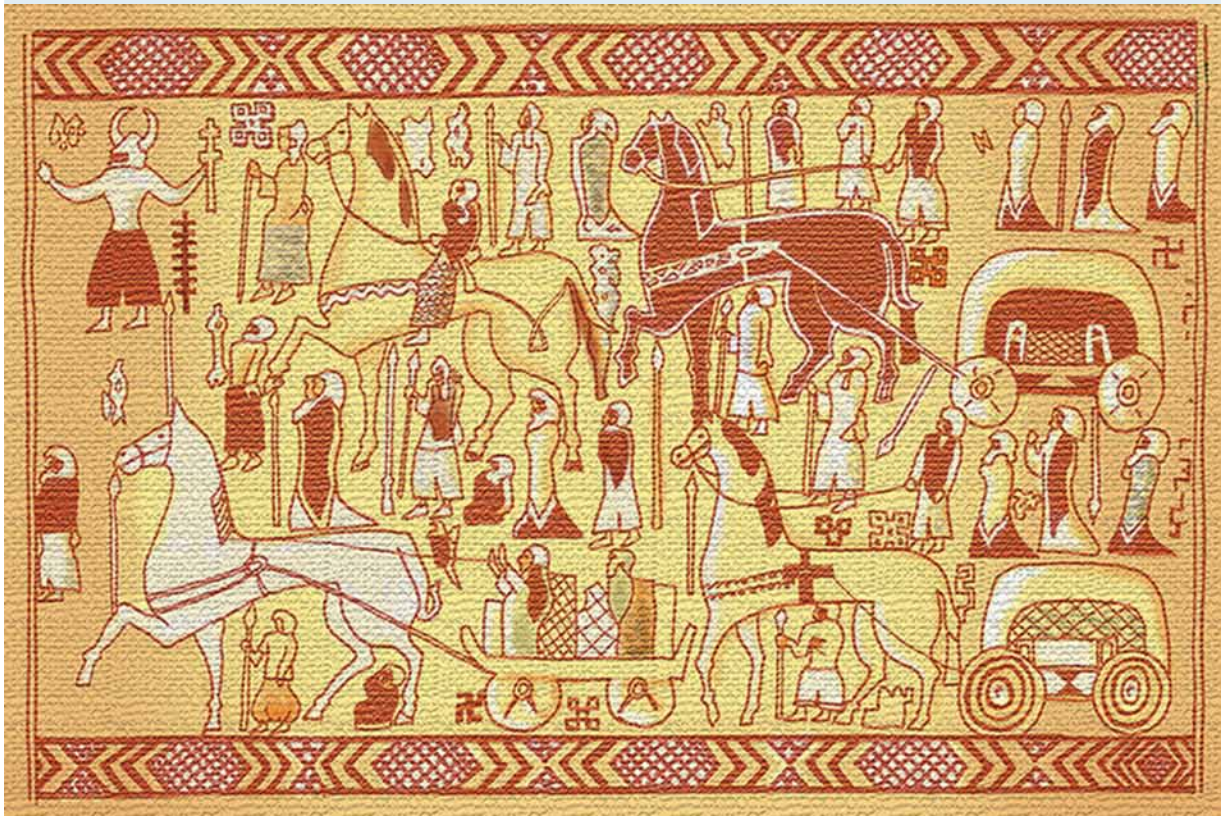
1. **Discuss** what you can see in the illustration of a Viking grave.
2. Use the **SOURCE 4** image and text to **suggest** why the items were buried with a person.

7.4.3 What were Viking farms like?

Viking farms were usually a cluster of buildings around the longhouse where the family lived. Early longhouses included living quarters, animal stalls, a workshop, and storage for food and tools. Later, the longhouse was just for living, and other buildings were used for different purposes. Hired hands and slaves helped run the farm, with slaves doing the least desirable jobs.

Villages were rare. Farms might group together along trade routes, but most Viking farms were isolated and had to be self-sufficient. Viking farmers needed to be skilled in carpentry, blacksmithing, crop cultivation and animal breeding. They built their own longhouses, boats, carts and tools.

SOURCE 5 A **reconstruction** of a Viking **tapestry** showing various everyday activities. The tapestry was reconstructed from pieces that were found buried with the Oseberg ship.



SkillBuilder discussion

Using historical sources

1. Study **SOURCE 5**. What does the reconstructed Viking tapestry show?
2. Where is the reconstructed Viking longhouse located?
3. What natural event helped preserve the original Viking longhouse?

7.4.4 Livestock and crops

Viking farmers kept cattle, horses, sheep, goats and pigs for meat, dairy products, wool and skins. Horses and oxen were also used for transport. In summer sheep and cattle were taken to higher pastures. But winter was severely cold, so livestock tended to be kept indoors and fed with hay. A poor harvest could mean starvation for both the animals and the Vikings. Besides hay, archaeologists have also found evidence of grain crops like barley, rye and oats, as well as vegetables such as onions, peas and cabbages. **Flax** and **hemp** were grown to make **linen** and rope for the rigging of boats.

SOURCE 6 Reconstruction of a Viking longhouse in Stöng, Iceland. The original building is fairly well-preserved because it was buried under volcanic ash when Mount Hekla erupted in 1104.

SOURCE 7 An archaeological site showing the foundations of a Viking longhouse

7.4.5 Going on a Viking raid

Because of the challenging environment the Vikings lived in, they often sailed out to raid what they needed from others. Those that went on these journeys were called *vikings*, and it has been suggested that this is where the name originates from. During these raids, the Vikings would gather precious items such as gold to trade with, but also captives who would become thralls upon return to Scandinavia. A successful raid would also add to their honour as warriors among their peers.

7.4 SkillBuilder activity USING HISTORICAL SOURCES, HISTORICAL QUESTIONS

The Lay of Rig (extract in **SOURCE 2**) is an old Norse poem, originally from an oral storytelling tradition. It has been hypothesised that it is from between the tenth and thirteenth century CE, but was around in oral form for much longer.

The poem tells the story of the birth of the Viking humankind from the god Rig. It describes the creation of the different classes, from earls to karls (or churls), to the lowest group, the thralls. Its greatest value is in what it allows historians to infer about the different social classes and attitudes towards them.

1. In dot-point form, **construct** a series of questions that you could ask about this source to **determine** its historical significance. There are two listed for you already:
   - Is it a primary or secondary source?
   - What words are used to describe the baby Thrall? What do these imply?
2. When you have listed your historical investigation questions, swap with another student or group and compare your answers. These will give you an insight into the writer's views of the thralls.
3. If you are interested, you can **investigate** more and find many versions of this poem on the internet. You can ask and answer questions about the karls and earls as well.

7.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5, 8	3, 6, 9	4, 7, 10

REMEMBER AND UNDERSTAND

1. Viking society was structured into three main layers. **Identify** the three main classes of Viking society.
   A. Jarls (or earls)
   B. Karls
   C. Fjords
   D. Thralls
   E. Monarchs
   F. Rigs
2. From the following statements, **select** all that describe the limits faced by a thrall.
   A. The thralls were slaves and therefore their owners' property.
   B. Thralls could not own land.
   C. Thralls could not move freely from place to place or choose their own work.
   D. Thralls could buy their freedom, but usually could not afford it.
   E. Thralls' owners could kill them without consequences.
3. **Recall** what type of work the karls did.
4. **Consider** the places where Vikings lived.
   a. **Explain** why Vikings had to be self-sufficient.
   b. **Explain** what they needed to be able to do to survive.
5. Complete the following sentences.

   Viking farmers kept a range of animals including sheep and _____ for food and products such as dairy and leather. They grew _____ such as barley, rye and oats as well as plenty of _____ to make sure that they did not starve. They also grew crops such as _____ to make the linen and ropes for their boats.

ANALYSE AND APPLY

6. **Examine** the tapestry in **SOURCE 5**.
   a. **State** where it was discovered.
   b. **Identify** four things we are able to find out from this source about how the Vikings lived.

7. **SOURCE 6** is a reconstruction of a Viking longhouse. **Determine** what might be problematic about reconstructions for historians.
8. **Examine SOURCE 7**.
   a. **Determine** whether **SOURCE 7** is a primary or secondary source.
   b. **Explain** what we can learn about Viking farms from **SOURCE 7**.

EVALUATE AND COMMUNICATE

9. Refer to **SOURCES 6** and **7**.
   a. **Explain** to what extent these sources provide supporting evidence about longhouses.
   b. **State** which source you see as the most reliable. **Justify** your answer.
10. **Compare** the role of Viking women to that of contemporary Australian women. Write a list of the similarities and the differences.

Answers and sample responses for this topic are available online.

LESSON 7.5 What was the early Viking religion and how did it change?

LEARNING INTENTION

By the end of this lesson you should be able to:
- **identify** the role of gods and the consequences of the adoption of Christianity
- **explain** the system of the Vikings' religious beliefs.

Tune in

Viking gods, heroes and mythology have fascinated people for many years, right up to the modern day.

1. **Brainstorm the different films, TV shows, games or literature you can name that might be based on Viking mythology.**
2. **Why do you think Viking mythology is still so popular today?**
3. **Discuss how historically accurate the depiction in SOURCE 1 is. From where might the artist have developed their ideas?**

SOURCE 1 An artist's recreation from the myth of a frost giant attacking Norse warriors

7.5.1 Early Viking pagan religion

Christian Europeans who were raided by Vikings saw them as **heathens** — people who did not believe in God. Viking brutality was considered a mark of paganism. Initially, Vikings followed a pagan religion but were gradually influenced by Christianity, raising the question of whether this lessened their brutality. Viking religion encompassed both paganism and Christianity.

Evidence of pagan Viking religion is scarce, and the sagas, written two hundred years after the Viking Age, likely contain exaggerations. Pagan Viking religion was **polytheistic**; Vikings worshipped numerous gods and believed their fortunes depended on them. Animals and people, even chieftains, were sacrificed to keep the gods happy.

Viking myths feature gods living in Ásgarðr (Asgard), birds and animals with human qualities, and giants, dwarves and trolls. These stories explained the world around them, like the seasons, stars, and the difference between people and animals.

Did you know?

The Sigurd stones are a group of ancient runic inscriptions found in Sweden. They include five or six runestones, two natural rocks, a baptismal font, and a picture stone. These stones depict scenes from the legendary Norse hero Sigurd's saga, particularly his slaying of a dragon. The carvings are from the Viking Age and are some of the earliest representations of the Sigurd legends.

SOURCE 2 Line drawing detail of all of the images on the Ramsund Rock. The runes on the dragon's body are a woman's dedication to the memory of her husband.

7.5.2 Early Viking gods

Two of the main Viking gods were Óðinn (called Odin today) and Þórr (Thor) see **SOURCE 4**. Odin figures prominently in the sagas as a deity who rules from Valhöll, the Hall of the Slain, who would send his Valkyries (war-maidens) to choose great warriors who died on the battlefield and bring them to him. Thor was the god of thunder and farming and was represented by the hammer he wielded. However, beyond this, the sagas contradict each other. Some accounts place Odin as the ruling god, while others put Thor as the ruling god.

SkillBuilder discussion

Using historical sources

1. What is depicted in the line drawing on the Ramsund Rock?
2. How does the line drawing detail contribute to our understanding of Viking myths and legends?
3. In what ways does the Ramsund Rock reflect the cultural and religious beliefs of the Vikings?

SOURCE 3 Part of the Ramsund Rock, showing a scene from a Viking myth about a hero called Sigurd (Sigurðr in Old Norse) who slew a dragon

Scenes from Viking myths and legends appear as stone carvings. Many were in temples that have long since disappeared. Travellers from other lands sometimes made passing reference to Viking worship but gave few details.

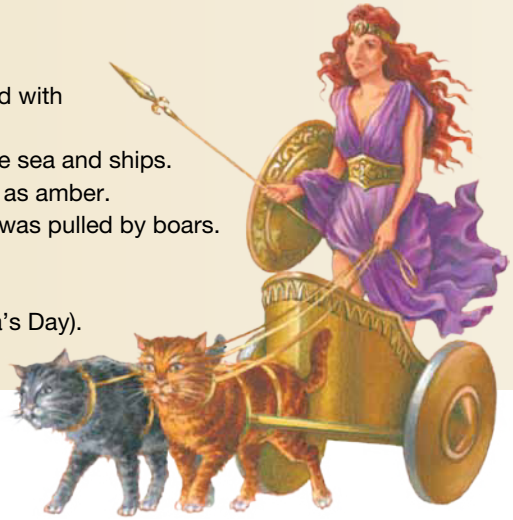
SOURCE 4 Some of the more significant pagan deities were Odin, Freya and Thor.

ODIN

- Chief god; and god of wisdom, war, death and poetry
- Married to Frigg. Sons included Thor (god of thunder and lightning) and Balder (god of light)
- Long grey beard and one eye. He traded one eye to drink at the well of wisdom.
- Invented the runes, using them to communicate and to do magic tricks
- Rode an eight-legged horse called Sleipnir
- Had a spear that always hit its target, and a bow that fired ten arrows at once
- Had two ravens which flew into the world every day to collect information
- Thought to have inspired the name 'Wednesday' (Woden's Day)

FREYA AND FREY

- Freya was the goddess of love, fertility and war.
- Frey was the god of crops and fertility and was associated with prosperity and abundance.
- The twin siblings were the children of Njord, the god of the sea and ships.
- When Freya lost her husband, her tears fell to the ground as amber.
- Freya drove a chariot pulled by cats, while Frey's chariot was pulled by boars.
- Freya wore a feather coat when she wanted to fly.
- Frey had a ship that he could fold up into a bag.
- Freya is thought to have inspired the name 'Friday' (Freya's Day).
- Frey lived in the homeland of the elves.



THOR

- The eldest son of Odin, and god of thunder and lightning
- Made crops grow and fought giants to protect people from evil
- A quick-tempered, very strong and tall man, with red hair and beard and wild eyes
- Drove a cart pulled by two giant goats. Vikings believed that thunder was the sound of its turning wheels.
- Threw a hammer called Mjollnir (caused lightning) which always hit its target and returned to his hand
- Wore iron gloves so he could throw and catch his mighty hammer
- Wore a belt called Megingjard, which made him ten times as strong
- Married to Siv, the goddess of the cornfields
- Thought to have inspired the name 'Thursday' (Thor's Day)

SkillBuilder discussion

Historical significance

1. What qualities does **SOURCE 4** suggest that the Vikings admired?
2. Give examples of the roles that animals played in Viking mythology. Why do you think this is?

7.5.3 Death — beliefs and practices

The Vikings believed death was the start of a journey to another world. Warriors who died in battle went to Valhöll, Odin's great hall, where they fought by day and feasted by night until Ragnarök, a final battle.

Those who didn't die heroically went to Hel. Life in Hel was similar to Earth, but bad people were punished. The story 'The Seeress's Prophecy' describes oath breakers being punished with poison and walking through rivers of sharp swords.

Burial and cremation were both used. Vikings believed the dead needed items they used in life, so they were buried or burned with food, drink, utensils, weapons, tools, jewellery, animals, and even slaves. Funeral rituals were elaborate.

Vikings buried their dead in mass graves, pits, wagons and boats. Ships were important in their funerals, symbolising the journey to the afterlife.

It was important to Vikings that their name be remembered after death, as this provided a way in which they could live forever. Burial sites were often marked with a runestone, a cairn (pile of rocks) or, more commonly, a large earth mound called a howe.

SOURCE 5 Some grave sites are marked by runestones arranged in the outline of a ship's hull. These were probably the graves of those who could not afford a boat.

SkillBuilder discussion

Using historical sources

1. Look at **SOURCES 5 and 6**. What do they tell you about burial customs of the Vikings?
2. What does this suggest about the Viking belief in the afterlife?
3. Discuss how Viking burial traditions are both similar and different to those of today.

SOURCE 6 Many Viking funeral ships were buried whole. Some, however, were first burnt. Then the charred remains were covered with a mound of earth.

Cremation was another common burial practice for pagan Vikings. The Arab traveller Ibn Fadlan, who attended a ship-burning funeral on the Volga in 922, wrote that Vikings believed that burning a body released the dead person's spirit faster than burying it could do. Hence, it was a kind act. The sagas describe tales in which the dead were cremated in treasure-filled ships pushed out to sea. There is as yet no archaeological evidence to confirm this practice.

7.5.4 The influence of Christianity

Gradually, the Vikings were exposed to Christianity and began accepting the Christian God among their deities. Eventually, most Viking leaders adopted Christianity exclusively. Early records by Anglo-Saxon monks show that the Vikings attacked monasteries in England, Scotland and Ireland. They looted valuable items like silver plates, golden crucifixes, goblets and coins. These attacks brought the Vikings into contact with Christianity, and captured slaves likely spread their beliefs to new lands.

SOURCE 7 An extract from Alcuin of York's letter to the Bishop of Lindisfarne consoling him on the terrible Viking raid

The intimacy of your love used to rejoice me greatly when I was with you; but conversely, the calamity of your tribulation saddens me greatly every day, though I am absent; when the pagans desecrated the sanctuaries of God, and poured out the blood of saints around the altar, laid waste the house of our hope, trampled on the bodies of saints in the temple of God, like dung in the street.

The coming of Christianity to Scandinavia

By the end of the Viking Age, most of the Scandinavian countries had adopted Christianity as their main religion. Evidence suggests the conversion to Christianity was a gradual process. There was a long period of overlap where old pagan and Christian practices mingled.

SOURCE 8 A Viking gravestone from Yorkshire in England. It combines both Christian and pagan symbols.

7.5.5 Christian leadership

Kings and chieftains taking up the new Christian faith also did much to hasten the path to conversion. With many of the powerful leaders of Europe already converted to Christianity, it made political sense for Scandinavian rulers to convert to the religion of their allies. King Olaf Tryggvason imposed Christianity on Norway in 995 CE. The sagas tell of him destroying pagan temples. Such aggression suggests there was resistance to the spread of Christianity. By the time Tryggvason's successor, St Olaf, had finished his work of converting Norway and Iceland to Christianity, the Christian faith had taken firm root in the Viking world.

7.5 SkillBuilder activity **COMMUNICATING**

Imagine you are one of the gods featured in this lesson. **Create** a short tale that describes one day in your life where you visit Scandinavia and meet some Viking warriors. **Describe** the social group and lives of the people that you meet, as well as where they come from and what they are doing on this day. What is their reaction to you?

Your tale should be consistent with the description given above for your character. Don't mention your name in the story. Put completed stories in a box. Select one that is not your own and see how long it takes you to recognise the Viking god.

7.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 7, 8, 9	5, 6, 10

REMEMBER AND UNDERSTAND

1. **Identify** what influence the raids on monasteries had on the Vikings in terms of religion.
   A. The raids brought the Vikings into contact with Buddhism.
   B. The raids brought the Vikings into contact with atheists.
   C. The raids brought the Vikings into contact with Christianity.
   D. The raids brought the Vikings into contact with Zen.
2. **Match** the Viking god to their purpose by placing the corresponding letter in the answer column.

Viking god	Responsibility
Odin	a. Goddess of cornfields
Thor	b. God of light
Freya	c. God of thunder and lightning
Balder	d. God of wisdom
Siv	e. Goddess of love and fertility

3. **Determine** whether the following statements are True or False.
   a. *Polytheistic* means the worship of a single god.
   b. Those who were victims of the Vikings' violent raids believed them to be uncivilised heathens.
   c. Vikings had strict burial rituals and every fallen Viking was buried in a boat.
4. **Explain** how we know what we do about pagan Viking religion. **Explain** whether we should trust these sources.
5. **Explain** whether the conversion to Christianity was a slow process or a fast change. Support your answer with an explanation.

ANALYSE AND APPLY

6. **SOURCES 2** and **3** show the Ramsund Rock, which contains a scene from Viking mythology carved into a slab of rock in Sweden.
   a. **Summarise** the purpose of this carving.
   b. **Clarify** why the Vikings told tales about heroes such as Sigurd.
7. **Demonstrate** how historians know about Viking burial practices.
8. **Examine SOURCES 5** and **6**. **Determine** how we can tell that the person buried in the boat in **SOURCE 6** is likely to have been wealthier than the person buried in the runestone 'boat' in **SOURCE 5**.

EVALUATE AND COMMUNICATE

9. **Describe** how Christianity spread throughout Scandinavia. **Explain** what methods were used to spread the religion.
10. **Evaluate** the significance of the adoption of Christianity during the Viking period. In your answer, support your ideas with specific examples of how it affected Viking actions and beliefs.

Answers and sample responses for this topic are available online.

LESSON 7.6 What was the impact of the developments in longboat technology?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the significance of the construction of longboats and their role in exploration.

Tune in

The Oseberg ship was found in a large mound on farmland in Norway. When archaeologists excavated it early in the twentieth century, they discovered that it was a ninth-century CE burial site. Found buried with the ship were the skeletons of two women and many artefacts from the time.

1. **Brainstorm all the reasons why you think the ship was buried on the farmland.**
2. **The two skeletons were women, one of whom appeared to be about 50 and the other about 80 years old. The older woman's clothes were quite luxurious. What can you hypothesise about the two women?**
3. **Looking at SOURCE 1, what conclusions can you draw about Viking shipbuilding?**

SOURCE 1 The Oseberg ship in the Viking Museum in Norway

7.6.1 Technological developments

Vikings are well known for their raids, but such raids were possible due to innovation and invention. Technological advancements allowed them to develop longboats, which were essential for travelling to distant shores.

For centuries, Scandinavians used large rowboats. In the eighth century CE, they introduced key innovations: a keel, a wool or linen sail, and a rudder. These improvements allowed longer ocean voyages and distant attacks.

Replicas of the Gokstad ship showed the speed of these longships; one sailed from Norway to Canada in 1893 and again in 1998. In both cases the journey took less than a month.

The Gokstad ship was 23 metres long, 5 metres wide, and had 32 rowers. It proved Viking dragon ships were not exaggerated. An even longer ship, over 30 metres, was found in Denmark, and could fit 60 rowers.

Despite their size, these ships had shallow hulls, about two metres deep, allowing them to be rowed in various waters and easily dragged onto beaches. Smaller ships were sometimes carried overland, enabling travel between waterways in modern-day Russia.

SOURCE 2 The Gokstad ship, which was excavated from a burial mound in Norway in 1880

SOURCE 3 A reproduction of a dragon ship carved on stone from Gotland, Sweden, in the eighth century CE

SkillBuilder discussion

Using historical sources

1. What key innovations did the Scandinavians introduce to their longboats in the eighth century CE?
2. Discuss the purpose of the carved dragon heads on Viking longships.
3. How did the design of the Viking longships enhance their capabilities for warfare and raids?

Such Viking vessels were built for raids and warfare. They are called longships because of their slender shape. Sometimes they are called dragon ships because the carved head of a mythical monster was occasionally mounted on the prow of the boat. It is remarkable that the timber for these ships was cut with only an axe. Unlike in modern shipbuilding, the Vikings constructed the hull first and then cut and inserted the frame.

Did you know?

The longest Viking ship ever found, described in this section, was sunk deliberately in Roskildefjorde along with other ships. It is believed this was an attempt to create a barrier against enemy ships trying to attack the harbour. Although it was sunk in Denmark, evidence suggests the boat was built in Dublin, Ireland.

7.6.2 Design and navigation

The prows of Viking ships were often elaborately decorated with figureheads representing dragons (see **SOURCES 2** and **3**) or serpents (see **SOURCE 1**). However, the Oseberg ship, shown in **SOURCE 1**, may not be a typical longship because it was found in the excavated burial site of a Norwegian Viking queen. If you look closely, you will see that its stern also features a finely carved pattern of smaller dragons and vines. Another important feature of the longship is that the woollen sails had patterns, as can be seen in **SOURCE 3**. It is likely this crisscross stitching had a practical purpose — it gave the sails the strength to withstand strong winds.

SkillBuilder discussion

Using historical sources

1. Read **SOURCE 4**. Where do you think the warriors were going?
2. Why did the king not accompany them?
3. How was the ship powered?

SOURCE 4 From the saga *Beowulf*, translated into modern English

Under the sea-girt cliffs the shining ship was readied, laded with coats of mail, swords and gleaming war harness. Bidding farewell to their king, the sturdy warriors embarked... [leaning] to the oars.

Like a bird, like a swallow, the glistening ship sped forward. She cut a path through the clear, green sea, her prow wreathed in bubbles and foam. Across unknown waters the light floater lunged and ploughed into the swells. The salt spray blew strong on the warriors' foreheads.

What is even more amazing is that Viking ships could cross vast seas without any of the navigation instruments used today. Vikings knew enough about the weather patterns to know when to put to sea, and they navigated by the positions of the stars and by the height of the sun above the horizon.

7.6 SkillBuilder activity USING HISTORICAL SOURCES

SOURCE 5 Viking ship replica, Pegwell Bay, Kent, United Kingdom

1. Using the information conveyed in the sources in this lesson, **create** a labelled image of a Viking longship. Label the following parts of the Viking longship, clearly identifying the innovations that were specifically Viking: keel, rudder, oars, hull, prow, sails.
2. a. After this, as a class, **create** the shape of the longest Viking ship found so far. It is 30 metres long and 3.2 metres wide. Do this outside using school bags. Students should sit in places where the rowers would have sat. One bag in the middle of the ship will represent the position of the mast. Don't forget to have someone controlling the tiller. Vikings and their ancestors used rocks in an exercise similar to this to begin creating their ships.
   b. **Discuss** what you found interesting or surprising about the size and shape of the longship.

7.6 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4, 5	3, 6, 8	7, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** the correct options to complete the sentence.
   The longest Viking longship found so far is **10** / **20** / **30** / **40** metres long and **20** / **30** / **40** / **60** rowers would have been needed to row it.
2. **Identify** which of the following were the three most important developments in Viking shipbuilding in the eighth century.
   A. The keel
   B. Woollen or linen sails
   C. Steering wheels
   D. An oar that could be used as a rudder to aid steering
3. **Explain** why it was a benefit for Viking longboats to have hulls that were only 2 metres deep.
4. **State** whether the following sentence is True or False. The Vikings cross-stitched their sails because it strengthened the wool or linen and prevented it from tearing apart in strong winds.
5. **Recall** how the Vikings navigated across the seas.

ANALYSE AND APPLY

6. **Compare** the photo of the excavated Gokstad ship in **SOURCE 2** with the replica in **SOURCE 5**. **Propose** how the people who built the replica knew what the details of this ship would look like.
7. Read **SOURCE 4.** From the saga *Beowulf*, translated into modern English.
   a. **Select** the information we can gather from **SOURCE 4** about Viking longships and **interpret** it.
   b. **Decide** what the benefits are of reading a translated version of a text. What might be some of the limitations or problems?
8. **Compare SOURCE 3** and **SOURCE 1**. **Explain** how the discovery of the Oseberg ship demonstrates that the carving in **SOURCE 3** is a fairly accurate representation of at least one type of Viking ship.

EVALUATE AND COMMUNICATE

9. Using **SOURCE 4** as a reference, **describe** your impression of the beginning of a voyage in a Viking longship. Be sure to mention what the Vikings brought on their journey, how the ship was powered and how it performed in the water.
10. **Evaluate** the importance of the innovations in the construction of the longboats in the Vikings being able to explore further afield from their homelands.

Answers and sample responses for this topic are available online.

LESSON 7.7 How did Viking craftwork protect the warriors in battle?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **describe** Viking craft in designing and making weaponry and armour, as well as its innovative effectiveness in battle
- **use** primary historical sources to add to your understanding of Viking craft

Tune in

Viking warriors were particularly terrifying to their enemies, but none more so than the berserkers, a small subgroup of Viking warriors.

According to the sagas and poems, these crazed warriors dressed only in animal skins and charged screaming into battle while biting the rim of their shields. They were known to be completely fearless, fighting while filled with a trance-like rage, foaming at the mouth and killing indiscriminately.

1. **What berserker features can you identify on the image of the chess piece?**
2. **Discuss whether you believe that the berserkers were real Viking warriors, or whether they were just made up for Viking sagas.**
3. **What might you need to find out more about to be able to answer Question 2 more accurately?**

SOURCE 1 An eight-foot copy of a twelfth-century chess piece based on a Viking berserker

7.7.1 Viking armour

The Vikings have often been considered fearsome warriors, especially by historical European sources. Some, like the **berserkers**, were known for their wild and fierce behaviour. However, calling them **'barbarians'** is misleading. Their weapons and ships were advanced for their time.

The Viking helmet started as a fancy mask made of **bronze** and iron but became simpler over time. The only real Viking helmet found by archaeologists is shown in **SOURCE 2**. Pictures from the Viking Age suggest they used iron helmets with a nose guard to deflect blows.

Viking shields were about a metre wide, round, and made of wood with a reinforced iron centre called a **boss**. By the end of the Viking Age, kite-shaped shields were more common. They protected the thighs, especially for mounted warriors. Viking body armour could be stiff leather, metal scales or **mail** (chain links). Mail was expensive and handmade. Longer mail coats, called hauberks, became more popular towards the end of the Viking Age.

SOURCE 2 An actual Viking helmet found in Gjermundbu, Norway

Vikings used many weapons: bows and arrows, spears, axes and swords. The bearded axe (**SOURCE 3**) was used mostly by Vikings. The sword, a status symbol, had a broad, double-edged blade, a cross-guard, and a **pommel** for close combat.

Viking swords were very ornate, sometimes gilded with precious metals. Vikings even gave names to their swords. For example, the fictional Beowulf's sword was called Hrunting. Another saga tells of King Magnus of Norway having a sword gilded with gold and with a grip made from walrus ivory, which he called Leg-biter. The Vikings certainly placed great importance on their swords and the rest of their war gear.

SOURCE 3 An artist's impression of a Viking raid

- **A** Contrary to popular belief, Viking helmets did not have horns attached. They would have been very impractical in battle!
- **B** Viking raiding parties struck quickly and unexpectedly, often at dawn, when it was hard for victims to escape or defend themselves.
- **C** The iron-headed battle axe was so sharp and heavy it could cut through armour.
- **D** Sometimes Vikings used the 'svinflyking', or V-shaped boar formation, when attacking. This ensured that their victims were quickly swamped by numbers.
- **E** Swords were a status symbol among Viking warriors. They were double-edged and often had a highly decorated hilt. Sometimes they were even given grisly nicknames such as 'Leg-biter'.
- **F** As a refuge, some monks built tall, round towers of stone. Rope ladders hung down from openings at the top. After climbing into the tower, monks pulled the ladders up. They stayed there until a Viking attack was over.
- **G** Usually only raid leaders wore expensive chain-mail tunics. Thick padded clothing was worn underneath.
- **H** The circular wooden shields were about one metre in diameter. They featured brightly painted designs. A metal boss covered the hole in the centre to which was attached an iron hand grip.
- **I** Spears comprised a slim iron blade connected to a long wooden shaft. Some Vikings were so skilled that they could catch spears in mid flight and toss them back.

SkillBuilder discussion

Using historical sources

1. Look at **SOURCE 3**. What kind of weapons are the Vikings using in this raid?
2. How are the Vikings positioned during their attack?
3. What type of defenses or shelters are visible in the background of the image?

SOURCE 4 An extract from *The Battle of Maldon*, a late tenth- or early eleventh-century poem written in Old English about a battle in which the Anglo-Saxons were defeated by the Vikings

Then was the fight near, glory in battle. The time had come when fey men must fall there. Clamor was raised there. Ravens circled, eagles, eager for carrion. There was uproar on earth. From hands then they released file-hard spears; ground spears [grim ones] flew. Bows were busy; shield took spear-point. Bitter that battle-rush! Warriors fell; on either hand young men lay.

7.7 SkillBuilder activity QUESTIONING AND RESEARCHING1

As historians, it is important that we ask the right questions about sources to understand what they can teach us.

1. **Propose** at least five questions you could ask about the artefacts in **SOURCE 5** that would help you decide how useful they are giving you information about the Viking Age. Example: Where were they found?
2. For each question, **create** a brief explanation about why it is important to ask it.
3. **Communicate** your questions and your explanations. Pretend you are speaking as part of a panel at a university history department evening, with the topic being Viking Archaeology.

SOURCE 5 Viking weapons from the tenth century CE

7.7 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 7	4, 5, 6, 8	9, 10

REMEMBER AND UNDERSTAND

1. Vikings were very fierce fighters. **State** why Vikings have been regarded as barbarians.
   A. The Vikings had minimal dress codes and manners.
   B. The Vikings have been stereotyped as savage raiders.
   C. The Vikings killed mainly for pleasure.
   D. The Vikings took no prisoners.
2. **Identify** whether the following is True or False.The most popular weapon among the Vikings was the battle axe. It was used the most because it could be used in a variety of situations.
3. **Select** the correct words from the options below to complete the following sentences.

mail	half a	bone	square	hide	round
iron	conical	one	bronze	linen	one and a half

   a. Evidence suggests that the Viking helmet was a _____ shape.
   b. Viking shields were about _____ metre(s) wide and were made of timber and _____.
   c. Viking armour was made of leather or _____.

4. **Explain** how berserkers might have added to the Vikings' barbarous image.
5. **Explain** why the conical helmet, as depicted in **SOURCE 2**, was useful to its wearer in battle.

ANALYSE AND APPLY

6. **Examine SOURCE 3**. **Describe** the sort of evidence that the artist who created it would have needed to accurately draw Viking warriors.
7. **Identify** what **SOURCE 3** tells us about the variety of Viking weaponry in battle.

EVALUATE AND COMMUNICATE

8. **Evaluate SOURCES 3** and **4**.
   a. **Explain** to what extent these two sources provide supporting evidence on what took place during Viking raids.
   b. **Explain** which source is the most useful for a historian studying Viking raids, and why.
9. Using evidence from **SOURCES 3** and **4**, **propose** why it was challenging to defend a community from a Viking attack.

Answers and sample responses for this topic are available online.

LESSON 7.8 Who did the Vikings attack and raid?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **explain** what happened in the Viking raids on Britain and Ireland
- **describe** why there are conflicting views of the Vikings from historical sources.

Tune in

In learning about the Viking attacks and raids, it is important that historians think about the sources of their information carefully. The Vikings did not have a detailed written language at this stage, so the information that we do have has usually come from other sources with their own biases.

The remote Scottish island of Iona had a flourishing monastic order begun by St Columba. Sometime in the ninth century, the Vikings discovered its wealth and started a series of attacks. The monks recorded these in their annals.

SOURCE 1 The *Annals of Ulster* list some of the attacks by Vikings on the monastery on the Scottish island of Iona.

802: Coluim Chille was burned by the heathens.

806: The community of Í, to the number of sixty-eight, was killed by the heathens.

825: The violent death of Blamac son of Flann at the hands of the heathens in Í Coluim Chille.

Coluim Chille = St Columba's **Í** = Iona

Discuss the following:

1. **Should the *Annals of Ulster* be considered a primary source or a secondary source, and why?**
2. **What is the monks' perspective (point of view) of the Vikings and how can you tell what that perspective is?**
3. **What conclusions can you draw about one aspect of the Viking Age from this source?**

7.8.1 Viking attacks in Britain and Ireland

The exact reasons why the Vikings began their movement out from their homelands is unknown. However, it seems certain to have been a combination of the pressures of growing populations, a lack of arable lands, fighting among the different groups and an awareness of the availability of the wealth of foreign lands. Combined with their skill in shipbuilding, this allowed for an expansion into other lands.

The early raids late in the eighth century were focused on the short trip from Scandinavia across the North Sea and were concentrated in Northern England, Scotland and Ireland.

7.8.2 Vikings raid the monasteries

The first recorded Viking attacks on Britain started in the coastal regions at the monasteries in the north of England and Scotland in the late eighth century and resumed by the mid ninth.

Notable raids included Lindisfarne in Northumbria in 793 CE and Iona off Scotland in 795. Vikings conducted hit-and-run raids, seizing valuable church goods, art, icons and slaves, leaving dead or injured monks behind. Their longships were ideal for these coastal attacks and swift escapes.

SkillBuilder discussion

Using historical sources

1. Read **SOURCE 3**. What group of people were likely to have created this source?
2. How would this impact the way they portrayed the information?
3. What techniques of warfare can you identify in the source?

SOURCE 2 Illustration of a Viking attack from the twelfth-century *Miscellany on the Life of St. Edmund*

SOURCE 3 A description of the Viking attack on Lindisfarne in *History of the Church of Durham* by the monk Simeon

On the seventh of the ides of June, they reached the church of Lindisfarne and there they miserably ravaged and pillaged everything; they trod the holy things under their polluted feet, they dug down the altars and plundered all the treasures of the church. Some of the brethren they slew, some they carried off with them in chains, the greater number they stripped naked, insulted and cast out of doors and some they drowned in the sea.

7.8 Skill activity USING HISTORICAL SOURCES

Individual accounts of Viking raids reveal much to historians about what the Vikings (the 'heathen men') did, but also about the values and attitudes of the writers themselves. When weighing up the reliability of a source, it is important to view the whole context.

SOURCE 4 An extract from the *Anglo-Saxon Chronicle*, which describes the first Viking raids on the monastic isle of Lindisfarne

Year 793.

Here were dreadful forewarnings come over the land of Northumbria, and woefully terrified the people: these were amazing sheets of lightning and whirlwinds, and fiery dragons were seen flying in the sky. A great famine soon followed these signs, and shortly after in the same year, on the sixth day before the ides of January, the woeful inroads of heathen men destroyed god's church in Lindisfarne island by fierce robbery and slaughter. And Sicga died on the eighth day before the calends of March.

1. **Analyse** the source to answer the following questions.
   a. **Explain** this writer's view of the Vikings.
   b. **Identify** some of the factors that may have influenced their point of view.
   c. **Explain** what is happening in this description.
   d. **State** whether you can trust it to be a reliable source of information. **Explain** why or why not.
2. As a class, **discuss** some of the other evidence we can use about the Vikings in this period to give a more balanced view.

7.8 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 6, 7, 9	5, 8, 10

REMEMBER AND UNDERSTAND

1. **Identify** why the early raids tended to be concentrated around the northern parts of England and Scotland.
   A. England and Scotland were traditional enemies of the Vikings.
   B. The Vikings liked the climates of England and Scotland.
   C. Viking maps only detailed these countries.
   D. It was a short trip to England and Scotland.
2. Select the correct options to complete the following sentence.

   Lindisfarne in Northumbria was attacked in **739** / **793** / **795** CE and Iona, off the coast of Scotland, in **739** / **793** / **795** CE.
3. **State** whether the following is True or False. On their raids Vikings took valuable church goods, such as works of art and valuable church icons, but not slaves.
4. **State** why you think the monasteries were such good targets.
5. Connect what you have learnt about Viking longships and weapons to **explain** why the Vikings were able to conduct lightning raids on these monasteries.

ANALYSE AND APPLY

6. Carefully read **SOURCE 3**.
   a. **Identify** four actions that the Vikings took during the attack.
   b. **Explain** the writer's view of the Viking attack and how you know what this view is.
7. **Explain** what **SOURCE 2** tells historians about the techniques of Viking sea attacks.

8. **Examine SOURCES 1** and **3**. **Infer** what the monks' perspective of the Vikings was.
9. Imagine that you are an Irish monk. Write a short letter to one of your colleagues in Europe, **describing** the attacks by the Viking invaders.
10. **Reflect** on what you have learnt about the Vikings. **Discuss** whether the Vikings should be remembered as raiders and pillagers, or whether you have other views. Use what you know about them from this lesson and further reading to write your answer.

Answers and sample responses for this topic are available online.

LESSON 7.9 Where did the Vikings begin to settle beyond their homelands?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the reasons for the Viking settlements in Ireland and England and explore the impact on the locals.

Tune in

The Vikings invaded and settled some of the countries around them, initially starting with those that were quite close and already had established populations, such as Ireland and England.

The picture in **SOURCE 1** shows a Viking festival in York, England. It is apparent that these people take much pride in their Viking heritage.

1. **Mind-map some ideas about what the Vikings might have added to English culture as they invaded and settled.**
2. **Why do you think modern English people recognise and celebrate those who invaded them?**

SOURCE 1 Locals enjoying dressing up for the Jorvik Viking Festival

7.9.1 Viking longphorts in Ireland

As the Vikings voyaged further from their homelands, they set up to winter away from home. Drawn to Ireland's monastic riches, Vikings founded Dublin as a ninth-century longphort that evolved into a thriving settlement with bustling trades. Excavations have revealed houses, streets, city walls, and a Viking burial ground in Kilmainham. These findings include the remains of men, women and children, along with artefacts that provide insight into Viking society.

SOURCE 2 An extract for the year 841 from the *Annals of Ulster*, a list of the year's events kept by monks and clergy

There was a naval camp at Linn Duachaill from which the peoples and churches of Tethba were plundered. There was a naval camp at Duiblinn from which the Laigin and the Uí Néill were plundered, both states and churches, as far as Sliab Bladma.

SkillBuilder discussion

Historical significance

1. Look closely at **SOURCE 3**. From what materials do these artefacts appear to have been made?
2. Can you suggest what they might be?
3. What conclusions might you draw about the Vikings in Dublin from these artefacts?

SOURCE 3 Artefacts from the excavation discoveries of Viking Dublin

Dublin's Viking Age peaked from the ninth to twelfth centuries, with shipbuilding as a major industry. Around 1070–1090 CE, five Viking ships were sunk at Skuldelev, Denmark, for a protective barrage. One of these, a 30-metre longship, was built in Dublin. The Vikings and their allies were ultimately defeated by Irish King Brian Boru at the Battle of Clontarf in 1014, ending their dominance in Ireland. However, their settlements and descendants remained.

7.9.2 Viking farming settlements in England

From the mid ninth century, Danish Vikings overran much of England. But in 878 CE, after several battles, Alfred the Great, the Saxon king of Wessex, forced the Danes to accept a treaty under which the Danish leader, Guthrum, agreed to withdraw to the eastern part of the country. This part of the land was known as the Danelaw. The centre of the Danish rule was the city of York, known to the Vikings as Jorvik. Alfred's son Edward later conquered the Danelaw. However, in 1016 Danish forces conquered England. Under the Danish King Canute, England formed part of a Scandinavian empire until 1042.

SOURCE 4 A silver coin from King Eric of Jorvik from the tenth century

7.9 SkillBuilder activity USING HISTORICAL SOURCES

This collection of silver jewellery and coins was found buried in a field in England by a metal detectorist in 2011. It dates from the ninth century CE and is of Viking origin.

TASK: Drawing conclusions from archaeological evidence

1. **Examine** the photograph of the collection.
2. **Describe** what conclusions you can draw about Viking artisanship from this time period. Be very specific in your descriptions.
3. **Infer** what it might suggest about the relationship between the Danish Vikings and Anglo-Saxons of the time. **Explain** carefully.
4. **Propose** any theories you have about who buried it.

SOURCE 5 A Viking treasure hoard found buried in a field in England

7.9 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4, 6, 9	7, 8, 10

REMEMBER AND UNDERSTAND

1. Why did the Vikings establish longphorts?
   - **A.** To use as bases in invaded lands
   - **B.** To use for holidays for their families
   - **C.** To use as storage facilities between raids
   - **D.** To house slaves while they were being trained
2. **State** whether the following is True or False. The Vikings settled in Ireland because it had wealthy monastic communities that they could raid and it was a particularly good spot to be based at for trade.
3. **State** what evidence there is that Dublin was a thriving community from the ninth to twelfth centuries.
4. **Explain** what the longship found in Denmark shows about the shipbuilding industry in Viking Dublin.
5. England was divided between the Saxons and the Danes (Vikings). The Danes took the eastern part of the country and this area was called _____.

ANALYSE AND APPLY

6. **State** what **SOURCE 3** suggests about the type of people who were likely to have been buried in Viking Dublin.
7. **Explain** how a Viking burial ground or cemetery can provide information for historians and archaeologists.
8. **Explain** what the discoveries of Viking settlements like Dublin tell us about the Vikings. Consider different ideas such as the expansion of their influence, their interactions with native peoples and the type of settlement they created.

EVALUATE AND COMMUNICATE

9. **Examine SOURCE 4**. Propose what the design of King Eric's coinage suggests about the type of image he was keen to promote.
10. **Recall** what you have learnt about the Vikings in this lesson. **Explain** the ways in which power was used in this period in England and Ireland, and what was its impact on society.

Answers and sample responses for this topic are available online.

LESSON 7.10 Where did the Vikings develop trade routes?

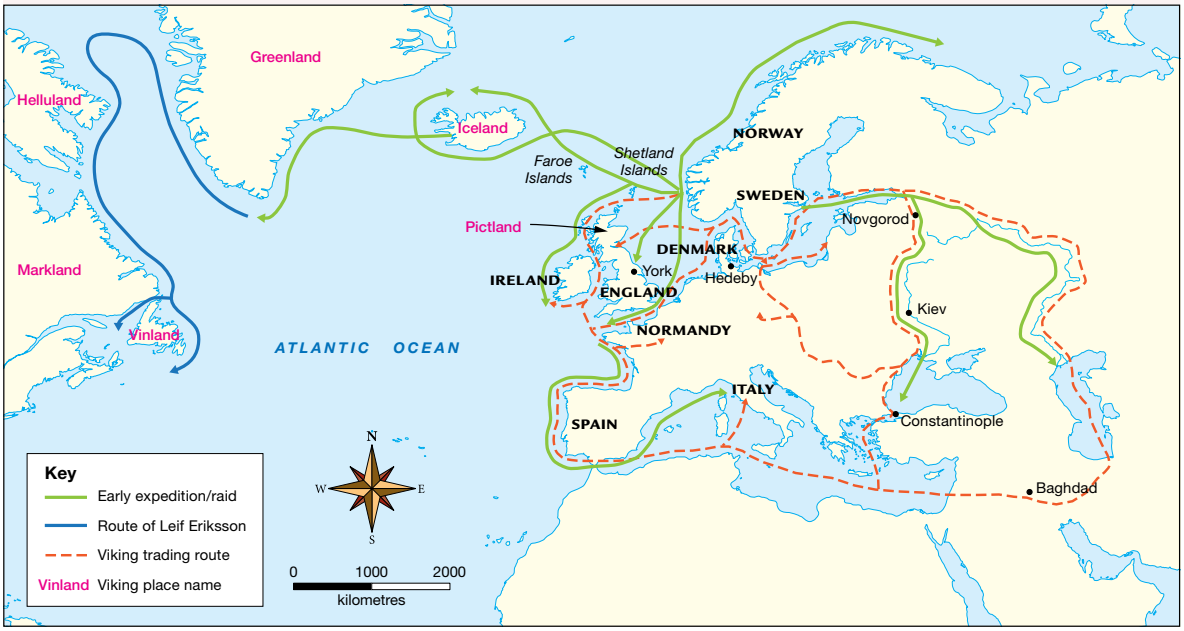
LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** the Viking trade routes through modern-day Russia and the east
- **analyse** the impact of trading on Viking and eastern European people.

Tune in

SOURCE 1 A map showing Viking trade and exploration routes until about 1000 CE



Source: Map drawn by Spatial Vision.

Maps are very useful to historians as they can show the different layers of expansion and exploration over the years.

Closely examine the map in **SOURCE 1**.

1. **Write two sentences on the early expeditions and raids from what you can see here on the map and your background knowledge.**
2. **Write two sentences on the Viking trading routes, once again using what you can see on the map plus your own knowledge.**
3. **Discuss your conclusions with the class.**

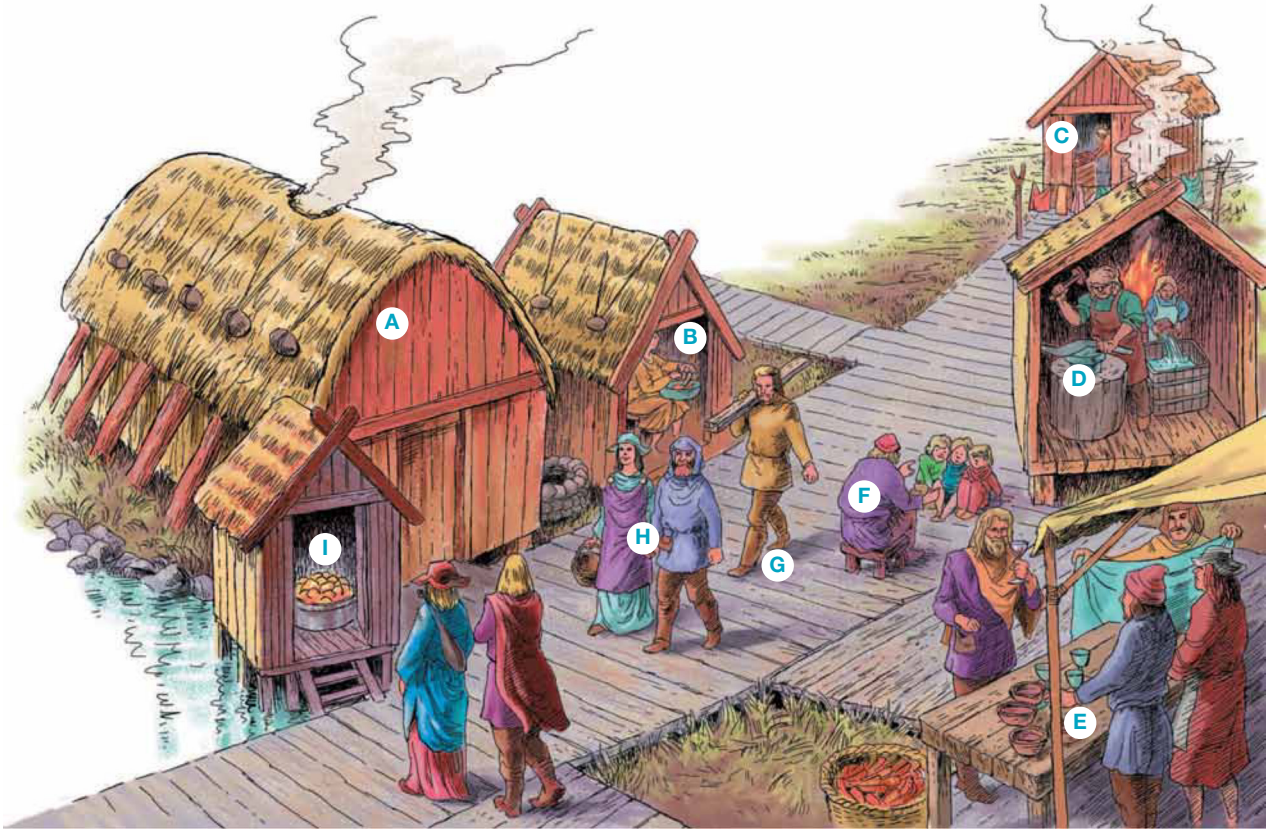
7.10.1 Trading settlements

With their ships and excellent navigation tools, the Vikings established crucial trading routes, particularly through eastern Europe. Known as the Rus, they sailed to trading towns and the Byzantine Empire, becoming prosperous and settling there.

Vikings were fierce raiders and skilled explorers, trading fur, timber, metal goods and slaves captured during raids. Viking trading towns, such as Hedeby in Denmark, served as trade crossroads. Traders from as far as Baghdad visited, exchanging goods like wine, bronze, iron and glassware.

Vikings also traded slaves, primarily Slavic people captured in raids, for Arabic silver and gold. This extensive trade influenced many European languages, where the word for 'slave' originates from 'Slav'.

SOURCE 2 A modern artist's reconstruction of a Danish trading centre



- **A** Longhouses had an earth floor and a thatch or turf roof. Animals and food stores were kept at one end in winter. Wealthy families may have had a table, storage chests, stools, oil lamps and wall tapestries.
- **B** Women spun wool from sheep and goats into cloth on wooden looms. Vegetable juices and minerals were used to dye the cloth.
- **C** Meat and fish were preserved by being smoked or pickled in salt. Bread, made from ground grain, was baked in clay ovens.
- **D** Iron weapons and tools were made and repaired in the blacksmith's barn. Sometimes steel (made by adding carbon to molten iron) was welded onto weapons such as axes to make them stronger.
- **E** At the markets, merchants might trade silks from China and glassware from Italy for farm produce or artefacts. Artefacts might include combs (made from deer antlers), skates and musical instruments (made from animal bones), cups (made from cow horns), silver jewellery and tapestries.
- **F** When not working, many Vikings passed the time wrestling, swimming, skiing, playing a board game called *hnefnatafl* (a bit like chess), and listening to the sagas told by storytellers.
- **G** The Vikings were experts at building both warships and trading vessels.
- **H** Men wore a woollen undershirt and leggings under a belted tunic or coat. Like women, they wore woollen or fur hats, woollen socks and soft leather shoes or boots. Women wore a long linen shift under a woollen tunic, clipped at the shoulders by two brooches.
- **I** To keep clean, Vikings visited the sauna every few days. They sat in a small, enclosed shelter and threw cold water on very hot stones. The steam opened the pores of the skin, helped by slaps from small birch or pine tree branches. Once hot and sweaty, people dived into a nearby source of ice-cold water.

Viking trading settlements were founded as far west as Ireland and as far east as modern-day Russia. Trading posts like Hedeby or Dublin were usually constructed entirely of timber with wooden planks lining the streets, outdoor marketplaces, and earthen ramparts and ditches surrounding the settlements to protect them from attack.

7.10.2 Trading boats

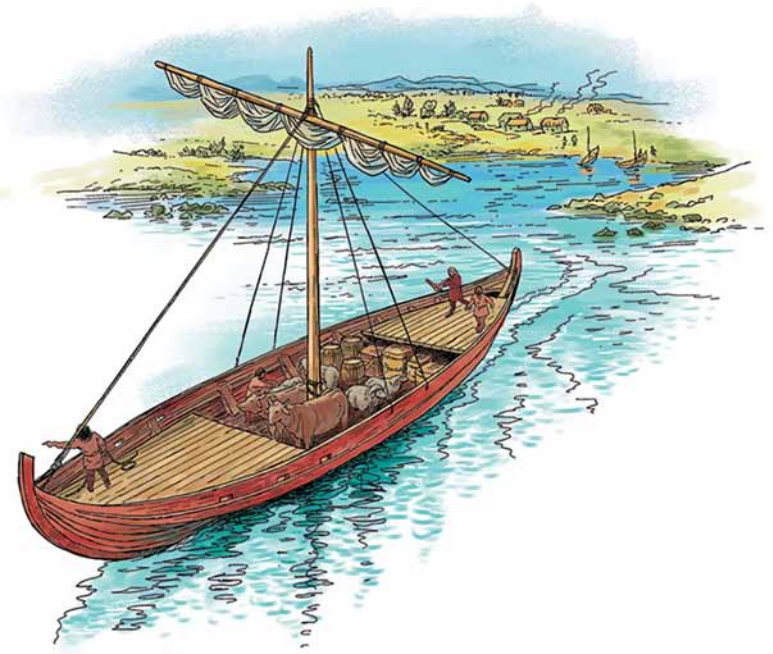
Viking longships were designed for war and long travel, but the Vikings also built another type of ship called **knarr**. These ships were designed for trade and each could hold around 30 cubic metres of goods. Historians know what they looked like because two knarrs have been found at the bottom of the sea. They were filled with rocks and sunk along with some longboats to block Roskildefjorde in Denmark. This was done to create an underwater barrier against enemy attacks.

SkillBuilder discussion

Historical significance

1. Study **SOURCE 3**. What features in the design of this knarr would protect crew and cargo when sailing through rough seas?
2. How does the width of a knarr compare with the longboat? How do you account for the difference?
3. How do you think the positioning of the single square sail would help merchants in their long sea journeys?

SOURCE 3 A modern artist's reconstruction of a knarr, based on a wreck found in Roskildefjorde, Denmark



7.10 SkillBuilder activity **COMMUNICATING, QUESTIONING AND RESEARCHING**

The knarr and the longship are very similar; in fact, the knarr was really just a more practical longship designed for longer journeys while carrying more objects, which is why it was used by traders and settlers.

Imagine that you are a boatbuilder and you have been asked to improve the design of the longship to make it better for traders and settlers.

1. **Recall** the list of features of the longship from lesson 7.6.
2. Brainstorm the following:
   - **Explain** what features you would keep to make it better for traders and settlers. Provide reasons why.
   - **List** what you would change or include to make it better for traders and settlers. Provide reasons why.
3. **Communicate** your findings to the Vikings who employed you (the class). Explore the similarities and differences between everyone's plans.
4. Combine the best ideas of the class and **present** your final design for the knarr.
5. When you have finished, **Investigate**, conducting research online, what the actual differences were between a longship and a knarr. **State** how close you were.

7.10 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 9	4, 5, 7, 11	6, 8, 10

REMEMBER AND UNDERSTAND

1. **Explain** why Hedeby's geographical position was good for trade.
   A. It was at the crossroads of East and North.
   B. It was at the crossroads of North and South.
   C. It was at the crossroads of East and West.
   D. It was at the crossroads of North and West.
2. **State** whether the following is True or False. The term 'slave' comes from 'Slavs', the Slavic people from western Europe who were taken as slaves by the Vikings.
3. **Identify** how Hedeby was defended.
   A. Walls were built around the trading post.
   B. A moat was built around the trading post.
   C. Towers were built around the trading post.
   D. Earthen ramparts and ditches were added to protect it from attack.
4. **Explain** the purpose of the knarr.
5. **State** why the Danes sunk ships in Roskilejorde.

ANALYSE AND APPLY

6. **Examine SOURCE 2**. **Explain** why there are very few remains of Viking settlements.
7. **Examine SOURCE 3**. **State** two advantages of transporting trade goods in this type of boat.
8. Archaeologists have found only the foundation timbers of towns like the one shown in **SOURCE 2**. **Determine** how they might have decided how the rest of the town might have looked, as shown in the illustration.
9. **State** three causes and/or effects of Viking trade and settlement.
10. The eastern Vikings developed a very distinct culture from those who went west, and they eventually became known as the Rus people. Reading back through section 7.10.1 and examining **SOURCE 2** again, choose a type of person (male or female, merchant or boatbuilder, etc.) and write a short paragraph about a morning in their life.
    Describe:
    - what they might have eaten
    - the type of work they were doing in the village
    - what they might have worn.

EVALUATE AND COMMUNICATE

11. **Evaluate** the importance of trade routes to Viking life and success.

Answers and sample responses for this topic are available online.

LESSON 7.11 What are some of the extraordinary achievements of the Vikings?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** the Viking settlements of Iceland and Greenland, and explain the extraordinary exploration of North America.

Tune in

While many Vikings were plundering and settling in established areas of Europe, there were also those who set off in search of uninhabited new lands to explore and perhaps settle for farming.

The Vikings explored, expanded, raided and settled many places in western and eastern Europe. They were a very hardy people. Curiosity as well as a desire for resources saw them also head west into the unexplored Atlantic Ocean.

1. **Look at a map of Scandinavia and the Atlantic Ocean.**
   - **What land is north-west of Norway?**
   - **What is west of that country?**
   - **What happens if you keep going further west, and a little south?**
2. **Map this route and discuss what it might be like to cross it in a longship.** ***Hint:*** **It would be around 2000 km.**

SOURCE 1 Rugged Scandinavian landscape

7.11.1 A Viking republic?

Around 874 CE, Iceland was colonised by Norwegian settlers, who fled to escape the Norwegian king's authority. By 930 CE, Iceland had established its own government with regional assemblies called **things**, each led by a local chieftain called *godar*. These *things* combined to form the **althing**, a national assembly rejecting monarchical rule, which is seen as one of Europe's earliest forms of democracy.

SOURCE 2 One of the earliest written versions of the Icelandic legal code. It dates from 1260, two centuries after the end of the Viking Age. Because the Vikings did not keep records in the form of a book, the code was originally recited by heart.

SkillBuilder discussion

Using historical sources

1. Look closely at **SOURCE 2**. The book from 1260 shows neat handwriting with illustrated capital letters. What does this suggest about the importance of the legal code to Icelanders of the thirteenth century?
2. This legal code was based on laws that had previously been memorised and recited by the 'Lawspeaker'. Should historians trust the accuracy of this text?
3. The image shows how the page has been illustrated and notes have been made in the margins. Why might Icelandic people do this?

7.11.2 Greenland

According to the sagas, in 982 CE, Erik the Red was exiled from Iceland for murder and explored a new land during his three-year banishment. He named the land 'Greenland' to attract settlers, and returned to Iceland to look for migrants, knowing the new community's survival depended on numbers. In 985 CE, he led a group back to Greenland, establishing western and eastern settlements. The Viking colony thrived for around 500 years until it was abandoned, likely due to climatic changes and possibly an epidemic.

SOURCE 3 An extract from the *Saga of Erik the Red*, an Icelandic saga from around the thirteenth century

Now, afterwards, during the summer, he proceeded to [go back to] Iceland, and came to Breidafjordr (Broadfirth). This winter he was with Ingolf, at Holmlatr (Island-litter). During the spring, Thorgest and he fought, and Eirik met with defeat. After that they were reconciled. In the summer Eirik went to live in the land which he had discovered, and which he called Greenland, 'Because,' said he, 'men will desire much the more to go there if the land has a good name.'

7.11.3 The discovery of Vinland

According to the *Saga of Erik the Red*, Erik's son Leif Eriksson was blown off course on his way from Norway to Greenland, which led to his discovery of Vinland, a land rich in resources. Leif and his crew explored, fished, whaled and repaired their ships before returning to Greenland.

Initially, these tales were seen as myths. However, in 1960, archaeologists Helge and Anne Stine Ingstad found Viking-era remains at L'Anse aux Meadows in Newfoundland, Canada. This discovery confirmed that Norse explorers reached North America long before Columbus.

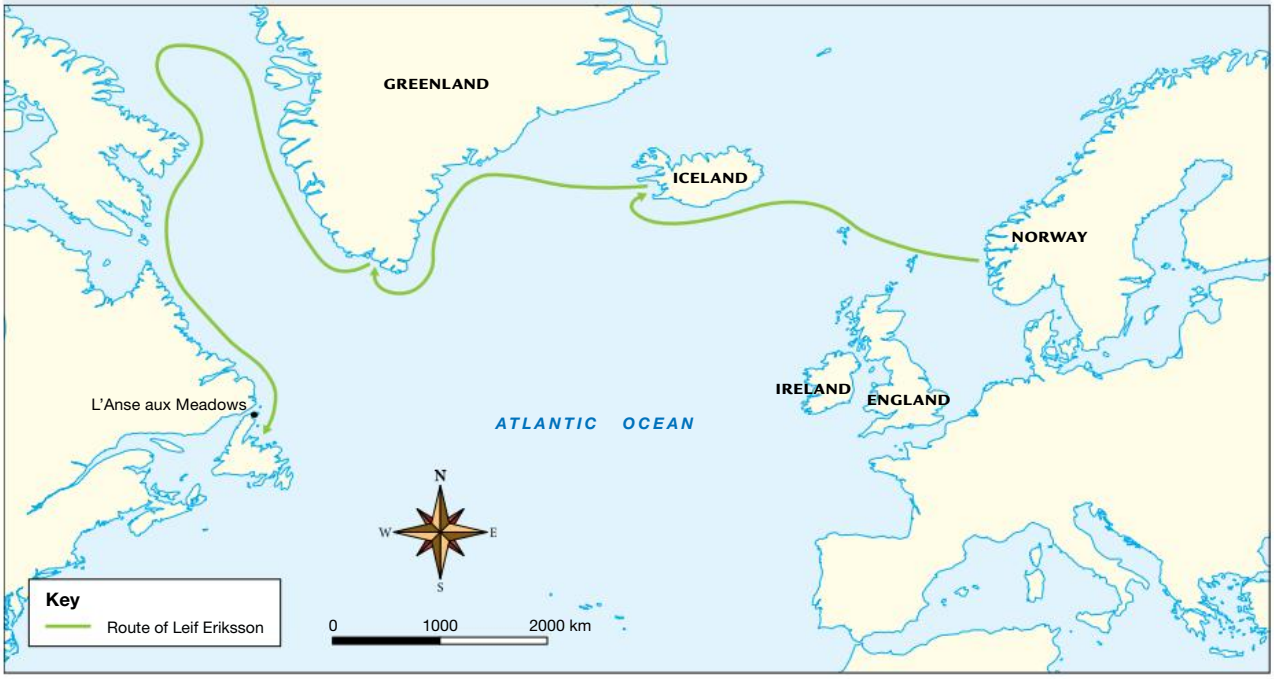
SkillBuilder discussion

Historical significance

1. What is the historical significance of Leif Eriksson (shown in the **SOURCE 4** statue)?
2. How does the statue of Leif Eriksson in Reykjavik connect to the *Saga of Erik the Red* and the *Saga of the Greenlanders*?
3. What features of the statue might reflect Leif Eriksson's contributions to Viking explorations, especially regarding the discovery of Vinland?

SOURCE 4 A statue of Leif Eriksson, Reykjavik, Iceland

SOURCE 5 A map of Leif Eriksson's journey to Vinland



Source: Map drawn by Spatial Vision.

The settlement appears to have been inhabited by a significant group of around 85–90 people. There were once seven buildings in three different groups, generally consisting of a longhouse, a hall-type building and smaller houses. There was also an iron-smelting furnace and charcoal pit, suggesting that the Vikings used it for making nails and repairing their ships, as well as making weapons and other items. If the sagas can be believed, the settlement lasted for only around three years before it was abandoned and Leif Eriksson and his explorers returned to Greenland.

7.11 SkillBuilder activity USING HISTORICAL SOURCES

The **SOURCE 6** and **SOURCE 7** extracts from two well-known Icelandic sagas are believed to have been written in the thirteenth century, centuries after the events that they recount. It is therefore assumed that they are based on a mixture of true events and storytelling. But they are quite different in significant sections of their accounts.

SOURCE 6 *Saga of Erik the Red*

After this there was much talk about making ready to go to the land which Leif had discovered. Thorstein, Eirik's son, was chief mover in this, a worthy man, wise and much liked. Eirik was also asked to go, and they believed that his luck and foresight would be of the highest use. He was [for a long time against it, but did not say nay], when his friends exhorted him to go. They made ready the ship which Thorbjorn had brought there, and there were twenty men who undertook to start in her. They had little property, but chiefly weapons and food. On the morning when Eirik left home he took a little box, which had in it gold and silver; he hid the money, and then went forth on his journey. He had proceeded, however, but a little way, when he fell from his horse, and broke his ribs and injured his shoulder, and cried out, 'Aiai!' At this accident he sent word to his wife that she should take away the money that he had hidden, declaring his misfortune to be a penalty paid on account of having hid the money. Afterwards they sailed away out of Eiriksfjordr with gladness, as their plan seemed to promise success.

SOURCE 7 *Saga of the Greenlanders*

There was now much talk about voyages of discovery. Leif, the son of Erik the Red, of Brattahlid, went to Bjarne Herjulfson, and bought the ship of him, and engaged men for it, so that there were thirty-five men in all. Leif asked his father Erik to be the leader on the voyage, but Erik excused himself, saying that he was now pretty well stricken in years, and could not now, as formerly, hold out all the hardships of the sea. Leif said that still he was the one of the family whom good fortune would soonest attend; and Erik gave in to Leif's request, and rode from home so soon as they were ready; and it was but a short way to the ship. The horse stumbled that Erik rode, and he fell off, and bruised his foot. Then said Erik, 'It is not ordained that I should discover more countries than that which we now inhabit, and we should make no further attempt in company.'

Complete the following to **compare** and **contrast** these accounts.

1. Carefully read both sources. You may want to make notes about each one as you go.
2. **Describe** what similarities they have.
3. **Describe** any differences they have.
4. **Propose** your own explanation for the differences.
5. **Evaluate** whether or not you believe that one might be more reliable than the other.

SOURCE 8 Statue of Erik the Red in the South Greenland region

7.11 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4	5, 6, 9	7, 8, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statements are True or False.
   a. The Althing was set up in Iceland in 930 CE. Its purpose was to be an early kind of parliament.
   b. Greenland was named by Erik the Red to make it seem more attractive to other Vikings.
   c. It is believed that even though the Vikings lived successfully for 500 years in Greenland, they were most likely driven out of the area due to the unfertile land.
2. **Identify** what country most Icelanders originated from and why they left their original home.
   A. They were from Europe, which they left because they were feuding with the king.
   B. They were from Sweden, which they left because they were feuding with the king.
   C. They were from Denmark, which they left because they were feuding with the king.
   D. They were from Norway, which they left because they were feuding with the king.
3. **Define** what it means to be exiled, with reference to Erik the Red.
4. **Recall** why the new land explored by Leif Eriksson was called 'Vinland'.
5. **Explain** why there was an iron-smelting furnace and charcoal pit found in the excavation in L'Anse aux Meadows in Canada.

ANALYSE AND APPLY

6. **Examine SOURCE 2**. Why was the written Icelandic legal code dated 1260 CE when the Althing actually began in 930 CE? What did they do before this?
7. **Explain** what made the Icelandic Althing a unique form of government for its time.
8. **SOURCE 4** and **SOURCE 8** are modern statues commemorating Leif Eriksson and Erik the Red. **Analyse** their stance and posture, **explaining** what the sculptors might have been trying to convey.

EVALUATE AND COMMUNICATE

9. The archaeological findings unearthed at L'Anse aux Meadows in Canada included the remains of seven buildings in three different groups, consisting of a longhouse, a hall-type building and smaller houses. There was also an iron-smelting furnace and charcoal pit, as well as other artefacts and weapons. **Discuss** the type of settlement that this was and suggest the original purpose of these artefacts.
10. Imagine that you are a journalist in 1960 and you are covering the discovery in L'Anse aux Meadows in Canada. **Write** a brief article that you would include on the front page of the newspaper that day, highlighting the historical significance of the find. Ensure you include a suitable headline.

Answers and sample responses for this topic are available online.

LESSON 7.12 What are some factors that led to the decline and end of the Viking Age?

LEARNING INTENTION

By the end of this lesson you should be able to **describe and explain** the factors that led to the end of the Viking Age.

Tune in

The chalkstone church in **SOURCE 1** is almost a thousand years old and there is evidence of three other wooden churches having been in the same place dating back to Danish King Harald Bluetooth.

1. **Brainstorm three questions that this source raises about Viking religion and beliefs around the tenth century CE.**
2. **Share these questions as a class and see if you can come up with any hypotheses to answer them.**

SOURCE 1 The Christian Church at Jelling, Denmark, is recognised as having had over 1000 years of continuous use.

Historians agree that the Viking Age ended around the eleventh century due to several factors. It's important to note that while the period of raids and expansion ceased, the Norse people remained in Scandinavia, where they have lived continuously for thousands of years.

7.12.1 The spread of Christianity

The Vikings gradually became more exposed to Christianity. Initially, they accepted the Christian god among their own, but eventually most Viking leaders converted exclusively to Christianity. This conversion was gradual, with a period during which Christian and pagan practices coexisted. For missionaries, this approach allowed Christianity to gain a foothold without completely overthrowing the old gods. Sentimental attachment to pagan traditions may have also played a role, as evidenced by the later Christian sagas that recount pagan myths and legends.

7.12.2 Christian leadership

Kings and chieftains adopting Christianity accelerated conversion. With many European leaders already Christian, Scandinavian rulers found it politically advantageous to convert. King Olaf Tryggvason imposed Christianity on Norway in 995 CE, reportedly destroying pagan temples, which means he probably faced resistance. Remote regions like northern Norway, Iceland and Greenland had little exposure to Christianity. By the end of St Olaf's efforts, Christianity was firmly established in the Viking world.

SkillBuilder discussion

Using historical sources

1. St Olaf converted Norway by forcing Christianity on his people. Why would he be remembered positively?
2. What aspects of the artefact on this image support his violent approach to conversion?
3. What material do you think that this source might be made from? ***Hint:*** It is banned in Australia.

SOURCE 2 St Olaf with his axe, depicted on a fifteenth-century bishop's crozier from Norway

7.12.3 Peace settlement in France

Vikings had raided the land of the Franks regularly over the centuries. In the ninth and tenth centuries, a group of Vikings, led by the warlord Rollo, once again carried out an attack. The King of the Franks, Charles III, came up with a solution to stop this and any future attacks from other Vikings. In 911 they signed the Treaty of Saint-Clair-sur-Epte, which gave an entire Frankish region including the city of Rouen to the Vikings. In return, Rollo and his descendants agreed to protect them from any further Viking attacks. Rollo integrated into French society and became the Duke of Normandy. The age of Viking attacks in France was over.

7.12.4 The last Viking attack on England

When King Edward the Confessor of England died in 1066, he had no direct heir. Several people wanted the throne:

- Harold Godwinson, a powerful earl
- King Harald Hardrada of Norway, who claimed the throne as a descendant of King Canute
- Duke William of Normandy, who said Harold had promised to support him.

Harald Hardrada and his Norwegian army landed in northern England. They fought Harold Godwinson's army at Stamford Bridge and were defeated. Hardrada and Tostig, Harold's brother who had joined Hardrada, were killed.

William of Normandy then sailed to England. Harold's tired troops marched 700 kilometres south to meet William's forces. In the Battle of Hastings, Harold was killed, and the Normans won. William was crowned King of England on Christmas Day, 1066, and became known as William the Conqueror. A Norman duke with Viking ancestry had become the King of England in what is known as the Norman Conquest.

SOURCE 3 Contenders for the English throne jostle for power

A **Harold Godwinson** 'I should be king! Edward was my brother-in-law, and even though I rebelled against him in 1051, we've put aside our differences.'

B **William, Duke of Normandy** 'Edward promised me the throne because I helped him crush Harold's rebellion in 1051. Harold even swore to me that he'd let me be king!'

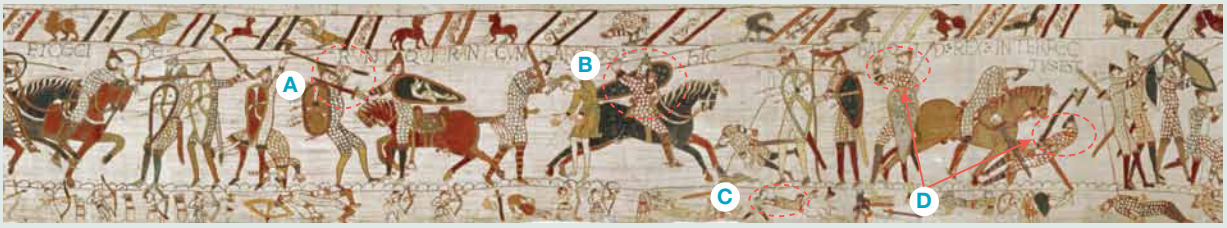
C **Harald Hardrada** 'We should not let Viking influence in England disappear. I'm a descendant of King Canute and that's why I should be king!'

D **Tostig Godwinson** 'My brother Harold is a power-hungry, ambitious swine! I want the throne for myself, and I'll use King Harald Hardrada of Norway to my advantage to get it!'

7.12 SkillBuilder activity USING HISTORICAL SOURCES

The Bayeux Tapestry is a long and detailed tapestry showing scenes celebrating William the Conqueror's victory in the Battle of Hastings and success in winning the English throne. It is believed to have been produced in France in the eleventh century by William's half-brother, Bishop Odo, to decorate his newly built cathedral.

SOURCE 4 A scene from the Bayeux Tapestry — Harold's death



A An English *huscari* — the elite bodyguard of Harold's army

B A mounted Norman knight. His armour is similar to that of the *huscari*. His kite-shield is favoured over Viking round shields.

C Stripping troops of their expensive armour

D Harold is killed. He is either shot with an arrow or cut down by Norman sword — or perhaps both.

TASK: The tapestry is recognised as a primary source of the Conquest of England and it gives us details that historians would otherwise not have known. But exactly how trustworthy a source is it?

1. **Investigate**, conducting research, to find more information on the Bayeux Tapestry. You might like to use the **Bayeux Tapestry** weblink in the Resources panel.
2. Make notes about:
   - theories about its accuracy
   - information about who created it
   - information about why it was created
   - any debates that contest its accuracy.
3. **Summarise** your findings, supporting your ideas with evidence from the information you found.

7.12 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 6	4, 5, 7	8, 9, 10

REMEMBER AND UNDERSTAND

1. **Select** the correct options to complete the following sentences.

   The Battle of **Normandy in 1066** / **Hastings in 1066** / **Hastings in 1606** is the famous event in medieval history shown on the Bayeux Tapestry. It shows the perspective of the **Vikings** / **Normans** / **Saxons**.
2. **Identify** Duke William of Normandy's connection to the Vikings.
   A. He was the great-great-great grandson of the Danish Viking Rollo, Duke of Normandy.
   B. He was the great-great-great grandfather of the Danish Viking Rollo, Duke of Normandy.
   C. He was the great-great-great grandson of Leif Eriksson.
   D. He had no connection to the Vikings.
3. Complete the following sentences.
   a. Changing from one religion to another is called _____.
   b. King _____ imposed Christianity in Norway.
   c. The _____ parts of Scandinavia were probably most resistant to the new Christian religion.
   d. King Olaf Tryggvason's successor was _____.
4. **Explain** Charles III's method of defending his Frankish kingdom from further Viking attacks.
5. **Explain** why there was more resistance to the conversion to Christianity in some places than others.

ANALYSE AND APPLY

6. Look closely at **SOURCE 2**. **Identify** what historians can learn from sources like this.
7. Study **SOURCE 4**. **Compare** and **contrast** what you know about the Viking style of battle with what you can see in this scene? Is there any evidence of William's Viking heritage?
8. The chalkstone church in **SOURCE 1** is almost a thousand years old and there is evidence of three other wooden churches having been in the same place dating back to Harald Bluetooth. **Create** a short speech, defending its inclusion on the UNESCO World Heritage List.

EVALUATE AND COMMUNICATE

9. After reading the annotations in **SOURCE 3**, **evaluate** who had the strongest claim to the English throne. **Justify** your answer.
10. **Summarise** how events such as the Norman Conquest contributed to ending the Viking Age and Viking raids in particular.

Answers and sample responses for this topic are available online.

LESSON 7.13 Inquiry: How trustworthy are the sagas?

LEARNING INTENTION

By the end of this lesson you should be able to **discuss** the accuracy and usefulness of primary sources as well as the difficulty in distinguishing between fact and opinion.

In this inquiry, you will compare sections of two Icelandic sagas, the *Saga of Erik the Red* and the *Saga of the Greenlanders*.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching

Write your inquiry questions. This is what you would like to learn; for example:

a. Who told the sagas and when did they tell them?
b. Who wrote the sagas down and when was this likely to have happened?

Research the answers to your question(s).

- To develop some background into the sagas including who told them and who wrote them down and why, you can use the various sources of information in this topic.
- You may wish to complete some further research from websites of your choice (e.g. the **Icelandic Saga Database**).

Step 2: Using historical sources

Analyse your information on each saga to explore the differences in key points.

Step 3: Historical perspectives and interpretations

Evaluate by comparing the two sections that you chose, annotating the text with different colours to show differences and similarities. What do the differences suggest about the saga writers and their values and beliefs?

Step 4: Communicating

What is the answer to your research question(s)? **Present** your findings in a format of your choosing. Support your answer with examples from your research, analysis and evaluation.

LESSON 7.14 Review

7.14.1 Key knowledge summary

Use this dotpoint summary to review the content covered in this topic.

7.2 How do we know about the Vikings?

- The Viking civilisation that we study existed over one thousand years ago.
- Although a written language called runes existed, these were mainly for stone or bone inscriptions. It was not until the Vikings became Christian later in the Viking Age that written language was used to record things.
- Historians discover information from this period through the examination of artefacts and other archaeological discoveries.
- There have been significant discoveries of burial sites such as the King's Mound in Gokstad in Norway and many archaeological sites where there were settlements.
- The Vikings had a great oral storytelling culture.
- Late in the Viking Age, the stories of heroes and gods were written down and are known as the sagas. There was also much written about the Vikings by monks and others like the Anglo-Saxons who were their enemies, such as the Old English story, *Beowulf*.

7.3 How did the geography and climate of Scandinavia influence the Viking way of life?

- Much of the land in the Viking areas was rocky and mountainous and only a small percentage was suitable for farming. Because of this, the Vikings lived mainly around the coastal areas of their lands, where the climate was milder and land more fertile.
- Although the winters were very cold, the water around the Viking homelands was prevented from freezing by warm currents, like the Gulf Stream. This was important for a seafaring people.
- From around the eighth century, the Vikings started to raid and later settle other areas.
- There are a number of theories about why the Vikings started to move away from home. For example, it is possible that they needed more farming land because the population was growing. Another theory is that the Vikings fought among themselves and some fled overseas. There is also the hypothesis that they took advantage of weaknesses among the rulers of European countries to conquer and settle. It is likely to be a combination of a number of these theories.

7.4 Who were the Vikings and how did they live?

- Although Vikings are known as pirates and raiders, for the most part they were farmers. Viking society was stratified; there were kings or lords known as jarls, freemen called karls and slaves known as thralls. The slaves were usually people who had been brought back after raids and battles. They were needed for labour on the farms.
- Viking farms were a series of buildings huddled around a longhouse and were often quite isolated, meaning the people relied only on themselves and the farms were often self-sufficient.
- Vikings kept livestock and crops of grains, such as barley and rye, as well as flax and hemp for linen sailcloths.
- Viking women ran the farms as the men tended to be away for long periods on raids.
- Children would most likely have helped out on the farm.

7.5 What was the early Viking religion and how did it change?

- Early Vikings followed a pagan religion.
- Viking myths are full of giants and of their gods who lived in a place called Asgard, which is high up in the sky.
- They worshipped many gods, the most significant of whom were Odin, Freya and Thor.
- Odin features in many of the sagas as the god who ruled from Valhöll, the Hall of the Slain, where the warriors who died in battle were welcomed by the Valkyries, or war-maidens.

- Vikings believed that death marked the beginning of a journey to another world and their burial practices reflected this. The dead were buried with the things the Vikings believed they would need in the next life or had enjoyed in this one, with archaeological finds of burial mounds providing evidence of this.
- Over time the Vikings became more and more exposed to Christianity through their travels and trade with other countries, as well as from contact with missionaries.
- Eventually, most Viking leaders adopted Christianity as their sole religion and imposed it on their subjects.

7.6 What was the impact of the developments in longboat technology?

- In the eighth century CE, developments in Viking boat design technology, such as innovations in the keel, the rudder and the sail, enabled them to make longer ocean voyages.
- The remains of several ships have been found and replicas have been built that demonstrate how quickly the ships were able to sail across the seas, which is also quite remarkable considering that they only had the sun and stars for navigation.
- Viking ships were large but quite narrow and shallow, which enabled them to be pulled up close to shore during raids.
- There is evidence that the ships were carried overland from one waterway to another.
- At times Viking ships were known as dragon ships because a carved head of the mythical monster was sometimes mounted on the prow of the ship.

7.7 How did Viking craftwork protect the warriors in battle?

- Viking weapons and armour were extremely well-constructed and effective.
- For protection, the Vikings wore body armour usually made of leather and chain mail, as well as a conical iron helmet.
- They carried timber shields to protect their bodies.
- They used an array of weapons such as bows and arrows, spears, axes and swords.

7.8 Who did the Vikings attack and raid?

- Around the eighth century CE, the Vikings began their expansion into other lands.
- Monastery records from England, Scotland and Ireland show that the Viking raids started as hit-and-run raids; they attacked and took with them the monastery's precious artefacts and money, killing and maiming monks and others as they attacked.

7.9 Where did the Vikings begin to settle beyond their homelands?

- As time went on and the Vikings travelled further from their homelands, they set up winter camps in some of these places because it was too far to get home for the winter. Eventually some of these became permanent settlements, such as Dublin in Ireland.
- The Vikings settled much of England, dividing the country between them and the Anglo-Saxons. The northern part of the country, known as the Danelaw, was ruled by the Vikings until it was conquered by Edward, the son of Alfred the Great.

7.10 Where did the Vikings develop trade routes?

- As well as longships, Vikings had trading ships called knarrs.
- The Vikings also founded trading posts and settlements, including one called Hedeby that was on the crossroads of the East and West and settlements in modern-day Russia and Ireland. Many goods were exchanged including slaves, wine, bronze, iron and glassware.

7.11 What are some of the extraordinary achievements of the Vikings?

- In their search for new lands, the Vikings colonised Iceland and Greenland. Erik the Red is remembered as the Viking who settled Greenland.
- His son, the explorer Leif Eriksson, made it as far as North America in about 1000 CE. He established a settlement there, which he called Vinland.

7.12 What are some factors that led to the decline and end of the Viking Age?

- The French King Charles III ended the Viking raids in France through a diplomatic deal with the Viking Rollo, making him Duke of Normandy in exchange for protection from other Vikings.
- The Battle of Hastings ended the Viking Age in England.
- When England's Edward the Confessor died in 1066, he left no direct heir to the throne.
- Three main contenders came forward to replace Edward the Confessor: a powerful earl, Harold Godwinson; the Norwegian king Harald Hardrada, a descendent of the Danish king Canute who once ruled England; and William of Normandy, who said that he had been promised the throne after Edward's death.
- Godwinson and Hardrada fought, with the Viking king eventually being killed. After this, Harold Godwinson was defeated by William and the Normans, who had sailed from France.

7.13 Inquiry: How trustworthy are the sagas?

- Determining the accuracy and usefulness of primary sources relies on distinguishing between fact and opinion.
- The sagas were written by people with different views, beliefs and biases.

7.14.2 Key terms

althing Iceland's parliament; Icelandic governing national assembly formed during the Viking Age, which met once a year
arable land that can be ploughed for crops
barbarian uncultured and uncivilised; not Christian
berserker Viking warrior who fought naked or near-naked and rushed wildly into battle. The word 'berserk' is derived from this.
boss metal bulge used as reinforcement in the centre of a shield
bronze metal alloy, mainly of copper and tin
fjord long, narrow inlet flanked by high cliffs and slopes
flax plant cultivated for its seeds and fibres, which can be used to produce many things such as textiles
Gulf Stream great warm current of water flowing from the Caribbean Sea all the way to northern Europe
heathen one who is not of one's own religion, and is therefore seen as being uncivilised
hemp plant favoured for its tough fibre, useful in the making of rope
keel lowest timber running along the length of a vessel, and upon which the framework of the whole boat is built
knarr a Viking trading ship
linen cloth made from flax
literate able to read and write
longhouse a Viking farmhouse with a curved shape like an upturned boat. Particularly large longhouses meant for 30–50 people are often called halls.
longphort a fortified base
mail armour comprising chain links
oath breaker someone who goes back on their word
pagan someone who is neither Christian, Jewish or Muslim; one who worships many gods, or none
polytheistic the belief in or worship of more than one god
pommel rounded knob at the end of a sword hilt
reconstruction rebuilding or re-making: in archaeology, rebuilding an artefact using archaeological remains as a guide
republic a state in which the head of the government is not a ruler who inherits their position, as might a king, queen or emperor
rudder broad wooden or metal piece at the end of a boat used for steering; on a longship, it was a broad oar attached to the tiller
runes letters of the Scandinavian alphabet based on Roman or Greek letters but modified to be easily carved on wood or stone
saga a medieval Scandinavian tale about exploits and adventures in the life of a hero or his family
self-sufficient able to provide for its own needs
tapestry carpet-like wall-hanging
thing regional meeting held to decide local issues in Norway and Iceland during the Viking Age

7.14.3 Reflection

Revisit the inquiry question posed in the Overview:

What was the way of life of the Vikings, how was their society structured and how did it change?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

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Post-test	Online post-test
eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary
Video eLesson	The Vikings (c. 790–1066)

7.14 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 4, 7, 8, 11	1, 5, 9, 12, 13	3, 6, 10, 14, 15

REMEMBER AND UNDERSTAND

1. Which one of the following was *not* a reason that the Vikings may have started their raids?
   - **A.** They took advantage of the bickering among some European countries to raid them and seize their lands.
   - **B.** They wanted to spread Christianity.
   - **C.** They had a growing population and needed more farming land.
   - **D.** They had been fighting among themselves and some had to flee overseas as a result.
2. Which three countries were the Viking homelands?
   - **A.** England, Ireland and France
   - **B.** Denmark, Norway and Sweden
   - **C.** Denmark, Norway and Russia
   - **D.** Norway, Sweden and England
3. Consider the following statements about Viking longships:
   - **i.** The Vikings carried them from one waterway to another.
   - **ii.** They all had dragon carvings on the prow.
   - **A.** Both statements are True.
   - **B.** Both statements are False.
   - **C.** Statement
     - **i.** is true and statement
     - **ii.** is False.
   - **D.** Statement
     - **i.** is false and statement
     - **ii.** is True.
4. What is a berserker?
   - **A.** A Viking dance
   - **B.** A Norse god
   - **C.** A type of battle axe
   - **D.** A ferocious warrior

5. Which of the following is *not* a Norse pagan god or goddess?
   A. Odin
   B. Thor
   C. Freya
   D. Shiva
6. Identify the correct Viking social hierarchy from highest to lowest in order.
   A. Jarl, karl, thrall
   B. Karl, jarl, thrall
   C. Thrall, karl, jarl
   D. Thrall, jarl, karl
7. Which of the following statements about the Vikings is True?
   A. Vikings mainly lived in isolated farms rather than villages.
   B. The Vikings raided in winter.
   C. Viking women were treated like slaves.
   D. It was too cold for Viking farmers to grow crops.
8. What are runes?
   A. Large mounds of sand
   B. Early Viking writing
   C. An Icelandic tribe
   D. Pictures carved on the Jelling stones
9. The Battle of Hastings was won by:
   A. Harold Godwinson.
   B. Harald Hardrada.
   C. William of Normandy.
   D. Tostig Godwinson.
10. For what reason is it suspected that the Vikings eventually abandoned their settlements in Greenland?
   A. War
   B. Climate change and an epidemic
   C. Distaste for cold weather
   D. Lack of food sources

ANALYSE AND APPLY

11. Study **SOURCE 1**.
   a. **Describe** the features of a Viking ship you can see in **SOURCE 1**.
   b. **State** whether this image is historically accurate. **Explain** why or why not.

SOURCE 1 A scene from the Bayeux Tapestry, showing Norman ships invading England in 1066. Although built in Normandy, the boats are clearly Viking longships.

12. **Describe** the ways in which Viking mythology reflects Viking society. **Explain** how their beliefs connected with their way of life. Use specific examples of gods, goddesses and myths.
13. **Consider** reasons the Vikings became Christians.
14. **Describe** reasons for the early Viking raids on monasteries.

EVALUATE AND COMMUNICATE

15. The Viking Age, as we study it, was from c. 790–1066 CE. In an extended paragraph, **discuss** why such a brief period of history has had such a large impact on our imaginations. Use examples of how the Vikings have been shown in popular culture over the last 50 years.

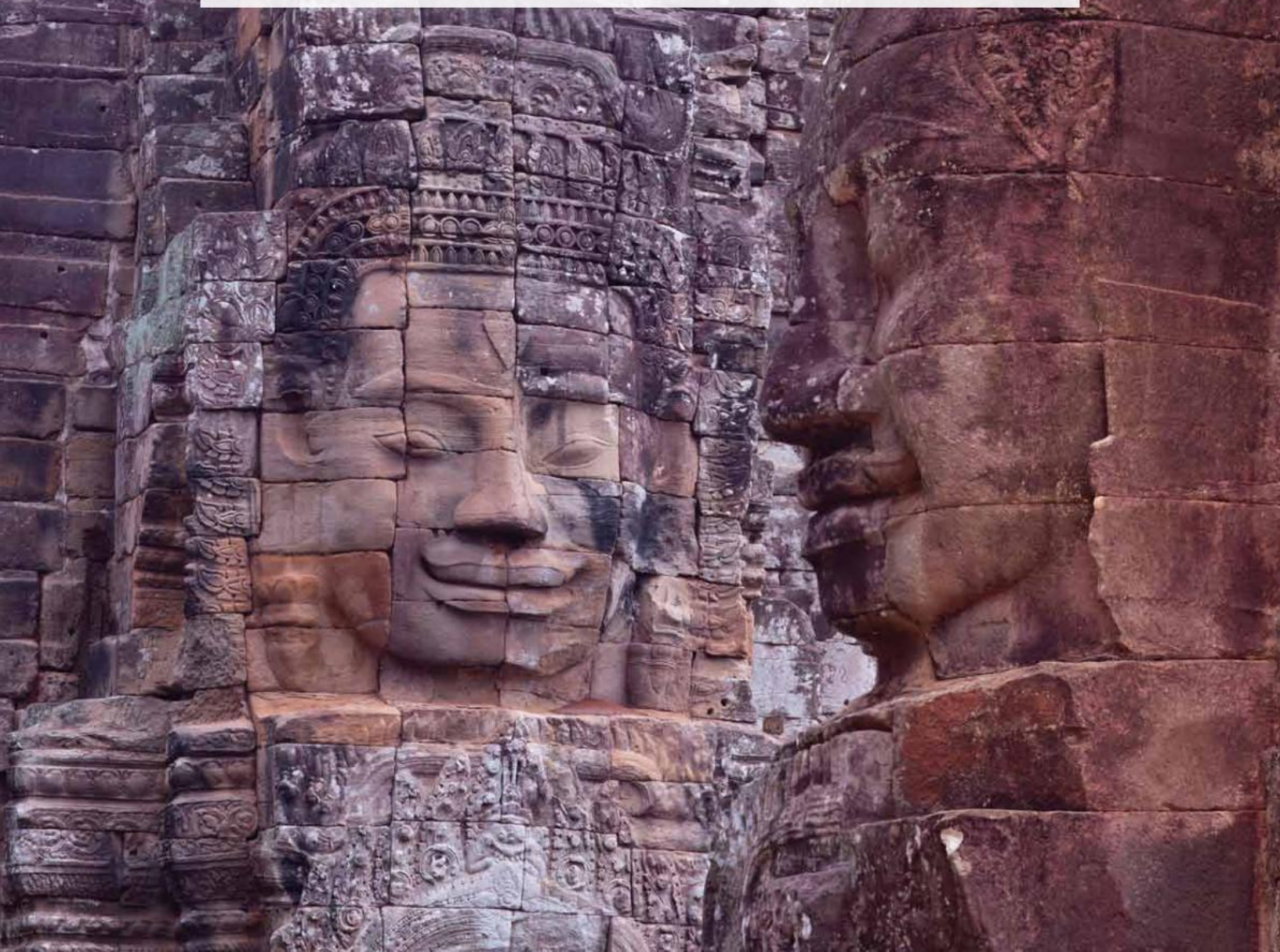
Answers and sample responses for this topic are available online.

8 Angkor and the Khmer Empire

LESSON SEQUENCE

online only

8.1 Overview
8.2 How do we know about Angkor and the Khmer Empire?
8.3 How much did geography influence Khmer civilisation?
8.4 What was the historical setting?
8.5 How did the Khmer create an empire?
8.6 How did religions influence the Khmer Empire?
8.7 What was life like in the Khmer Empire?
8.8 Why are Angkor's buildings famous?
8.9 Why did Angkor and the Khmer Empire decline?
8.10 What are the legacies of the Khmer Empire?
8.11 Inquiry: Contested histories
8.12 Review



LESSON 8.1 Overview

INQUIRY QUESTION

What was life like in the Khmer Empire, what were the key beliefs, significant social values and perspectives and what contributed to change?

Australia has close ties with several countries in South-East Asia, with some being popular destinations for Australian travellers. To understand any country or region, you need to know its history. In this topic you will learn that Cambodia was once the centre of a great empire that controlled most of mainland South-East Asia, an empire that built amazing temple complexes, still visited by millions of people today.

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Pre-Test
Online Pre-test

eWorkbook
Customisable worksheets for this topic (ewbk-14244)

Digital documents
Key terms glossary (doc-43122)

Video eLesson
Angkor and the Khmer Empire (eles-1827)

794
Emperor's court moves from Nara to Heian-kyo (modern-day Kyoto)

798
Kyomizu-dera (Pure Water Temple) constructed

1180–1185
Genpei War

1252
Great Buddha statue installed at Kamakura

1274 and 1281
Unsuccessful attempts by Mongol armies to invade Japan

700 | 800 | 900 | 1000 | 1100 | 1200 | 1300

CE

Heian period 794–1185
Noble Fujiwara family at the height of its political power.
Flowering of art and literature, especially poetry
Use of phonetic kana scripts.
Rise of samurai military class.
The Pillow Book is written by Sei Shonagon.
The Tale of Genji is written by Murasaki Shikibu.

Kamakura period 1185–1333
Minamoto no Yoritomo becomes shōgun and puts Japan under military control.

SkillBuilder

Use the SkillBuilder activities to develop these Historical concepts and skills:

- HISTORICAL QUESTIONS
- CHRONOLOGY
- USING HISTORICAL SOURCES
- CONTINUITY AND CHANGE
- CAUSES AND CONSEQUENCES
- HISTORICAL SIGNIFICANCE
- COMMUNICATING

1397
Kinkaku-ji (Golden Pavilion) built.

1467–77
Onin War

1549
Francis Xavier introduces Christianity to Japan.

Azuchi-Momoyama period 1568–1600
Toyotomi Hideyoshi persecutes Christians. Increase in foreign trade.

1600
Battle of Sekigahara

1688–1704
Genroku period brings a flourishing of urban culture

1853
Commodore Perry first visits from the US.

1868
The Tokugawa shōgunate is overthrown. Emperor Meiji is restored to power.

1868–69
Boshin War

1400 | 1500 | 1600 | 1700 | 1800 | 1800 | 2000 CE

Muromachi period 1336–1573
Japan under military control of the Ashikaga shōguns

1467–1568
Age of the warring states

Edo period 1600–1868
Japan under military control of the Tokugawa shoguns Christians persecuted *Shi-nō-kō-shō* organisation of society Policy of national seclusion isolates Japan from the rest of the world Edo is the largest city in the world.

LESSON 8.2 How do we know about Angkor and the Khmer Empire?

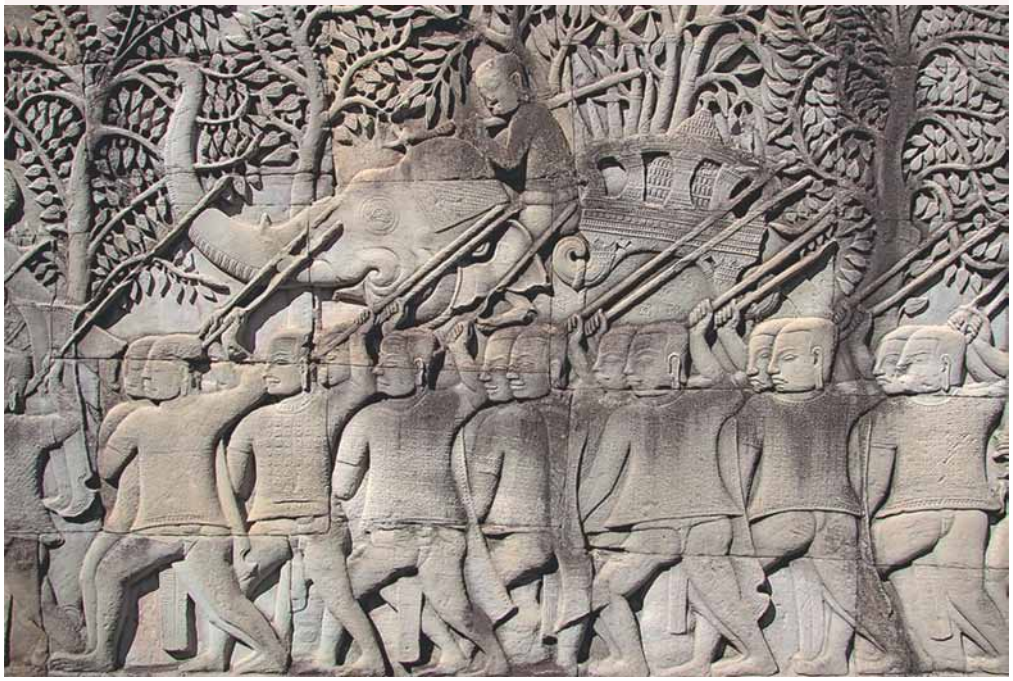
LEARNING INTENTION

By the end of this lesson you should be able to **describe** archaeological and written sources for the Khmer Empire and understand why there are gaps in evidence.

Tune in

It is amazing that Cambodian sculptors around about eight centuries ago could produce such art as the sculpture in **SOURCE 1**.

SOURCE 1 A stone relief sculpture at the Bayon Temple in Angkor Thom, Cambodia, carved between the end of the twelfth century and the beginning of the thirteenth century



What event do you think this sculpture could be depicting?

8.2.1 How do we know about Angkor and the Khmer Empire?

In this topic, we will be studying South-East Asia during the time of the Middle Ages in Europe. Many historians call this the Classical Period of South-East Asia because it was a time when powerful states emerged, along with great achievements in art and architecture. You will notice some remarkable similarities between China, India and some ancient civilisations of the Mediterranean region; however, you will also notice great differences.

The main focus of this topic will be on the Khmer Empire, which was based in Cambodia from about 802 to 1431. To understand how Khmer society developed, we need to examine the bigger picture and study how this civilisation fits in the history of South-East Asia as a region. Khmer society both influenced and was influenced by neighbouring civilisations. This is because, at its height, the Khmer Empire controlled much of modern Thailand, Laos and Vietnam.

Legendary history

Many details of the history of South-East Asian societies are still a mystery. Like the ancient Greeks, Romans, Chinese and others, these societies had legends about their origins. However, these legends are sometimes contradicted by other sources. For example, there are legends that place **Tai** peoples in northern Thailand long before archaeological evidence does.

Inscriptions and other written sources

SkillBuilder discussion

Using historical sources

1. What do you think was the purpose of creating such enormous sculptures at Angkor?
2. How do the relief sculptures at Angkor depict the daily life and cultural practices of the Khmer Empire?
3. What similarities and differences can you identify between the artistic styles of Angkor and those of other ancient civilisations?

The only written primary sources from most South-East Asian societies during this period are inscriptions on materials such as stone pillars and gold foil. Sources from other societies can provide more information. For example, Chinese records discuss contact with parts of South-East Asia. The most useful of these is an account written by Zhou Daguan, a Chinese diplomat who stayed at the **Khmer** royal court at Angkor in 1296–97. Also, from the sixteenth century, we have records from European contacts.

Archaeological evidence

The most striking evidence comes from archaeological sites, especially temples. The most impressive of all the temple complexes is at Angkor, the capital of the Khmer Empire at the height of its power. Angkor's temples were originally **Hindu** temples, but they later became **Buddhist** and had images of **Buddha** added to them. Inscriptions in the Angkor temples tell us about religion and rulers. Relief sculptures, such as the one in **SOURCE 1**, show scenes that include peasants ploughing fields, women in childbirth, market scenes, palace life and soldiers going to war. Evidence from Angkor also helps us to gain an understanding of neighbouring societies, such as the emerging kingdoms in Thailand that were influenced by Angkor.

SOURCE 2 Enormous sculpted faces tower over the Bayon Temple at Angkor.

SOURCE 3 A relief sculpture at Angkor

8.2 SkillBuilder activity USING HISTORICAL SOURCES

1. Study **SOURCE 2** in this lesson. Make notes on anything interesting you notice or would like to know about it.
2. Answer the following questions.
   a. **Suggest** when these enormous sculptures might have been created.
   b. **Describe** what you think they depict.
3. **Propose** three other historical questions you could ask about the source to learn more.

8.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 5	4, 6, 7, 8	9, 10

REMEMBER AND UNDERSTAND

1. The Khmer Empire was dominant in Cambodia from about _____ to _____ CE.
2. Which of the following is *not* an important source of information regarding South-East Asian societies?
   A. European contacts
   B. Written inscriptions
   C. Archaeological sites
   D. Australian records
   E. Chinese records
3. **Determine** whether the following is True or False. The only written primary sources from most South-East Asian societies during this period are inscriptions on materials such as stone pillars and gold foil.
4. **Explain** why we should be careful about trusting stories in legends.
5. **Identify** what kinds of evidence can be found at the archaeological site at Angkor.

ANALYSE AND APPLY

6. Look again at **SOURCE 1**.
   a. **Describe** the details of this relief sculpture.
   b. **Describe** how the Khmer soldiers are dressed and armed.
   c. Who or of what rank do you think the figure on the elephant could most likely be? **Justify** your response.
   d. **Identify** what role you think elephants could have played in such wars.
   e. **Explain** what attitude to war is conveyed in this sculpture.
7. **Identify** what kinds of craft or skills would have been needed to create **SOURCES 1**, **2** and **3**.
8. **Explain** how a society would have to be organised to enable it to create works such as those shown in **SOURCES 1**, **2** and **3**.
9. **Identify** what kind of commodity Khmer society would have needed to produce a surplus of to enable vast numbers of people to work creating **SOURCES 1**, **2** and **3**.

EVALUATE AND COMMUNICATE

10. Based on the sources in this lesson, **propose** three questions you could ask to investigate what changed in Cambodia between the rise and fall of the Khmer Empire.

Answers and sample responses for this topic are available online.

LESSON 8.3 How much did geography influence Khmer civilisation?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** how the geography of South-East Asia influenced the development of Khmer civilisation.

Tune in

These children were photographed in Cambodia during the late twentieth century.

1. **What do you see in this photo? Describe what the children are wearing and describe their environment.**
2. **In what ways do you think this scene would have appeared much the same and how would it have looked different before and during the time of the rise of the Khmer Empire?**

SOURCE 1 Cambodian children playing

8.3.1 Geographical features

South-East Asia includes countries north of Australia, south of China and east of India. While Chinese culture influenced Vietnam, Indian culture dominated Myanmar, Thailand, Laos and Cambodia.

This region's tropical climate features wet and dry seasons, with a cooler season in upland areas. South-East Asia is geographically diverse, with river valleys like the Mekong Delta in Vietnam, dense rainforests in western Malaysia, and dry zones in Myanmar and northeastern Thailand. Populations traditionally concentrated in lowlands and along rivers, lakes and coasts for fresh water, fertile soil and trade access.

Maritime South-East Asia comprises Indonesia, Malaysia, Brunei, Singapore, the Philippines and Timor-Leste. Hinduism was the first major religion here, but Islam became dominant in Indonesia and Malaysia by the thirteenth century due to the influence of Muslim traders. The Philippines and Timor-Leste have mostly Roman Catholic populations due to Portuguese and Spanish colonisation.

Mainland South-East Asia

This is made up of Burma, Thailand, Laos, Cambodia and Vietnam. In these countries, the dominant religion is **Theravada Buddhism**, which will be explored later in this topic.

SOURCE 2 A map of modern-day South-East Asia showing landforms, rivers and cities

Source: Spatial Vision

8.3.2 Peoples in South-East Asia

SkillBuilder discussion

Historical questions

1. Study **SOURCES 3** and **4**. Make a list of questions that you would like to ask about these structures.
2. Discuss the purpose of these structures.

Many different peoples and cultures have shaped the history of South-East Asia.

- Austro-Melanesian peoples arrived about 70 000 years ago. They are now only a tiny minority in South-East Asia.
- Malays probably migrated from southern China from about 2500 BCE, settling in the Philippines, Malaysia and Indonesia.
- The Vietnamese migrated from China to northern Vietnam before the second century BCE.
- The Chams probably migrated from Borneo to southern Vietnam before the second century BCE (see **SOURCE 3**).
- Mon peoples and related Khmers spread across South-East Asia from southern Burma into Thailand, Cambodia and southern Vietnam in the early centuries CE.
- Tai peoples migrated from southern China mainly into Thailand, Laos, northern Burma and north-western Vietnam in the tenth century CE (see **SOURCE 4**).

SOURCE 3 The Ponagar Towers in Nha Trang, Vietnam, were built by the Chams between the seventh and twelfth centuries CE. They are the best-preserved relics of the Champa civilisation, which was often at war with the Khmer Empire.

SOURCE 4 This Buddhist *chedhi* (tower) in northern Thailand is believed to have been built around 1100 CE.

People and environment of Angkor

The Khmer homeland, Cambodia, receives an enormous amount of rain during its six-month-long wet season, but almost none during its dry season. The lack of water in dry season meant that settlement was possible only along the rivers. From the ninth century, vast reservoirs were built at Angkor. Over the following centuries, a complicated system of moats and canals was built. The Khmer were able to produce three rice crops each year. This made it possible to feed a large population and to provide the surplus needed to build and maintain Angkor's great temples.

DID YOU KNOW?

The earliest South-East Asian civilisation was the Hindu state of Srivijaya, based on the Indonesian island of Sumatra. Between the sixth and thirteenth centuries, Srivijaya was a trading empire that controlled the Strait of Malacca. Its sailors travelled between India and China exchanging goods from as far as Persia for Chinese silks and porcelains.

8.3 SkillBuilder activity CHRONOLOGY

1. **Create** a table with a column for each of the below:

   Malays Khmers Mons Chams Tais Vietnamese
2. For each of the peoples listed, find the following information and add it to the table.
   a. Where they came from
   b. When they settled in South-East Asia
   c. Where they settled in South-East Asia
3. Using the information from your table, **create** a timeline to demonstrate your understanding of where Malays, Khmers, Mons, Chams, Tais and Vietnamese came from and when and where they settled in South-East Asia.

8.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4	5, 6	7, 8

REMEMBER AND UNDERSTAND

1. **Identify** the two broad areas that geographers divide South-East Asia into.
   A. North and south
   B. Inner-land and coastal
   C. Maritime and mainland
   D. Tropical and dry
2. **Identify** the five countries that make up mainland South-East Asia.
   A. Thailand
   B. Indonesia
   C. Burma (Myanmar)
   D. Cambodia
   E. Singapore
   F. Vietnam
   G. Laos
3. **Identify** why South-East Asian populations have been concentrated mainly in lowlands along rivers, lakes and coasts.
4. **Identify** where the Khmer people originated.
   A. Cambodia
   B. Northern Malaysia
   C. Vietnam
   D. Southern Burma

ANALYSE AND APPLY

5. Look closely at **SOURCE 2**. **Locate** the capitals and other major cities of mainland South-East Asia and **suggest** why they are all on rivers.
6. Angkor, which became the Khmer capital, is located close to Siem Reap in Cambodia. **Suggest** what geographical feature would have enabled it to develop there.
7. The Ponagar Towers in **SOURCE 3** are some of the very few remaining traces of the Cham civilisation. **Identify** the possible cause for few other traces remaining.

EVALUATE AND COMMUNICATE

8. Using **SOURCES 3** and **4** as your evidence, **discuss** what you can tell about the cultures of the Tais and Chams, whose civilisations developed around the same time as the Khmer Empire.

Answers and sample responses for this topic are available online.

LESSON 8.4 What was the historical setting?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** how the political situation among its neighbours enabled the Khmer Empire to grow.

Tune in

Archaeological remains can reveal a lot about a civilisation.

SOURCE 1 Some remains of the Cham civilisation in southern Vietnam

1. **Describe what you can tell about Champa from these remains.**
2. **How does this suggest that Champa's technological achievements would have made the Cham tough enemies for the Khmer?**

8.4.1 Meet the neighbours

In the ninth century, the Khmer king Jayavarman II founded the Khmer Empire in Cambodia. It became the most powerful state in South-East Asia. By the twelfth century it included much of Thailand, Laos and Southern Vietnam. To understand how Angkor was able to hold such power, we need to look at the states around it. There were many kingdoms in mainland South-East Asia during the period of the Khmer Empire.

Burma

- People called the Pyu had kingdoms in upper Burma between the first and eleventh centuries CE. They practised Theravada Buddhism.
- The Mon people in Burma adopted Theravada Buddhism and are believed to have founded the kingdoms of Thaton and Pegu in lower Burma in the ninth century.
- The Bamar (Burman) people founded the city of Bagan in upper Burma in the eleventh century. Its remains include a massive Buddhist temple complex. From 1057 CE, Bagan controlled a vast Burmese empire until it was crushed by invading Mongols in 1287.

Thailand and Laos

- In the sixth century, the Mon founded a network of Theravada Buddhist city-states called the kingdom of Dvaravati along Thailand's Chao Phraya River valley. They founded Haripunchai in northern Thailand in the ninth century. When the Khmer invaded, the Mon perished or were assimilated.
- In the thirteenth century, the Tai kingdom of Lan Na came to power in northern Thailand. In central Thailand, Sukhothai was the most powerful of the Tai states from 1238 to 1350. The main threat to these states came from Burma. Tai peoples also occupied the lowlands of Laos.

SkillBuilder discussion

Continuity and change

1. Look at the map. Can you place todays county names on there?
2. Discuss what you know about these countries in the modern day?

SOURCE 2 A map of civilisations in mainland South-East Asia in 400–700 CE. Over the next few centuries, Dvaravati would expand north. Black line borders show modern states.

Source: Map drawn by Spatial Vision.

Cambodia

- From the third century to the seventh century, the civilisation of Funan covered much of Cambodia. The people of Funan were Khmers and Mons. Funan adopted Hinduism from India.
- From about 630 to 802, a collection of Hindu states called Chenla existed north of Funan in northern Cambodia, southern Laos and eastern Thailand.

Vietnam

- In 207 BCE the state of Nam-Viet was proclaimed in what is now northern Vietnam. A century later, China made it part of its empire. It remained under Chinese control until 939 CE when Vietnam broke away and formed the state of Dai Viet. This state had to resist several Chinese attempts to regain control.
- What is now the coastal part of southern Vietnam was then the Hindu state of Champa. From the eleventh century, Vietnam gradually spread south, taking territory from Champa. Yet in the twelfth century, Champa was powerful enough to attack the Khmer Empire.

Between the ninth century and the twelfth century, most states bordering the Khmer Empire were small and struggling to establish themselves. The Tai peoples' main enemies were the Burmese; the Viets were concerned with the Chinese and Champa. This situation helped the Khmer Empire to expand. However, once strong and united states emerged in Thailand and Vietnam, the Khmer Empire would be under threat.

SOURCE 3 A map of civilisations and empires in mainland South-East Asia in 1100–1200 CE. Blackline borders show modern states.

Source: Map drawn by Spatial Vision.

8.4 SkillBuilder activity CONTINUITY AND CHANGE

1. **Compare** the two maps in **SOURCES 2** and **3**.
2. Make brief notes on:
   - the territorial changes that took place around 400–700 CE
   - the territorial changes that took place during 1100–1200 CE.
3. Using your notes, **describe** the territorial changes that took place around 400–700 CE and 1100–1200 CE in one or two paragraphs.
4. **Explain** which South-East Asian states gained territory over this time.

8.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4, 5	6, 7, 8	9, 10

REMEMBER AND UNDERSTAND

1. **Identify** who founded the Khmer Empire in the ninth century CE.
   A. Jayavar
   B. Jayavarman
   C. Javarman
   D. Jayman
2. The Mon established many kingdoms during the time of the Khmer Empire. From the following, **identify** the kingdom that was *not* founded by the Mon in Burma and Thailand in the ninth century.
   A. Dvaravati
   B. Thaton
   C. Pegu
   D. Haripunchai
3. The city of Bagan was in upper _____ and was founded by the _____ people.
4. **Name** the two kingdoms founded by Tai people in the thirteenth century.
5. **Identify** what Khmer states existed in Cambodia before 802 CE.

ANALYSE AND APPLY

6. **Examine SOURCES 2** and **3**. **Identify** the approximate proportion of modern Vietnam that was in Champa over the period of the two maps.
7. **Describe** the situation in neighbouring countries that enabled the Khmer Empire to expand until the thirteenth century.
8. Referring to **SOURCES 2** and **3**, **describe** the geographical area in which most expansion of the Khmer Empire took place.
9. Briefly **outline** the reason why Champa was a significant enemy of the Khmer Empire.

EVALUATE AND COMMUNICATE

10. **Propose** which civilisations could threaten the Khmer once those civilisations became strong and united.

Answers and sample responses for this topic are available online.

LESSON 8.5 How did the Khmer create an empire?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** how the Khmer Empire changed and expanded its power between the ninth and thirteenth centuries.

Tune in

Secondary sources can provide useful information about significant individuals.

SOURCE 1 From Craig A. Lockard, *Southeast Asia and the Kingdom of Angkor*, The New Oxford World History Series

> The largest and most powerful Golden Age state was the Khmer Kingdom of Angkor in Cambodia, established by King Jayavarman II in 802. The name Angkor derives from the Sanskrit term for 'holy city', and Jayavarman considered himself a reincarnation of Shiva, the Hindu god of destruction and fertility. Jayavarman himself had lived for many years at a Hindu court in Java before returning to Cambodia, indicating the widespread contacts among Southeast Asian states.

Discuss what this source tells us about the founder of the Khmer empire.

8.5.1 The Khmer Empire to the twelfth century

Until 802 CE, Cambodia (Kambuja) was a collection of weak states under Java's Hindu kingdom. In 802, Khmer prince Jayavarman II declared independence, became the God-King, and established four capitals, with Hariharalaya being the most significant. He expanded his realm through wars, alliances and marriages, building Hindu temples as mausoleums.

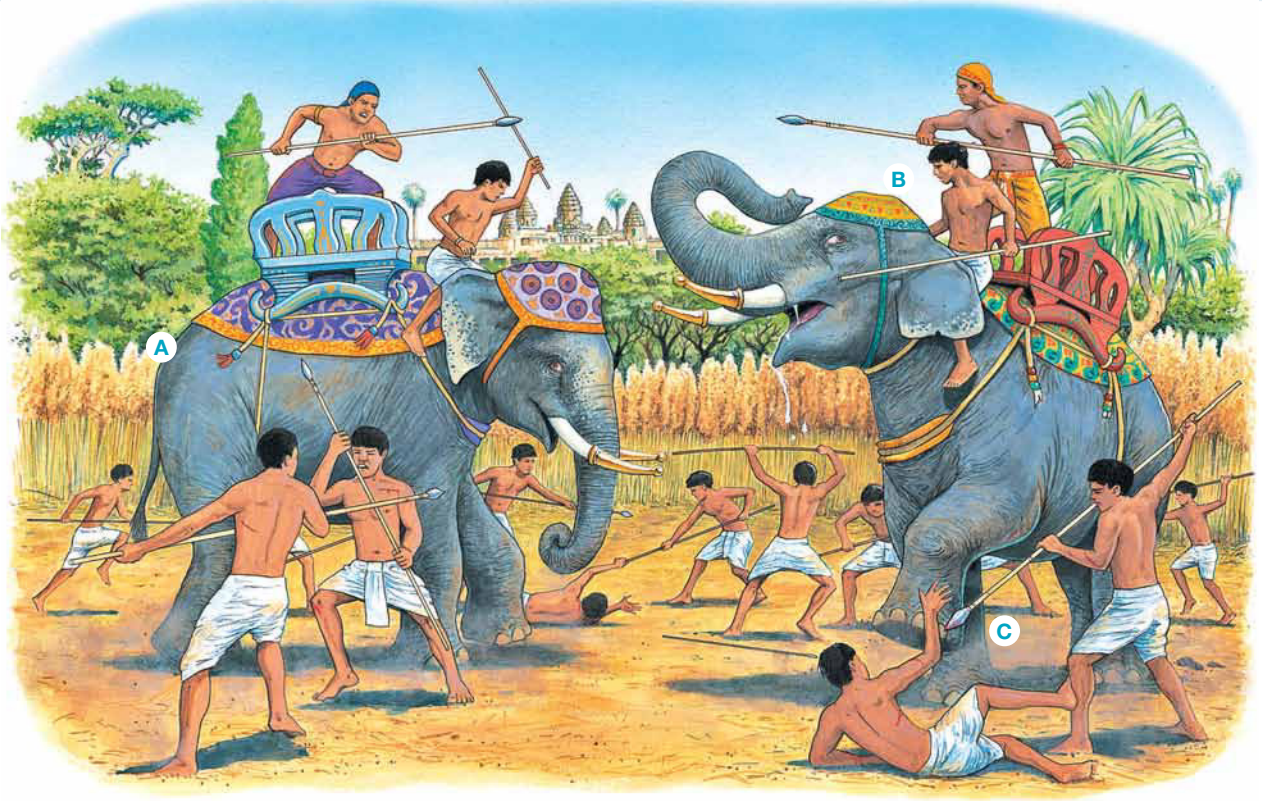
His successors continued to expand the empire and construct temples. Yasovarman I built a new capital, Yasodharapura, and a large reservoir in Angkor. Rajendravarman II built several temples and initiated conflicts with Champa. Under Jayavarman V, the court became a centre for scholars and artists.

Suryavarman II (1113–1150) gained power by defeating a rival prince and extended the empire into Haripunchai, southwestern Thailand, parts of Champa and southern Laos. This expansion often involved local rulers accepting the Khmer king as their overlord rather than his direct rule.

DID YOU KNOW?

Khmer armies used war elephants, cavalry and infantry armed with spears, bows and swords. Elephants were probably first used in war in ancient India. Their use continued in later times because they were effective in breaking up and crushing enemy infantry.

SOURCE 2 A modern artist's depiction of Suryavarman II killing his rival during a battle fought on war elephants



A Evidence suggests the Khmer armies used elephants in battle.
B A person called a mahout sat on the elephant's neck and used a stick to control the elephant.
C Spears were one of the types of weapons used by the Khmer.

SkillBuilder discussion

Historical significance

1. Why were elephants used in battles by the Khmer armies, and how did they help in combat situations?
2. What role did the mahout play in controlling the war elephants, and what tools did the mahout use?
3. What types of weapons were commonly used by the Khmer infantry, and what does this suggest about their combat strategies?

SOURCE 3 Part of the amazing Angkor Wat, commenced under Suryavarman II

Suryavarman II also commenced the construction of the greatest of all the Khmer temples, Angkor Wat. It was built in just 37 years and dedicated to the Hindu god Vishnu. After Suryavarman II's death, the Cham invaded the Khmer Empire in 1177, rowing up the Mekong River and across Tonle Sap in war canoes. They sacked the Khmer capital and killed King Tribhuvanadityavarman.

8.5.2 Jayavarman VII, greatest of the Khmer rulers?

The next Khmer king was Jayavarman VII (1181–c. 1218), who is regarded as the greatest of all Khmer rulers. His history is known mainly through inscriptions and works of art. His name means 'victorious warrior'.

In 1178, after the Cham invaders sacked Yasodharapura, the Khmer capital, and killed King Tribhuvanadityavarman, Jayavarman led a Khmer army that fought to drive the Cham out. His battles on land and water are depicted on the walls of the Bayon Temple in Angkor Thom (see **SOURCES 4** and **5**). He put an end to the claims of his rivals for the kingship and was crowned in 1181. He waged war against Champa for 22 years, conquering its land and extending the Khmer Empire to the southern shores of Vietnam (see **SOURCE 6**). During his long rule, the Khmer Empire reached the greatest extent of its territory and the height of its power.

SOURCE 4 A relief sculpture on the Bayon Temple depicting Cham soldiers in war canoes

SkillBuilder discussion

Using historical sources

1. According to **SOURCE 5**, what were the boundaries of the Khmer Empire during the reign of Jayavarman VII?
2. Which regions are mentioned in the Bayon inscription as being under Khmer control?
3. How did the Khmer Empire engage in trade during the reign of Jayavarman VII?

SOURCE 5 Khmer expansion under Jayavarman VII, from the National Museum of Cambodia

During his reign, the Cambodian kingdom spanned a huge area; extending beyond the Menam Basin to the west (the Bayon inscription mentions the existence of two statues of divinities [gods] guarding the cities of Ratchaburi and Phetburi in Thailand), as far as the seacoast of Champa to the east, as far as the city of Sukhothai ... in the north, all the way down to the southern sea. At the time the Khmers were trading with China, India and other countries of Asia Minor.

Religious changes

Varieties of Buddhism had long been practised alongside Hinduism, but Jayavarman VII was a follower of **Mahayana Buddhism** and, in a truly revolutionary step, he made this the new state religion of the Khmer Empire. His great building program may have been partly aimed at introducing his mainly Hindu population to the symbols of Buddhism, which were provided in sculptures that adorned his temples.

A great building program

According to an inscription discovered in Laos, Jayavarman VII wanted to turn his kingdom into an earthly paradise. He conducted a massive program of public works, building 102 hospitals, many reservoirs, roads with 121 rest houses along them and several temples. The temples included Ta Prohm, in honour of his mother, and Neak Khan, to honour his father. His greatest construction was the capital city, Angkor Thom (meaning 'great city'). Angkor Thom included the Bayon Temple (see lesson 8.8). The construction of Angkor Thom was probably partly a reaction to the sacking of the Khmer capital. Angkor Thom was built with massive walls surrounded by a moat to deter any future invaders. Like other Khmer temples, Angkor Thom also provided for agriculture by having ponds and barays (water reservoirs used for irrigation).

8.5 SkillBuilder activity HISTORICAL SIGNIFICANCE

1. Carefully read **SOURCE 5**.
2. Read it again, this time making notes on anything you find important that might help answer the following question:
   What can you tell from **SOURCE 5** about the extent of Khmer expansion under Jayavarman VII?
3. Now **discuss** the question above using the notes you made. Remember to keep in mind that you are evaluating the significance of the source.

8.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4, 5	6, 7, 8	9, 10

REMEMBER AND UNDERSTAND

1. The Khmer kingdom was founded in _____ in _____ CE.
2. **Identify** which three of the following Yasovarman I and Rajendravarman II constructed in the Angkor area.
   A. Hindu temples
   B. Hospitals
   C. A new capital
   D. A water reservoir
3. **Identify** the ruler under whom the construction of Angkor Wat started.
   A. Jayavarman II
   B. Suryavarman II
   C. Jayavarman VII
   D. Yasovarman I
4. **Explain** how Jayavarman VII became the Khmer king.

ANALYSE AND APPLY

5. **Compose** an inscription that could have been inscribed to honour Suryavarman II's victory as depicted in **SOURCE 2**.
6. Look at Angkor Wat in **SOURCE 3** and **describe** the features that could justify its reputation as the most spectacular of the Khmer temples.
7. **Explain** how significant the religious changes made under Jayavarman VII were and how his subjects might have felt about such big changes.
8. **Describe** Jayavarman VII's public works programs and how they would have benefited the Khmer people.
9. Use **SOURCES 4** and **5** to **explain** how Jayavarman VII had these relief sculptures carved on the walls of the Bayon Temple in Angkor Thom.

EVALUATE AND COMMUNICATE

10. Using evidence from sources in this lesson, **suggest** why you think many historians regard Jayavarman VII as of greater significance than any other Khmer ruler.

Answers and sample responses for this topic are available online.

LESSON 8.6 How did religions influence the Khmer Empire?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** how religious changes affected the Khmer Empire, influencing people's beliefs, art and architecture.

Tune in

Religion has always been an important aspect of life in South-East Asia. Study the young men in **SOURCE 1** and answer the following questions.

1. **Do you recognise the clothing of these young men?**
2. **What religion do you think they belong to?**
3. **Discuss how and why you think that religion came to Cambodia.**

SOURCE 1 Young Buddhist monks at Angkor

8.6.1 Animism and Hinduism

Religious ideas motivated Khmer rulers to build impressive temples. During Angkor's peak, the region saw shifts from Hinduism to two forms of Buddhism, with these religions influencing the Khmer Empire's development.

Animism

Initially, South-East Asian people were animists, believing that natural elements like wind and rain, as well as animals and objects, had spirits. They also worshipped ancestors. When adopting major religions, people often blended them with local beliefs.

Hinduism

Hinduism was the first major religion in South-East Asia, originating in India with gods such as Vishnu and Shiva. Over time, followers began to choose specific deities from the many gods in Hinduism.

SOURCE 2 Shiva is the Hindu god of destruction and regeneration.

SkillBuilder discussion

Historical significance

1. What religious beliefs and practices do you think are reflected in the sculptures?
2. How do the depictions of Shiva and other deities in the sculptures illustrate the influence of Hinduism on the Khmer Empire?
3. Do the sculptures incorporate elements of animism and local beliefs alongside Hinduism and Buddhism?

SOURCE 3 A figure from Banteay Srei, a tenth-century Hindu temple on the outskirts of Angkor

Reincarnation is a key Hindu belief. Hindus believe that a soul exists in each living thing and that performing religious duties and living a moral life leads to being born into a higher class in the next life. Hindus see their goal as the achievement of spiritual joy by eventually being united with Brahma, the universal spirit.

Hinduism in South-East Asia

Hinduism in India divided society into classes called castes. These are Brahman (priests); warriors and landowners; farmers and craftspeople; and untouchables or outcasts. By the ninth century CE, many rulers of South-East Asian states followed Hinduism, but the caste system was never adopted in South-East Asia.

8.6.2 Buddhism

Buddhism was founded by the Hindu prince Siddhartha Gautama in the sixth century BCE. After seeing suffering in his kingdom, he left his wealth to seek truth. He lived as a hermit for seven years before teaching the Four Noble Truths, earning the name Buddha, meaning 'the Enlightened One'.

The Four Noble Truths are:

- Everyone suffers pain, regardless of wealth.
- People are trapped in a cycle of reincarnation and pain.
- Pain is caused by desire.
- To overcome desire, one must follow the Eightfold Path.

The Eightfold Path involves knowing the truth, freeing the mind from evil, serving neighbours and meditating to eliminate desire. Following this path leads to nirvana.

Buddhism in South-East Asia

After Buddha's death, Buddhism split into Mahayana and Theravada forms. Mahayana Buddhism, which worships the Buddha, first influenced South-East Asian rulers. Theravada Buddhism, focusing on Buddha's teachings, arrived from Sri Lanka. Theravada monks supported others on the Eightfold Path, with ordinary people supporting the monks to 'make merit'. Buddhist temples called wats became community centres and pilgrimage sites.

DID YOU KNOW?

Theravada Buddhism was the main form of religious worship in mainland South-East Asia by the fourteenth century and it remains so today. It is the state religion of both Cambodia and Thailand.

Bodhisattvas

In Buddhist belief, a bodhisattva is a being who is working towards enlightenment. In Mahayana Buddhism, Avalokiteshvara is one of the most revered bodhisattvas, one who has vowed to help others to achieve nirvana.

8.6.3 Religious art, architecture and literature

Indian and Sri Lankan traders and priests introduced Hinduism, Buddhism and artistic ideas to South-East Asia, influencing sculpture, dance and architecture. By 500 CE, India had imparted Hindu gods, Buddhist concepts, a writing system (Sanskrit) and governance ideas to Cambodia, which shaped Angkor. Although inspired by India, Angkor developed its unique Cambodian identity and, in turn, influenced other South-East Asian societies. Buddhist rulers built temples and monasteries, decorating them with religious artworks, to gain merit and reinforce their legitimacy as pious leaders.

SkillBuilder discussion

Using historical sources

1. What elements in the mural show the influence of Hindu epic stories in South-East Asian art and culture?
2. How do the characters and scenes from the Ramayana in the mural reflect the religious beliefs and values of the society that created it?
3. Why is it significant that the Ramayana, an Indian Hindu epic, has been depicted in a mural on a temple wall in Bangkok?

SOURCE 4 A mural on a temple wall in Bangkok depicting a scene from the *Ramayana*

Influence of the Ramayana

Indian Hindu literature came to South-East Asia along with Indian religious ideas. The *Ramayana* is one of two great Hindu **epic** stories. The other is the *Mahabharata*. The *Ramayana*'s 24 000 verses were composed in the eighth century BCE. Its hero, Rama, is an **incarnation** of the Hindu god Vishnu. The purpose of the story was to demonstrate the *dharma* (right path that people should take in life). From the eighth century BCE, the *Ramayana* had an enormous influence in South-East Asia, and it has been depicted in temple art, architecture, theatre and dance.

SOURCE 5 One of the many statues of guardian giants at Wat Phra Kaew in Bangkok. These mythical creatures are from the *Ramayana*.

8.6 SkillBuilder activity USING HISTORICAL SOURCES

1. The faces of the Bodhisattva in **SOURCE 6** are believed to be modelled on the face of Jayavarman VII, who made Mahayana Buddhism the state religion of the Khmer Empire. Use the information in this lesson and conduct research to **investigate** the following questions:
   a. What was a Bodhisattva?
   b. Why was Avalokiteshvara revered?
   c. Why would Jayavarman VII have wanted his people to see him as the Bodhisattva Avalokiteshvara?

SOURCE 6 Giant faces of the Bodhisattva Avalokiteshvara at the approach to the Bayon Temple at Angkor Thom

2. **Communicate** your findings in a paragraph.

8.6 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4, 5	6, 7, 8	9, 10

REMEMBER AND UNDERSTAND

1. **Identify** which of the following religions influenced South-East Asia. **Select** all that apply.
   A. Animism
   B. Christianity
   C. Hinduism
   D. Buddhism
2. **Identify** from where the Khmer Empire got its ideas about the arts, architecture and religion.
   A. Chinese and Vietnamese
   B. Indians and Vietnamese
   C. Indians and Sri Lankans
   D. Sri Lankans and Chinese
3. **Identify** whether the following is True or False. The Hindu belief of reincarnation is that people are continuously born and reborn, and that performing religious duties and living a moral life leads to being born into a higher class/caste in the next life.
4. Using your knowledge of Buddhist beliefs, **explain**:
   a. what the Four Noble Truths are
   b. what happens when a soul reaches Nirvana.
5. **Explain** the beliefs of animists.

ANALYSE AND APPLY

6. Banteay Srei, the Hindu temple in **SOURCE 4**, means 'citadel of the women' and its fine carvings are said to be the work of a woman. **State** whether you think this is true. **Justify** your response.
7. **Describe** what you see in **SOURCES 5** and **6** and explain what evidence they provide of the influence of ideas that came into South-East Asia from India.
8. Using the sources and information in this lesson, **describe** the role that the Khmer Empire played in spreading religious, artistic and cultural traditions from the Indian subcontinent in South-East Asia.
9. **Explain** what benefits rulers would have gained by paying for religious art and architecture.

EVALUATE AND COMMUNICATE

10. **State** whether the move in the Khmer Empire from Hinduism to Buddhism should be regarded as continuity or change, or both. **Justify** your answer.

Answers and sample responses for this topic are available online.

LESSON 8.7 What was life like in the Khmer Empire?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** how Khmer society operated and how it differed for men and women and for different social classes.

Tune in

Zhou Daguan, the Chinese ambassador who stayed at Angkor between 1296 and 1297, has provided the only written account of life in the Khmer Empire apart from inscriptions on temple walls, which provide very little information about ordinary people.

SOURCE 1 From Zhou Daguan's descriptions of aspects of Khmer life

The dwellings of the princes and principal officials all have a completely different layout and dimension to those of the people ... The official rank of each person determines the size of the houses.

From the king down, the men and women all wear their hair wound up in a knot, and go naked to the waist, wrapped only in a cloth. When they are out and about they wind a larger piece of cloth over the small one.

The soldiers, too, go naked and barefoot. In their right hand they carry a lance, and in their left hand a shield. They have nothing that could be called bows and arrows, trebuchets, body armour, helmets, or the like. I have heard reports that when the Siamese attacked, all the ordinary people were ordered into battle, often with no good strategy or preparation.

The local people who know how to trade are all women.

1. **What does this source tell you about equality and inequality?**
2. **What does it tell you about clothing, hairstyles and work?**

8.7.1 Kings, nobles and officials

During the Middle Ages, European kings claimed divine selection, similar to Chinese emperors with their 'mandate of heaven'. In the Khmer Empire, rulers were seen as semi-divine, blending human and godly attributes. They asserted connections to Hindu gods like Shiva or Vishnu and introduced the concept of the *devaraja* or 'god-king', symbolising power and fertility through linga worship.

Khmer rulers often gained power through practical means, including violent power struggles within ruling families. Many ascended the throne by overthrowing rivals, reflecting a mix of divine claims and practical politics.

DID YOU KNOW?

In Vietnam and China, officials were chosen through examinations, and there were very detailed written laws describing the powers of officials at each level. There was no such system in the Khmer Empire or the Buddhist kingdoms in Thailand and Burma.

Kings depended on officials to administer their kingdoms. The larger the Khmer Empire grew, the more power such officials held. It was only at the centre of the kingdom that the ruler had complete power. There, the officials were usually friends or relatives of the ruler. They were drawn from the land-owning **nobles** and many of them inherited their positions. In the distant provinces, governors had almost complete power, as long as they did not threaten the ruler's authority.

SOURCE 2 A relief sculpture on the Bayon Temple depicting the Khmer army going to war against the Chams

8.7.2 Women in Khmer society

The family was the basic unit of society but it is not known how men, women and children lived within their families. Evidence from neighbouring societies suggests that women had a more important position than in India or China. However, society probably became more male-dominated as Hindu and Buddhist ideas about the roles of men and women gained influence over traditional beliefs.

Chinese diplomat Zhou Daguan wrote that women sold products displayed on mats in the market and that all trades were carried out by women.

Many women danced. Dance was a religious ritual in Cambodia during the Angkor period. Inscriptions tell of thousands of dancers performing in the temples. These temple dancers were regarded as *apsaras*, which in Hindu and Buddhist mythology is a female spirit of the clouds.

SOURCE 3 A modern Cambodian woman performing a Khmer classical dance

8.7.3 The ordinary people

SkillBuilder discussion

Continuity and change

1. Describe the dress of the classical Khmer temple dancer.
2. Temple dancers were regarded as *apsaras*. What does this mean?
3. What changes can be observed in the societal roles of women from the Angkor period to present-day Cambodia?

The survival of the Khmer Empire depended on ordinary people. Despite this, there is very little evidence that describes their lives. We know that they provided the surplus of food that supported the ruling classes. The people also provided labour for the rulers' building projects and were soldiers for wars. They included peasants, skilled artisans, fishermen, traders and slaves.

Peasants

Peasants were the largest group among ordinary people. They had the right to farm land without owning it, cultivating rice in fertile valleys and vegetables on slopes. Their lives followed the farming cycle of ploughing and harvesting based on seasons, influenced by Hinduism, Buddhism and animism (spirit beliefs).

Peasants lived in villages with thatched-roof houses, lacked tables and chairs, cooked in earthen pots and ate from leaf bowls, as noted by Zhou Daguan.

Village headmen, typically more prosperous peasants, enforced the ruler's policies, organised unpaid labour for projects, maintained irrigation, collected taxes and ensured men joined wars.

SOURCE 4 A relief sculpture at the Bayon Temple depicting Khmers at work, probably on the temple

Artisans, fishermen and traders

An artisan was a worker who was skilled in a particular craft, such as sculpture, building, pottery, jewellery or metalwork. Artisans were a small proportion of the population but they were essential for their role in building projects and supplying luxury goods for the ruling class, and weapons for war. According to Zhou Daguan, artisans included Thai immigrants who worked in silk production and as tailors.

Fishermen harvested the coasts and rivers and their lives were mostly as unchanging as those of the peasants. Traders sold goods at markets that moved about between villages. There was also long-distance trade. Zhou Daguan described a range of Chinese goods that were sold at Angkor including paper, combs and needles. Many traders knew something of the world beyond the village because they took caravans across South-East Asia. They were a small group that would grow in importance as trade expanded from the eighteenth century.

SOURCE 5 From Milton Osborne, *Southeast Asia: an Introductory History*, Allen & Unwin, Sydney, 2004, pp. 59–60

The courts and kings were separate from the cultivators, fishermen and petty traders over whom they ruled. But all these groups inhabited a single, unified world. Just as the serf and the feudal lord of medieval Europe both, in very different ways, sensed themselves to be part of Christendom, so the cultivators or fishermen sensed themselves as being within the same world as their ruler ...

Slaves and outsiders

The exact number of slaves is unknown. Most were prisoners of war or their descendants, considered property by their owners, including temple slaves. Debt bondsmen temporarily forfeited freedom to repay debts, similar to hereditary household servants of rulers and officials.

Smaller ethnic groups lived in the hills and were seen as barbarians by lowlanders but were left alone if they posed no threat. These tribes practised nomadic slash-and-burn agriculture, trading forest products for lowland goods. They were sometimes enslaved or recruited as guides, soldiers and suppliers of slaves.

The lives and work of children

We have almost no direct evidence about how children lived and worked in the Khmer Empire. The little evidence that we have suggests that only the sons of the most privileged classes and of scholars received any kind of formal education. Among other sections of Khmer society — peasants, artisans, fishermen and traders — children would have worked alongside their parents, learning their skills, as soon as they were old enough to be useful.

8.7 SkillBuilder activity CONTINUITY AND CHANGE

We have almost no evidence of what ordinary people thought about their place in Khmer society.

In groups, **discuss** the following questions:

1. Would the common people have seen things from the same perspectives as their rulers?
2. Do you think the religious beliefs of the people would have encouraged them to rebel or to accept things as they were?

8.7 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4, 5	6, 7, 8	9, 10

REMEMBER AND UNDERSTAND

1. **Identify** the services peasants provided for the ruling classes. **Select** all that apply.
   A. They produced food.
   B. They entertained the rulers with musical performances.
   C. They maintained irrigation systems.
   D. The worked on building projects.
   E. They educated the Khmer ruler's children.
   F. They filled the ruler's army.
2. **Determine** whether the following statement is True or False. The minority ethnic groups who lived in the mountains had an active role in mainstream society.
3. **Determine** whether the following statements are True or False.
   a. The influence of religious ideas decreased the dominance of men over Khmer women.
   b. The ruling class in South-East Asian Buddhist societies claimed to have magical powers.
   c. The smaller ethnic groups who lived in the hills were regarded as equal to the lowlanders by the ruling class.
4. **State** how Khmer kings wanted to be seen by their people and **explain** why they would want to be seen that way.
5. **Explain** why a Khmer ruler usually had control only at the centre of his kingdom.

ANALYSE AND APPLY

6. Examine **SOURCE 1** again. **Compare** what this source tells us about the Khmer army with evidence in lesson 8.9 **SOURCE 1**. **Explain** what these sources disagree about. If Zhou Daguan was wrong about weapons, **determine** to what extent we can trust all the other information he provides.
7. In **SOURCE 2**, **determine** which soldiers would probably be the ruler or nobles, and which would be from the ranks of the ordinary people. **Explain** how you can tell.
8. **Explain** what **SOURCES 3** and **4** can tell you about one role of women in Khmer society.
9. **Explain** what the writer of **SOURCE 5** would mean in saying 'the cultivators or fishermen sensed themselves as being within the same world as their ruler ...' (*Hint:* What religious beliefs and values would they have shared?)

EVALUATE AND COMMUNICATE

10. **Propose** why it is most likely that the lives of ordinary Khmer people would have changed very little during the period of the Khmer Empire.

Answers and sample responses for this topic are available online.

LESSON 8.8 Why are Angkor's buildings famous?

LEARNING INTENTION

By the end of this lesson you should be able to **identify** the major buildings of the city of Angkor and describe the enormous achievement involved in creating these structures.

Tune in

The city of Angkor contains many sculptures and carvings (such as in **SOURCE 1**) that serve as valuable historical sources.

1. **Describe the figures in this relief carving.**
2. **Who might they portray and why do you think they and thousands more were carved on temple walls?**

SOURCE 1 Wall carvings at Prasat Bayon Temple, Angkor Thom

8.8.1 The city of Angkor

Angkor Wat, meaning 'temple city' in Khmer, is the world's largest religious structure near Siem Reap, Cambodia. Part of the vast Angkor temple complex, it was part of a city that spanned over 1800 square kilometres in the twelfth and thirteenth centuries, making it the largest pre-industrial city. At its peak, Angkor had over a million residents compared to London's 40 000. The temples have survived due to their stone and brick construction, unlike the wooden houses. Angkor also featured an extensive water reservoir system, used for irrigating rice crops and symbolising Hindu mythology.

Angkor Wat

The building of Angkor Wat was commenced under Suryavarman II (1113–1150 CE). It was a shrine to the Hindu god Vishnu with whom Angkor's kings identified themselves. Its central tower represents Mount Meru, a mountain from Hindu mythology. Angkor Wat is the best preserved of the Angkor temples because, unlike the others, it was never completely abandoned. The temple's rectangular outer walls are surrounded by a huge rectangular moat. The walls measure 1025 metres by 800 metres. Relief sculptures line almost a kilometre of the outer walls. These sculptures include scenes from Hindu mythology including the *Mahabharata* and *Ramayana*, scenes of the king and the Khmer army at war, the Hindu heavens and hells, and over 3000 *apsaras*. Khmer inscriptions state that 300 000 workers and 6000 elephants were employed during the construction of Angkor Wat.

Angkor Thom

Thom is a Khmer word meaning 'large', so Angkor Thom means 'large city'. Much bigger than Angkor Wat, its area is around ten square kilometres. It was built under Jayavarman VII (1181–c. 1218 CE) and has huge 20-metre-high gates. Above the gates tower giant faces of the Buddhist Bodhisattva Avalokiteshvara. Within the city walls are its most important monuments and buildings, including the Bayon Temple, which stands at the centre of the city. Bayon has over 11 000 carved figures that cover about 1.2 kilometres of walls. They include scenes of battles against the Chams and scenes from everyday life including circus performers and a market.

SOURCE 2 A diagram showing some of the most important buildings in Angkor

SkillBuilder discussion

Historical significance

1. Examine the important buildings and temples on the map. Discuss the construction cost, including the people, materials and resources needed.
2. Do you think the cost of building such great temples could have contributed to Angkor's decline?

SOURCE 3 Rows of Angkor relief sculptures

8.8 SkillBuilder activity USING HISTORICAL SOURCES

Read **SOURCE 4** carefully and make notes on anything that can help you answer the questions that follow.

SOURCE 4 The following extracts are from Alison K. Carter and others, *Temple occupation and the tempo of collapse at Angkor Wat*, Cambodia, PNAS, 2019. Their conclusions are based on excavations and carbon dating.

[Angkor Wat] was initially in use from the 11th century CE with subsequent habitation until the 13th century CE. Following this period there is a gap in our dates. However, Angkor Wat was never completely abandoned, as the dates suggest that the mounds were in use again in the late 14th–early 15th centuries until the 17th or 18th centuries CE. This break in dates points toward a reorganization of Angkor Wat's enclosure space, but not during the historically recorded fifteenth century collapse. ... Angkor's demise has been conventionally dated to 1431 CE, when Thai chronicles state that the city was attacked by the neighbouring [Thai] kingdom of Ayutthaya and the elites and royals fled south to settle near the modern city of Phnom Penh. ... In fact, increasing evidence supports the interpretation that the decline of the Angkorian state was prolonged and [complicated].

1. a. **Identify** over what centuries Angkor Wat was used before there was a gap in its use.
   b. **Identify** over what second period it was used.
   c. **Explain** what this research says about the conventional theory that Angkor collapsed soon after it was attacked by Ayutthaya.
2. Compose a brief paragraph **explaining** the changes that occurred to Angkor Wat as outlined in the source.

8.8 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4, 5	6, 7, 8	9, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statements are True or False.
   a. Angkor Thom is older than Angkor Wat.
   b. Angkor, when it was the capital of the Khmer Empire, had a population of more than a million people.
   c. Angkor Wat was built for Buddhist worship, while Bayon Temple in Angkor Thom was built to honour a Hindu god.
2. The building of Angkor Wat was commenced under **Jayavarman VII** / **Suryavarman II** and was a shrine to the **Hindu** / **Buddhist** god Vishnu.
3. **Describe** what the words *Angkor, baray, wat* and *Thom* mean.
4. **Identify** approximately how many temples there are in the city of Angkor.
   A. Around 10
   B. Around 50
   C. Around 100
   D. More than 1000
5. **Determine** how many times greater was the population of Angkor than the population of London in the twelfth and thirteenth centuries.
   A. 5
   B. 15
   C. 25
   D. 35

ANALYSE AND APPLY

6. Study the map in **SOURCE 2** and **calculate** how many times Angkor Thom is bigger than Angkor Wat.
7. If 300 000 workers and 6000 elephants were needed to construct Angkor Wat, **estimate** how many might have been needed to build Angkor Thom.
8. **Explain** why highly specialised artisans would have been needed to create sculptures such as those in **SOURCE 3**.
9. Several feature films have been made around Angkor. **Describe** what kinds of impacts this could have had on the buildings.

EVALUATE AND COMMUNICATE

10. **Evaluate** what evidence in this lesson explains why Angkor Wat is better preserved than most of the Angkor site.

Answers and sample responses for this topic are available online.

LESSON 8.9 Why did Angkor and the Khmer Empire decline?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** how Angkor's decline could be attributed to multiple causes, including wars and environmental and climate change.

Tune in

SOURCE 1 depicts Khmer soldiers armed with spears and bows and arrows.

1. **Describe the figures in this relief carving. How are they armed?**
2. **Do you think this source contradicts the evidence of Zhou Daguan in lesson 8.7 SOURCE 1? Explain your response.**

SOURCE 1 A relief sculpture at Angkor

8.9.1 A weakening empire

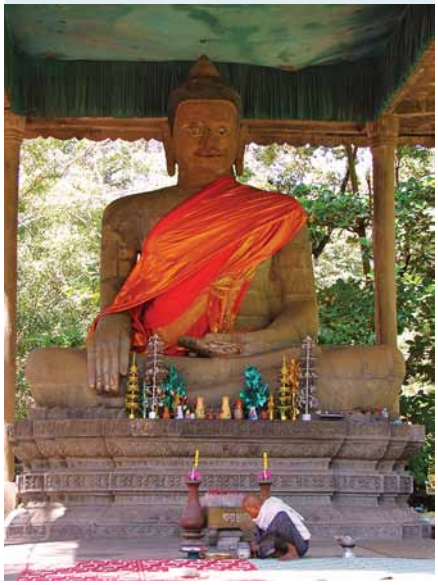
After the death of Jayavarman VII, no more temples were built. The Khmer lost much of the territory they had conquered in Champa to their east. In the west, several Tai nobles rebelled against Khmer authority, establishing the first Tai kingdom at Sukhothai in 1238. These territorial losses and other developments seriously weakened the Khmer Empire.

Religious conflict and external threats

Religious conflict existed within the Khmer ruling family. Jayavarman VIII (1243–1295) sought to restore Hinduism, converting Buddhist temples and destroying Buddha images. To avoid war with the powerful Mongol Empire, which conquered China in 1260, he paid tribute in 1283, making the Khmer Empire temporarily a vassal state. This decision proved wise when the Mongols captured Bagan.

Jayavarman VIII was overthrown by his son-in-law, Srindravarman (1295–1309), who introduced Theravada Buddhism. This religion quickly became dominant in the Khmer Empire and South-East Asia. The end of Indrajayavarman's reign in 1327 marked the end of the Khmer Classical Age, with no further inscriptions or temple constructions. It is suggested that the shift to Theravada Buddhism may have weakened the power of Khmer kings.

SOURCE 2 A modern Khmer worshipping at a huge Theravada Buddhist statue at Angkor



8.9.2 Why was Angkor abandoned?

From 1352, the Khmer suffered attacks by the Tai kingdom of Ayutthaya. For a while, the Khmer Empire remained powerful but in the 1440s the Khmer rulers abandoned Angkor. The most widely accepted explanation is the one put by Milton Osborne. He stated that the Tais 'threatened and eventually damaged the agricultural system upon which Angkor's very existence depended'. But this may not have been the only reason for Angkor's collapse. Several other hypotheses have been advanced to explain why Angkor was abandoned.

Environmental damage

One theory suggests that environmental damage may have played a role as forests were cut down to clear land for more rice fields. This resulted in topsoil being carried by floods into the barays and canals, causing them to silt up and flood. Once this happened, there would have been flooding in the wet season and water shortages in the dry season. The population might have been afflicted with malaria. In any case, Angkor would no longer have been able to support its large population.

SOURCE 3 The base of the Hindu temple called the Eastern Mebon is guarded by carved figures of elephants. The temple is on an island in the Eastern Baray, one of two giant water reservoirs that were created to provide year-round water for farming. The barays were created by building huge dykes to hold floodwaters.

The Black Death

It has been suggested that the Black Death (bubonic plague) could have been a factor in Angkor's decline. The plague, which killed many millions in Asia, Europe, the Middle East and Africa, appears to have originated in Mongolia and central China in the early 1300s and it is known to have spread west along trade routes, including the Silk Road. Although the plague appears in reports from several parts of Asia from the 1330s and it could possibly have reached Cambodia from China, there is no hard evidence of it visiting the Khmer Empire.

Climate change

Another theory suggests that climate change could have caused a shortage of water during the 'Little Ice Age'. This was a period of lower global temperatures.

SkillBuilder discussion

Using historical sources

1. Use the information in **SOURCE 4** to identify the climate factors that may have contributed to Angkor's decline.
2. How might tree rings help historians to understand what happened to the climate?
3. Discuss the impact of the climate factors on the Khmer.

SOURCE 4 Climate as a contributing factor in the demise of Angkor, Cambodia, Proceedings of the National Academy of Sciences, 2010

[Angkor] experienced decades-long drought interspersed with intense monsoons in the fourteenth and fifteenth centuries that, in combination with other factors, contributed to its eventual demise. The climatic evidence comes from ... tropical southern Vietnamese tree rings ...

Royal family conflicts and retreat from the Tais

Without doubt, other reasons were ongoing conflicts within the Khmer ruling family and attacks by the Tais. These attacks stripped the city of its wealth and people. After the Tais besieged Angkor for seven months in 1431, a new Cambodian capital was founded in the southeast near the modern capital, Phnom Penh. The move was significant as trade became more important to the Khmer economy. The new capital was located on a river much nearer to the sea and was therefore a more suitable site for Cambodia's growing trade with China.

SOURCE 5 Written by the Chinese diplomat Zhou Daguan, who stayed at Angkor in 1296–97

As a result of repeated wars with the Siamese [Tais] the land has been completely laid to waste.

8.9 SkillBuilder activity **USING HISTORICAL SOURCES**

1. **Create** a table with five columns. Label the columns from **SOURCE 1** to **SOURCE 5**. Each column will refer to a source in this lesson.
2. Study each source carefully and make notes on what they tell you about the changes that could have contributed to the weakening of the Khmer Empire.
3. Using your notes, write a paragraph **suggesting** four possible changes that could have contributed to the weakening of the Khmer Empire.

8.9 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4, 6	7, 8

REMEMBER AND UNDERSTAND

1. In which two places did the Khmer Empire lose territory after the death of Jayavarman VII?
   A. Champa
   B. Vietnam
   C. Thailand
   D. Indonesia

2. **Determine** whether the following statement is True or False. The Khmer Empire was conquered by the Mongol Empire during the reign of Jayavarman VIII.
3. **Describe** how Khmer religion was changed again under Jayavarman VIII.
4. **Identify** what religious change was made under Srindravarman.
5. The Khmers abandoned Angkor from the year _____.

ANALYSE AND APPLY

6. a. **Examine** the Buddha statue in **SOURCE 2**. **Propose** how the Khmer people would have regarded the sequence of religious changes between the twelfth and fourteenth centuries.
   b. **Explain** whether such changes could have undermined faith in Khmer rulers. **Justify** your response.

EVALUATE AND COMMUNICATE

7. Angkor's agriculture depended on giant barays like the one in **SOURCE 3**. **Predict** what would have been the impact if these reservoirs failed due to environmental damage.
8. a. Read **SOURCE 4** and **evaluate** the theory that climate change could have played a role in the weakening of the Khmer Empire.
   b. **Identify** which theory about Angkor's abandonment is supported by Zhou Daguan in **SOURCE 5**.

Answers and sample responses for this topic are available online.

LESSON 8.10 What are the legacies of the Khmer Empire?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** why there are many legacies of the Khmer Empire, including its influences on neighbouring societies.

Tune in

As suggested by **SOURCE 1**, The late Thai king and his family were much revered in Thailand, much as Khmer kings appear to have been over many centuries.

1. **Describe the scene.**
2. **It has long been a crime punished by imprisonment under Thai law to criticise the monarchy. Why do you think this is?**
3. **It is only since the king's death that the powers of the Thai royal family have been seriously challenged. Why do you think this has happened?**

SOURCE 1 A Theravada Buddhist monk stands before a portrait of Thailand's royal family at fourteenth-century Wat Prathat Doi Suthep in northern Thailand.

8.10.1 Legacies for other South-East Asian societies

Angkor is the Khmer Empire's greatest legacy. This city was its capital and its central area of settlement. Angkor provides evidence of Cambodia's past wealth, strength, culture and religious beliefs. Many thousands of people visit Thailand, Laos and Cambodia each year to marvel at amazing historical sites. This is called cultural tourism. Of all these historical sites, Angkor is arguably the most spectacular; however, it is not the Khmer Empire's only legacy.

The Khmer Empire had cultural and trade relations with other mainland South-East Asian kingdoms and with the maritime South-East Asian states of Java and Srivijaya. Through trade and cultural exchange, and through its rise and fall, the Khmer Empire influenced much of the region.

Khmer influence in Thailand

Angkor's civilisation influenced Thai systems of ruling, the way Thai society was organised, Thai architecture and arts, and the development of the Thai written language. From the sixteenth century, Europeans knew Ayutthaya's Thai empire as Siam. By 1700, Ayutthaya was a vast city with around a million people that traded with the Dutch, French, Chinese and Japanese. But in the eighteenth century, its power declined and in 1776 the Burmese destroyed the city.

SOURCE 2 The Khmer written language (a) influenced the development of the Thai written language (b).

Khmer influence in Laos

In Laos in 1353, a prince from Angkor named Fa Ngum founded the Theravada Buddhist kingdom of Lan Xang (meaning 'a million elephants'). As Angkor lost its power, Lan Xang came to dominate modern-day Laos, much of north-eastern Thailand and even parts of southern China and north-western Vietnam. In the seventeenth century, Lan Xang reached the height of its power. European visitors were impressed by its prosperity and its great temples. But when its king died in 1694 without an heir to the throne, Lan Xang broke up into rival kingdoms that came under the influence of its more powerful neighbours — Vietnam, Thailand and Burma.

Vietnam after the fall of Angkor

During the early fifteenth century, China regained control of Vietnam until the Vietnamese secured their independence in a rebellion in 1428. Vietnam played no role in the decline of Angkor but it benefited by expanding into territory that had been part of the Khmer Empire. This is because much of Vietnam is mountainous and it needed more farming land. It also took territory from Champa.

8.10.2 Cambodia from the sixteenth century

In the sixteenth century, Europeans sought wealth from the South-East Asian spice trade but had little impact until the mid-eighteenth century. After Ayutthaya's attack in 1593, Khmer rulers sought Spanish help, which led to a brief period of Spanish influence before the Spanish were massacred in 1599. During the seventeenth and early eighteenth centuries, Cambodia's rulers turned to the Thais and then to the

Vietnamese for support, strengthening both Thailand and Vietnam at Cambodia's expense. Thailand extended its territory into Cambodia but lost these areas as European colonisers moved in during the nineteenth century.

The colonial era and the present

Colonisation by European powers brought many changes to South-East Asia. Only Thailand remained independent. Portugal's capture of Malacca (in modern-day Malaysia) in 1511 and Spain's colonisation of the Philippines were followed by Dutch, British and French empire-building in the region. The Dutch came to control most of modern Indonesia, the British took Burma and Malaya, and the French took Vietnam, Laos and Cambodia in the nineteenth century. The French met strong resistance in Vietnam, but when France declared a **protectorate** over Cambodia in 1862, it had the approval of the Cambodian king, who feared losing more territory to Thailand and Vietnam.

The Khmer prince Norodom Sihanouk declared Cambodia's independence in 1953 but Cambodia was to suffer terribly when it was caught up in the Vietnam War in the 1960s and 1970s. It then suffered even more under the secretive Khmer Rouge regime from 1975 to 1979. The Khmer Rouge called the first year of their rule Year Zero. Through forced evacuation of the cities, forced labour and mass murder, they tried to wipe out all traces of the past.

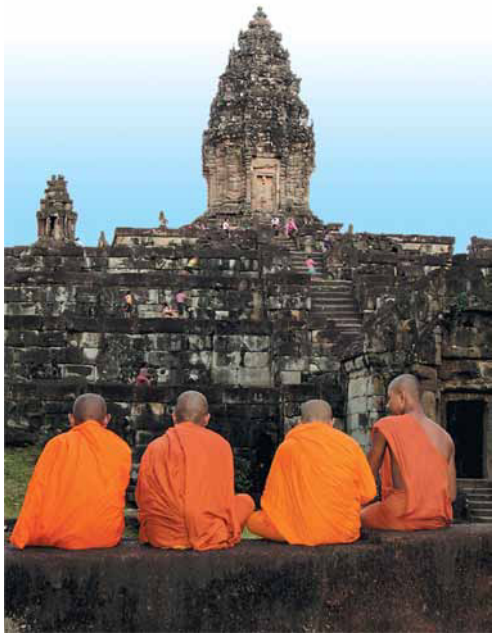
Today, Cambodia is a very poor country. In some ways its distant past continues to shape its present. After years of civil war, Cambodia has returned to its traditional monarchy and once again Theravada Buddhism is its state religion.

Angkor rediscovered

Angkor Wat continued to be visited by Buddhist pilgrims after the city was abandoned in the fifteenth century, but the rest of the city was overtaken by the jungle. Gigantic tree roots spread over the temples, which became hidden as they were cloaked by the encroaching forest. However, in the nineteenth century, French archaeologists began the process of rediscovering Angkor, clearing the jungle from temples and restoring the site by repairing foundations and making drains to prevent further damage from water. Since the 1990s, conservation work has been coordinated by UNESCO and government bodies from France, Japan and Cambodia.

SOURCE 3 An Angkor temple overgrown with tree roots

SOURCE 4 Buddhist monks look on as visitors explore the ruins of Angkor.



SkillBuilder discussion

Using historical sources

1. Many tourists visit Angkor. What evidence remains to give them clues about the Khmer Empire?
2. What damage has been done to Angkor and its temples over the years?

SOURCE 5 Tourists visiting Angkor

8.10 SkillBuilder activity USING HISTORICAL SOURCES

SOURCE 6 A UNESCO World Heritage description of Angkor

Angkor ... is one of the most important archaeological sites of Southeast Asia. It extends over approximately 400 square kilometres and consists of scores of temples, hydraulic structures (basins, dykes, reservoirs, canals) as well as communication routes. For several centuries Angkor was the centre of the Khmer Kingdom. With impressive monuments, several different ancient urban plans and large water reservoirs, the site is a unique concentration of features testifying to an exceptional civilisation. Temples such as Angkor Wat, the Bayon, Preah Khan and Ta Prohm, exemplars of Khmer architecture, are closely linked ... The architecture and layout of the successive capitals bear witness to a high level of social order and ranking within the Khmer Empire. Angkor is therefore a major site exemplifying cultural, religious and symbolic values, as well as containing high architectural, archaeological and artistic significance ...

Criterion (i): The Angkor complex represents the entire range of Khmer art ...

Criterion (ii): The influence of Khmer art as developed at Angkor was a profound [deep] one ...

Criterion (iii): The Khmer Empire of the 9th–14th centuries encompassed much of Southeast Asia and played a formative role in the political and cultural development of the region ...

Integrity

The Angkor complex encompasses all major architectural buildings and hydrological engineering systems from the Khmer period and most of these 'barays' and canals still exist today.

1. Read the text carefully and **discuss** any part you do not fully understand.
2. To **identify** all the reasons why Angkor has many legacies, write one or two sentences under each of the following headings:
   - Size of the Angkor complex
   - Types of structures within the complex
   - Evidence of Angkor's social order
   - Evidence of Khmer art
   - Influence on other South-East Asian societies

8.10 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4, 5	6, 7, 8	9, 10

REMEMBER AND UNDERSTAND

1. **Identify** another written language whose development was influenced by the Khmer written language.
   A. Chinese
   B. Thai
   C. Indian
   D. Mongolian
2. In the years following attacks by Ayutthaya in 1593, **identify** who Khmer rulers turned to for support. **Select** all that apply.
   A. Thais
   B. Spanish
   C. Vietnamese
   D. Dutch
   E. French
3. **Identify** five European powers that gained colonies in South-East Asia between the sixteenth and nineteenth centuries.
   A. Germany
   B. Spain
   C. Italy
   D. Portugal
   E. The Netherlands
   F. France
   G. Russia
   H. Britain
4. **Explain** how Angkor influenced Laos.
5. **Propose** why you think Cambodia's rulers sought help from the Spanish in the sixteenth century and from the French in the nineteenth century.

ANALYSE AND APPLY

6. **Explain** how **SOURCE 1** and **SOURCE 2** provide evidence of the Khmer influence and continuity regarding monarchy, religion and written language in South-East Asia.
7. **SOURCES 4** and **5** show tourists visiting Angkor. **Demonstrate** how this might benefit Cambodia and how large numbers might threaten conservation of the site.
8. **Describe** what you see in **SOURCES 3** and **5**.

EVALUATE AND COMMUNICATE

9. Although Cambodia has been receiving much help with conservation and restoration of several temples, some sites, such as those in **SOURCES 3** and **5**, have been left alone to show the power of nature. **Explain** whether this is a good idea. **Justify** your response.
10. From **examining** each of the sources, draw conclusions about continuity and change in Cambodia since the time of the Khmer Empire.

Answers and sample responses for this topic are available online.

LESSON 8.11 Inquiry: Contested histories

LEARNING INTENTION

By the end of this lesson you should be able to **describe** different perspectives and interpretations of the past.

Investigating the role of climate change in the fall of Angkor

Did climate change contribute to Angkor's fall? Today we know a lot about climate change because we live in a time when human-caused climate change is threatening to make much of our planet uninhabitable. One hypothesis suggests that a different kind of climate change may have caused a shortage of water in the Khmer Empire during the 'Little Ice Age' of the fourteenth and fifteenth centuries.

As we have seen in lesson 8.9, several factors could have contributed to Angkor's weakening from the mid-thirteenth century. These include the formation of the Tai Kingdom of Sukhothai in 1238, conflict within the Khmer royal family, religious changes leading to the introduction of Theravada Buddhism under King Srindravarman (1295–1309), environmental damage due to over-clearing, further Tai attacks by the Kingdom of Ayutthaya, and prolonged droughts and floods during the fourteenth and fifteenth centuries, leading to the abandonment of Angkor following the Tai sacking of the city in 1431.

Your task is to investigate the part played by climate change.

Reading **SOURCE 2** and others you can find through research will enable you to compare some different judgements that have been made. You can use the internet and your library to find relevant secondary sources.

SOURCE 1 This was once a part of a large water reservoir at Angkor Wat.

SOURCE 2 From *Climate as a contributing factor in the demise of Angkor, Cambodia*, Proceedings of the National Academy of Sciences, 2010

Angkor, the capitol of the Khmer Empire in Cambodia, experienced decades-long drought interspersed with intense monsoons in the fourteenth and fifteenth centuries that, in combination with other factors, contributed to its eventual demise. The climatic evidence comes from ... tropical southern Vietnamese tree rings. The Angkor droughts were of a duration and severity that would have impacted the sprawling city's water supply and agricultural productivity, while high-magnitude monsoon years damaged its water control infrastructure ...

Historians and archaeologists have, with a few notable exceptions, only rarely considered the role played by environment and climate in the history of Angkor. However, several studies have now documented the role of regional climate variation in contributing to the eventual demise of other complex agrarian societies. ...

The Khmer kingdom at Angkor ... was as a society dependent on the annual monsoon flooding of Cambodia's lowlands to support a vast and complex agricultural system ... Angkor would have been vulnerable to variability in the strength and intensity of the monsoon at time scales of years to decades.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching

Write your inquiry question. It could be based on anything like the following:

- What is the evidence for a significant role of climate change in the fall of Angkor?
- Would climate change have added to the environmental damage from excessive land clearing?
- Would such damage have been so bad without the attacks by the Tais from the thirteenth to the fifteenth centuries?
- What views on this issue have been expressed by historians and archaeologists?

Research your question.

Step 2: Using historical sources

Analyse your sources.

Step 3: Historical perspectives and interpretations

Evaluate the arguments in the sources.

Step 4: Communicating

What is your answer to your inquiry question? Present your findings in a format of your choosing. Support your answer with examples from your research, analysis and evaluation.

Complete your self-assessment using the **Inquiry rubric** or access the 8.11 exercise set to complete it online.

LESSON 8.12 Review

8.12.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

8.2 How do we know about Angkor and the Khmer Empire?

- Legends of the rise of South-East Asian states are unreliable.
- Inscriptions provide our only written primary sources from the Khmers.
- Written primary sources from other societies that had contact with the Khmers provide more information.
- Khmer archaeological sources provide much evidence.

8.3 How much did geography influence Khmer civilisation?

- The geographical features of South-East Asia provided conditions necessary for the rise of civilisations along rivers, including Angkor and the Khmer Empire.
- There were many different peoples and cultures in the region.

8.4 What was the historical setting?

- Several states arose in mainland South-East Asia between the first century and the twelfth century.
- There were contacts and conflicts between the South-East Asian states.
- The expansion of the Khmer Empire was aided by conflicts between rival states.

8.5 How did the Khmer create an empire?

- Jayavarman II founded the Khmer kingdom in 802 and built Hindu temples.
- Under his successors, reservoirs were built in the Angkor area and the Khmers began to have conflicts with Champa.
- Angkor Wat was built under Suryavarman II.
- Jayavarman VII defeated the Chams, introduced Mahayana Buddhism, built Angkor Thom and expanded the Khmer Empire to its largest extent. He is regarded as the greatest of the Khmer kings.

8.6 How did religions influence the Khmer Empire?

- Animism, Hinduism and Buddhism all played a part in shaping the beliefs and values of the Khmers.
- Khmer culture was strongly influenced by the art, architecture and literature of Hinduism and Buddhism from India and Sri Lanka, but the styles were changed when the Khmers adopted them.

8.7 What was life like in the Khmer Empire?

- Khmer society was very unequal, with kings and nobles having great power.
- Khmer women carried out a huge range of trades and many became dancers.
- The ordinary people provided the food surplus that supported the ruling classes. They also provided soldiers for wars and labour for building reservoirs and temples.

8.8 Why are Angkor's buildings famous?

- The city of Angkor had a million people grouped around it in the twelfth and thirteenth centuries.
- Angkor Wat is the world's largest religious structure.
- Angkor Thom's Bayon Temple has over 11 000 carved figures with scenes of war and everyday life.

8.9 Why did Angkor and Khmer Empire decline?

- After the death of Jayavarman VII, temple-building ceased and the Khmers lost territory.
- There are several factors that could have contributed to Angkor's decline and fall. They include environmental damage, climate change, religious changes and attacks by the Tais.

8.10 What are the legacies of the Khmer Empire?

- The Khmer Empire left significant legacies for Cambodia, including Angkor with its temples and other historical sites.
- The Khmer Empire's legacies also include:
  - its historical influence on neighbouring countries through cultural and trade relations
  - its influence on written languages, arts, architecture and social organisation.

8.11 Inquiry: Contested histories

- Historians identify a range of factors contributing to the fall of the Khmer Empire.
- Several recent studies now provide evidence for the role of climate change during the fourteenth and fifteenth centuries.

8.12.2 Key terms

Buddha Siddhartha Gautama, who founded Buddhism in the sixth century BCE
Buddhist to do with Buddhism; a follower of Buddhism
cult a system of religious worship
epic a long story in verse narrating the deeds of its hero
Hindu the most ancient of all the main world religions; originated in India
incarnation the representation of a spirit or quality in a living human
Khmer the Cambodian people
legitimate lawful or proper
linga a phallic symbol that would have originally been a feature of most Hindu temples
Mahayana Buddhism one of the two main forms of Buddhism that influenced mainland South-East Asia
mausoleum a huge tomb
nirvana in Buddhism, the perfect state; free of suffering and desire
nobles the aristocracy; hereditary privileged class
pious devout, very religious
protectorate when stronger states protect and control weaker states
reincarnation being continuously born and reborn in other lives
ruling class kings, nobles and high officials
Sanskrit ancient and sacred language of India
slash and burn agriculture a nomadic form of farming in which people clear part of a forest, grow crops, harvest them and then move on to repeat this in another place
Tai ethnic groups that migrated from southern China into northern mainland South-East Asia from the tenth century
Theravada Buddhism one of the two main forms of Buddhism that influenced mainland South-East Asia
Tonle Sap the largest freshwater lake in South-East Asia
vassal state a state whose ruler acknowledges a foreign ruler as overlord

8.12.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview:

What was life like in the Khmer Empire, what were the key beliefs, significant social values and perspectives and what contributed to change?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

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Post-Test	Online Post-test
eWorkbook	Customisable worksheets for this topic (ewbk-14244) Reflection (ewbk-10710)
Digital document	Key terms glossary (doc-43122)

8.12 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4, 7, 8	3, 5, 6, 11	9, 10, 12

REMEMBER AND UNDERSTAND

1. **Identify** the geographical features around which Angkor and other mainland South-East Asian societies developed.
   A. Rivers, lakes and coasts
   B. Mountains
   C. Dense forests
   D. Dry plains
2. **Identify** the modern country the Angkor civilisation emerged in.
   A. Thailand
   B. India
   C. Vietnam
   D. Cambodia
3. The three people who played significant roles in the rise of the Khmer Empire are:
   A. Jayavarman II, Zhou Daguan and Fa Ngum.
   B. Jayavarman II, Suryavarman II and Jayavarman VII.
   C. Zhou Daguan, Tribhuvanadityvarman and Suryavarman II.
   D. Jayavarman VII, Fa Ngum and Zhou Daguan.
4. The Khmer Empire was mainly influenced by the culture of:
   A. Vietnam.
   B. China.
5. **Identify** the religion that was introduced to Cambodia by Jayavarman VII.
   A. Christianity
   B. Hinduism
   C. Theravada Buddhism
   D. Mahayana Buddhism
6. Angkor influenced the culture of:
   A. India and Sri Lanka.
   B. Thailand and Laos.
   C. Indonesia and the Philippines.
   D. Tibet and Bhutan.
7. In the Khmer Empire, kings were regarded as:
   A. gods.
   B. devils.
   C. dictators.
   D. semi-divine.

8. A *wat* is:
   A. a palace.
   B. a reservoir.
   C. a weapon.
   D. a temple.
9. It is believed that around the twelfth century Angkor had a population of approximately:
   A. 100 000
   B. 300 000
   C. 1 000 000
   D. 2 000 000
10. The main enemies of the Khmers in the period from the tenth century to the thirteenth century were the:
   A. Burmese.
   B. Indians.
   C. Chams.
   D. Tais.

ANALYSE AND APPLY

11. Write an analysis of **SOURCE 1** below based on the following questions.

SOURCE 1 A Khmer sculpture

   a. **Identify** the main details of the sculpture.
   b. **Explain** what type of skilled craftsmen would have produced it.
   c. **Determine** what level of Khmer society would be occupied by the person who ordered the creation of this relief sculpture.
   d. **Explain** how it is similar to other Khmer sculptures you have seen in this topic.
   e. **Suggest** how it is different from those other sculptures.
   f. **Suggest** why it would have been created.
   g. **Explain** why sculptures such as this are very important as evidence of everyday life. (*Hint:* Most Khmer temple sculptures depict scenes of wars and religious myths.)
   h. **Determine** how reliable this sculpture would be as depiction of the everyday lives of Khmer peasants. (Consider whose perspective the sculpture would represent.)

12. Read **SOURCE 2** below.

SOURCE 2 From *A Record of Cambodia: the Land and its people* by Zhou Daguan, who lived at the Khmer court in Angkor in 1296–1297

> Ordinary families have houses but nothing else by way of tables, chairs, jars or buckets. They use an earthenware pot to cook rice in, and make sauce with an earthenware saucepan. For a stove they sink three stones into the ground, and for spoons they use coconut husks.

Write a half- to one-page explanation of why the Chinese diplomat Zhou Daguan is a significant individual in Khmer history. In your response, consider his role in providing the only detailed written account of the Khmer Empire. As well as a general statement about Zhou Daguan's connection with Angkor, you should comment on what things we can discover from his writing (in the sources used in this topic and from **SOURCE 2** above) that we would not otherwise know about Khmer society.

Answers and sample responses for this topic are available online.

9 Japan under the shōguns

LESSON SEQUENCE

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LESSON 9.1 Overview

INQUIRY QUESTION

How has the Japanese way of life and the roles and relationships of different groups changed over time?

Japan is a nation with a rich heritage and culture, and throughout its history, the Japanese islands have influenced the world. Currently, Japan is one of Australia's key trading partners for goods such as electronics and precious materials.

Throughout different periods, Japan has sought to limit external influences. Presently, citizenship is granted primarily to the children of Japanese citizens. This policy has allowed Japan to maintain and develop its distinctive culture and way of life. Today, Japan is recognised for both its traditional arts, including painting and calligraphy, and its modern innovations.

learnon

- **Pre-test**
  Online pre-test
- **eWorkbook**
  Customisable worksheets for this topic
- **Digital document**
  Key terms glossary
- **Video eLesson**
  Japan under the shōguns

794
Emperor's court moves from Nara to Heian-kyō (modern-day Kyoto)

798
Kyomizu-dera (Pure Water Temple) constructed

1180–1185
Genpei War

1252
Great Buddha statue installed at Kamakura

1274 and 1281
Mongol armies unsuccessfully attempt to invade Japan

700 | 800 | 900 | 1000 | 1100 | 1200 | 1300

CE

Heian period 794–1185
Noble Fujiwara family at the height of its political power
Flowering of art and literature, especially poetry
Use of phonetic kana scripts
Rise of samurai military class
The Pillow Book is written by Sei Shonagon
The Tale of Genji is written by Murasaki Shikibu

Kamakura period 1185–1333
Minamoto no Yoritomo becomes shōgun and puts Japan under military control

SkillBuilder

Use the SkillBuilder activities to develop these Historical concepts and skills:

- HISTORICAL QUESTIONS
- CHRONOLOGY
- USING HISTORICAL SOURCES
- CONTINUITY AND CHANGE
- CAUSES AND CONSEQUENCES
- HISTORICAL SIGNIFICANCE
- COMMUNICATING

1397
Kinkaku-ji (Golden Pavilion) built.

1467–77
Onin War

1549
Francis Xavier introduces Christianity to Japan.

Azuchi-Momoyama period 1568–1600
Toyotomi Hideyoshi persecutes Christians.
Increase in foreign trade.

1688–1704
Genroku period brings a flourishing of urban culture

1853
Commodore Perry first visits from the US.

1868
The Tokugawa shogunate is overthrown.
Emperor Meiji is restored to power.

1868–69
Boshin War

1400 | 1500 | 1600 | 1700 | 1800 | 1800 | 2000 CE

Muromachi period 1336–1573
Japan under military control of the Ashikaga shōguns

1467–1568
Age of the warring states

Edo period 1600–1868
Japan under military control of theTokugawa shoguns.
Christians are persecuted.
Society is organised according to principles of *shi-nō-kō-shō.*
Policy of national seclusion isolates Japan from the rest of the world.
Edo is the largest city in the world.

LESSON 9.2 How do we know about Japan under the shōguns?

LEARNING INTENTION

By the end of this lesson you will be able to **identify** different types of historical sources that provide evidence of life during Japan's shōgunate period.

Tune in

The Buddhist temple of Tōdai-ji shown in **SOURCE 1** is one of the largest structures in the world built without nails.

1. **Discuss how you think Japanese builders were able to construct such an impressive building without nails.**
2. **Identify ways in which building technology has changed since then.**

SOURCE 1 The Buddhist temple of Tōdai-ji

9.2.1 What evidence is there?

Japanese museums, temples and shrines preserve many relics that tell us about Japan's past. The most precious items are listed as national treasures. These could be buildings, sculptures, paintings, documents, artefacts or even people.

9.2.2 Architecture

Much can be learned about Japan's past by examining its surviving buildings. The construction techniques, materials and designs provide valuable insights into architecture, technology and the way people lived. Some of the oldest buildings are located in the cities of Nara, Kamakura and Kyoto, which were important governmental centres at various points in Japan's history. These cities also served as religious centres, housing shrines for Japan's ancient **Shintō** faith, and notable **Buddhist** temples and **pagodas**.

The architecture from different periods of Japanese history reveals significant information about those times. For instance, an era marked by the construction of numerous temples indicates the prominence of religion during that period. Conversely, a time characterised by the building of large castles suggests the considerable influence of wealthy families. Additionally, architecture provides clues about the technological advancements of the time. The presence of large wooden structures built without nails demonstrates the high level of craftsmanship among builders of that era.

9.2.3 Cultural legacies

Many examples of Japanese craftmanship survive today and provide a great deal of evidence of life in Japan over the centuries. Paintings often provide detail of the way of life for all classes of people, as well as the clothing they wore and the buildings in which they lived. Many famous events in Japanese history have also been depicted at the time in works of art. Crafts such as **origami**, printmaking and pottery can also give us insights into Japanese life in past centuries.

Japanese artists adopted woodblock printing as early as the eighth century, but woodblock art really flourished from the sixteenth century onwards. The different styles and schools of woodblock art over the next three hundred years provide a great deal of insight into the Japanese way of life. Traditional Japanese sculpture evolved from the production of small clay figures in early eras, to the casting of huge bronze statues from the Classical period onwards. Sculptures were often religious in nature, depicting the different gods that were worshipped at different times. Large bronze sculptures of Buddha indicate the importance of Buddhism in different eras in Japanese history.

SkillBuilder discussion

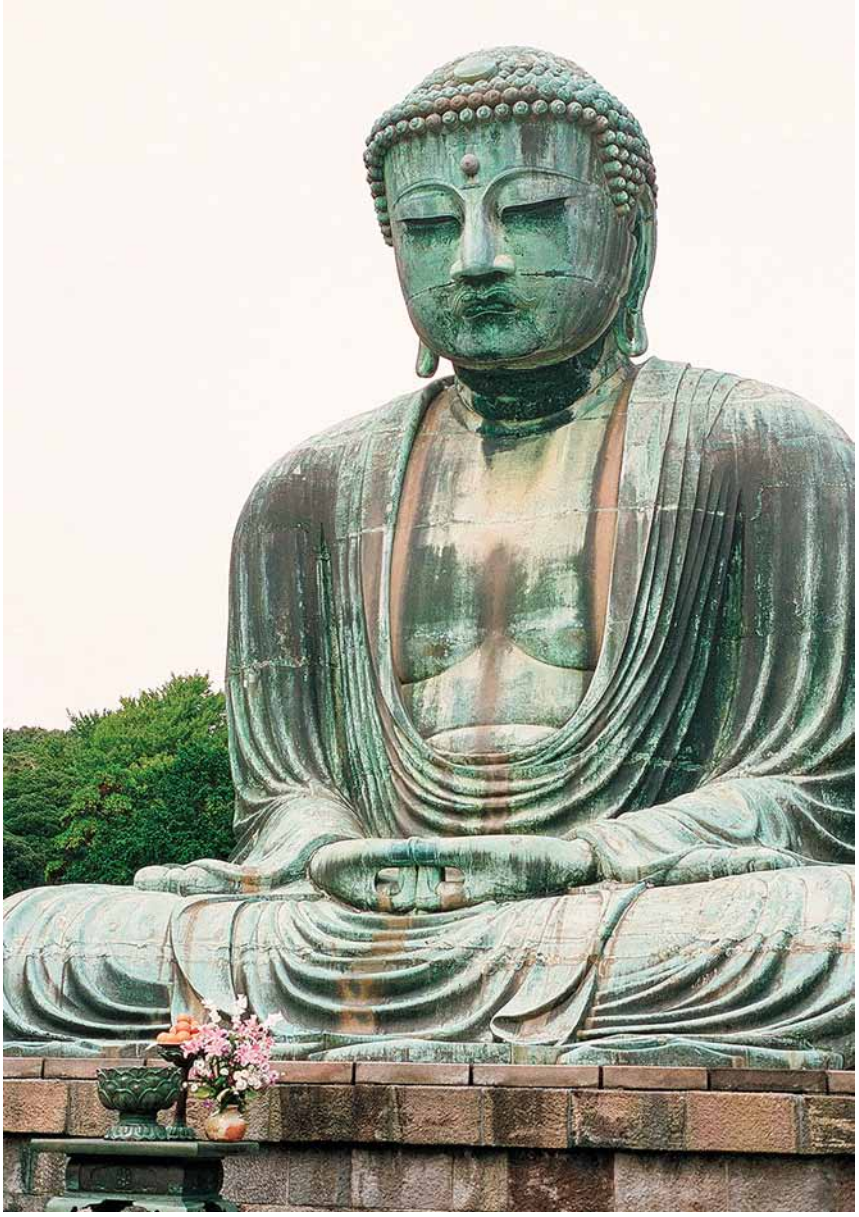
Using historical sources

1. Identify the material and size of the Buddha statue.
2. Discuss what the statue's scale suggests about Buddhism's influence during its construction.
3. How does this statue reflect Japanese craftsmanship of the thirteenth century?

Did you know?

The Japanese language is written with three different sets of characters. These include Chinese characters known as *kanji*, as well as two sets of characters that represent different sounds or syllables. These two sets of characters are known as *hiragana* and *katakana. Hiragana* primarily represents Japanese words and *katakana* is used for foreign words. The use of *katakana* immediately lets the reader know that the word is borrowed from another language.

SOURCE 2 This statue of Buddha is made of bronze and was constructed in the thirteenth century. It is 13.35 metres high and weighs approximately 94 tonnes.



Early Japanese literature, such as Murasaki Shikibu's *The Tale of Genji* written between 1000 and 1010, provide insights into aristocratic life. Besides literary works, numerous historical documents are preserved as national treasures, including letters from emperors and officials, Buddhist and Shintō temple records, and family histories. Notably, the Shimazu family's collection has over 15 000 documents spanning from the eighth to the nineteenth century, offering valuable historical insights.

SOURCE 3 A chapter from the *Lotus Sūtra* from the tenth century. This text, introduced from China, was an extremely important part of Japanese spirituality during this period.

SkillBuilder discussion

Historical significance

1. Look at **SOURCE 4**. Why might the artist have chosen to create this picture almost 700 years after the novel was written?
2. Discuss the symbolic importance of the figure's thoughtful pose. What might it imply about the process of storytelling or writing?
3. What does the inclusion of nature (like the tree and water) tell us about Japanese values during this time?

SOURCE 4 Murasaki Shikibu wrote the first great Japanese novel, *The Tale of Genji*, in early eleventh century. This artwork depicting a scene from the novel was created in 1767.

9.2.4 Tradition

Many traditional festivals and religious ceremonies are still practised in Japan today. Some of these have not changed for many hundreds of years, so they can provide valuable information about the way of life of Japanese people in past centuries.

Many of the festivals are religious in nature and have their origins in ancient and medieval Buddhist and Shintō ceremonies. Others have artistic and cultural significance, such as the re-enactment of traditional Kabuki theatre performances. These can provide insights into the artistic and cultural activities of the past.

SOURCE 5 The Hollyhock Festival (*Aoi Matsuri*) began as a religious festival in the sixth century. It was believed to protect people from disease and help bring good rice harvests.

9.2 SkillBuilder activity HISTORICAL QUESTIONS

Japanese writing and culture have been heavily influenced by China, both during its inception and as it grew. Likewise, our culture relies heavily on the cultures of societies before us.

1. **Investigate** the following cultural expressions and their origins:
   - Christmas, Easter and New Year's Eve
   - Handshakes
   - Birthday presents
   - Ms / Mrs / Mr / Mx
   - Farming cows, pigs and sheep for food (more than other animals)
   - Wearing a tie
2. **Communicate** your findings using either a colourful infographic or a brief oral presentation.

9.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 5	4, 6, 10	7, 8, 9

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statements are True or False.
   a. The two dominant religions that were followed in Japan during the shōgunate period were Shintō and Buddhism.
   b. Japanese woodblock printing was adopted in the eighteenth century.
   c. The Shimazu family collection includes over 15 000 family documents covering over a thousand years, from the eighth century to the nineteenth century.
2. **Identify** three ways that arts and crafts can tell us about life in Japan over the centuries.
   A. Hand puppets were used to provide an accurate picture of fashions through the centuries.
   B. Crafts such as origami and pottery can show us various aspects of the lifestyle of people in the past.
   C. Artworks such as paintings can tell us about the way of life of the people.
   D. Sculpture can tell us of the importance of religion through statues such as the Great Buddha.
3. **Explain** why religious images might have been important in Japanese art.
   A. Religious images were always colourful and therefore important to art.
   B. Reproducing religious images provided constant work for artists.
   C. Without religious images, the artwork was bland.
   D. Religious images were important because religion itself was important in feudal Japanese society.
4. **Explain** what the study of architecture tells us about life in Japan in the past.
5. **Recall** what impressive technology was used in the construction of the Buddhist temple of Tōdai-ji.

ANALYSE AND APPLY

6. **Examine SOURCE 1**. **Explain** what this source can tell us about the importance of religion in traditional Japanese society.
7. **Describe** how works of fiction that are written by people living at that time, such as *The Tale of Genji*, might be useful in historical research.
8. **Analyse SOURCE 2**. The alloy bronze is made up of copper and tin. Casting is a manufacturing process in which a liquid is poured into a mould and then allowed to solidify. Looking at the size of this statue, **state** what conclusions you can draw about the metalworking skills of craftsmen in the thirteenth century.

EVALUATE AND COMMUNICATE

9. **Examine SOURCE 4**. Infer what scene this artwork is portraying.
10. Refer to **SOURCE 5**. The costumes used in the *Aoi Matsuri* procession are copies of garments that no longer exist. **Propose** what historical evidence modern designers could use to find out what the original clothing looked like.

Answers and sample responses for this topic are available online.

LESSON 9.3 What was life like in early Japan?

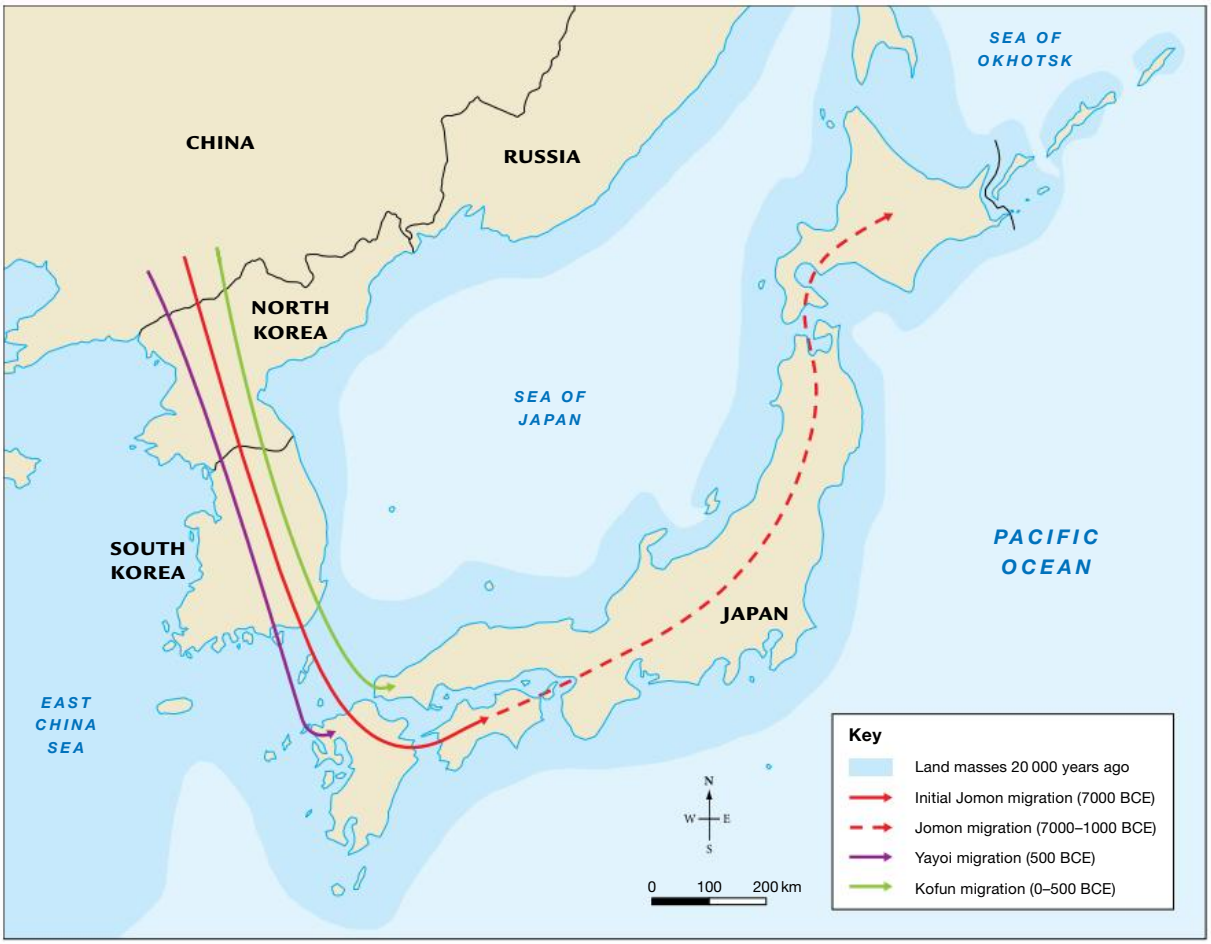
LEARNING INTENTION

By the end of this lesson you should be able to **describe** ancient and Classical Japan and explain the military background of the shōgunate.

Tune in

Thousands of years ago, the sea level around Japan was very different. Nomadic peoples moved across these regions regularly looking for food.

SOURCE 1 A map of Japan as it was settled thousands of years ago. Migration routes are debated, and settlers may have also come from the north.



Source: Map drawn by Spatial Vision.

1. **Explain why you think the people of this period made the decision to settle near the ocean.**
2. **Brainstorm examples of other shore-dwelling civilisations versus those that chose to live away from water. Compare the differences in the ways that they developed.**

9.3.1 Arriving in a new land

About 12 000 years ago, Japan was connected to the Asian mainland by land bridges. Nomadic hunters and fishers, who crossed these bridges, became Japan's first inhabitants. At the end of the last ice age, the climate warmed and rising oceans covered these bridges, forming the Japanese **archipelago**. Later, seafaring peoples from Asia reached Japan by boat. They were attracted by the islands' natural beauty and rich resources. As settlements spread, the original inhabitants were driven into the far north.

The first migrants from South-East Asia settled on Kyūshū. By the fourth century CE, the Yamato clan established the first Japanese state around Nara on Honshū. The Yamato rulers set up a central government based on a legal system and Chinese traditions.

Clans and conquest

Conquering and ruling Japan was challenging for the emperors. Before the Yamato state (c. 250 CE), different ethnic groups had settled various parts of Japan for thousands of years. The Emishi in northern Honshū and the Ainu in northern Honshū and Hokkaidō did not recognise Yamato authority and were conquered by force. The Japanese imperial state relied on strong military support to maintain control over its territory.

The Yamato period marks the start of the 'Classical' period of Japanese history. During this time, the first great works of Japanese literature were written, and Buddhism was firmly established in Japan. Chinese influence was strong: Chinese characters were used in writing, Confucian ideals and religious practices such as Buddhism were shared via trade and contact, and Nara's architecture was modelled on the Chinese capital Xi'an.

SkillBuilder discussion

Historical significance

1. Look closely at **SOURCE 2**. Discuss the importance of Amaterasu coming out of the cave in Japanese mythology.
2. What do you think this artwork, produced in the nineteenth century, communicated to people about Japan?
3. Identify the artistic methods used to depict Amaterasu's emergence.

SOURCE 2 Japanese emperors were believed to be descended from the sun goddess Amaterasu. This nineteenth-century artwork shows her emerging from *Ama-no-Iwato* (Heavenly Rock-Cave Door) after plunging the world into darkness for a time.

Did you know?

The imperial Yamato dynasty claimed descent from Amaterasu, the sun goddess. In Japanese mythology, when the sun goddess hid in a cave, the world was plunged into darkness. Eventually she emerged and a number of her ornaments were changed into human form, one of them becoming the ancestor of the Japanese imperial family.

More areas of Japan gradually came under control of the emperor, but there were struggles for influence in the imperial court. The Buddhist religion became a popular force and Buddhist priests aimed for powerful positions. During this period, the Tōdai-ji Buddhist temple was built at Nara, housing the world's largest bronze Buddha statue, completed in 751 (see **SOURCE 3**). Noble families like the Fujiwara also vied for power, presenting challenges to the emperor's authority. By the eighth century, Nara had grown into a strong urban centre of about 200 000 people, with a taxation system, many roads and bustling commerce. Outside the capital, most people still lived in farming villages.

SOURCE 3 The 15-metre-high Great Buddha of Nara, completed in 751, indicates the influence of Buddhism in the Japanese Classical period.

In the seventh century, there was an attempt at land reform based on a Chinese model. Land was to be distributed to peasant farmers and could not be inherited. Upon the farmer's death, the land would revert to the state for reallocation. This system was gradually abandoned in the eighth century as emperors granted lands to family, friends and loyal officials. Over time, these estates grew, with wealthy nobles gaining great wealth and power, while peasant farmers worked the land and paid taxes to landlords.

Religion and philosophy

Shintō

Shintō, often referred to as Japan's 'native' religion, focuses on cleansing rites for individuals or communities. It is polytheistic, governed by *kami* — supernatural beings with specific characteristics that inhabit all things (see **TABLE 1**).

SOURCE 4 A *torii* gateway and stone *kitsune* (mythical foxes who could shapeshift and held great wisdom). These gateways were found at the entrance to many Shintō shrines and symbolically mark the start of a sacred space.

SkillBuilder discussion

Communicating

1. How is Shintō similar and different to other religions?
2. Are there any key things from religions you are familiar with that are absent or missing in Shintō?

TABLE 1 The characteristics of supernatural beings

Characteristic	Description
Of two minds	When respected, they nurture and love, but when disregarded, they bring destruction and disharmony.
Not visible to humans	They inhabit their own realm and are represented through sacred spaces or natural phenomena.
Mobile	They visit their place of worship but never stay there.
Role-based	Each *kami* has its own purpose or function for the space it is responsible for, and they fall into different categories depending on their role.

The oldest record of *kami* we have is from 927, when there were 3131 recognised *kami*. Today, there are over 8 million.

Buddhism

Buddhism was introduced to Japan via the Silk Road trade with China and Korea. Different forms of this religion arrived at different times and significantly influenced Japanese society's interactions with neighbouring states. During later periods, Buddhism was used in administrative processes. To prevent Christianity from establishing a foothold, citizens needed certain permissions from Buddhist temples to engage in specific community activities. Practising Buddhism helped get these permissions, serving as a method of administration for several hundred years.

Confucianism

Confucianism, though not a religion, has had a significant influence over much of eastern Asia. It is a philosophy introduced to Japan in the third century, encompassing various philosophical movements and teachings. Practised alongside Japan's other major belief systems, these teachings have greatly impacted Japanese societal development and interactions with other cultures. Notably, the **samurai** code of bushidō was heavily influenced by Confucian ideals.

9.3.2 The military state

In 794, Emperor Kammu moved the capital from Nara to Heian-kyō (modern-day Kyoto), marking the start of the nearly 400-year Heian period. During this era, powerful nobles, or daimyō, gained influence by controlling large rural estates, weakening the emperor's authority. To maintain control and defend their lands, daimyō relied on samurai warriors, who became a distinct and influential social class.

The emperors depended heavily on the samurai to suppress rebellious daimyō. Emperor Kammu awarded the title *seii taishōgun* ('barbarian-conquering great general') to Otomo no Otomaro, granting him significant military authority to maintain order. Over time, the shōgun became the de facto military leader, a position requiring loyalty to the emperor and his family.

SOURCE 5 The main gate to Nijō Castle, the palace of the shōgun during the Tokugawa period, shows the power and wealth that the position accumulated.

9.3 SkillBuilder activity HISTORICAL QUESTIONS

Today Japan still has an emperor who is descended from the same Yamato clan that established the first Japanese state.

1. **Conduct research** to find out all you can about the current emperor. Make notes on things like:
   - his role in Japanese society
   - his current powers.
2. **Create** a brief description of the current emperor using the information you found.

9.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 6	4, 5, 10	7, 8, 9

REMEMBER AND UNDERSTAND

1. The first recognised Japanese state was established in the _____ century CE by the _____ clan.
2. **Determine** whether the following statement is True or False.
   One of the major problems faced by the Yamato rulers in maintaining a unified Japanese state was that Japan consists of a number of islands, many very mountainous and difficult to control from one central location.
3. **Determine** which four of the following statements provide evidence that Japan borrowed much of its culture from China.
   A. Buddhism most likely came via China.
   B. The Yamato rulers set up a system of government that was based on Chinese traditions and its legal system.
   C. Japanese writing was based on Chinese characters.
   D. Japanese literature was sent to China for approval prior to printing.
   E. In the capital city, Nara, the architecture was based on that of the Chinese capital, Xi'an.
   F. Japanese writing was based on Chinese characters.
4. **Explain** how the system of land ownership changed during the eighth century.
5. **Recall** how the nobles grew in power at this time.

ANALYSE AND APPLY

6. **Refer** to **SOURCE 1** and an atlas to list the names of Japan's four main islands. **Identify** which island is the largest and which is the smallest.
7. **Propose** a reason why the geography of the Japanese islands would have made it difficult to achieve a unified state with its capital in Nara.
8. **Examine SOURCE 2**. **Describe** how the artist tried to show the power and importance of the sun goddess Amaterasu to the people around her.

EVALUATE AND COMMUNICATE

9. **Analyse SOURCE 3**. Explain how you can tell that Buddhism had become an important religion in Japan by the eighth century.
10. **Evaluate SOURCE 5**, one of many gates in a high wall that surrounded the old imperial palace in Kyoto.
    a. **Explain** why it was necessary to surround the palace with a high wall.
    b. **Suggest** what this gate tells us about the wealth and power of the shōgun.

Answers and sample responses for this topic are available online.

LESSON 9.4 How did the shōguns take control?

LEARNING INTENTION

By the end of this lesson you should be able to

- **outline** how power passed from the emperor to the Kamakura shōgunate
- **explain** the rise of shōgun power
- **describe** the succession of shōgun rule, including the rise of Tokugawa Ieyasu.

Tune in

The emperor, even as an adult, was never involved in physical conflict himself. He always had a group of loyal soldiers nearby to protect him.

1. **Identify four different roles shown in SOURCE 1.**
2. **Explain how clothing, hairstyle and position in the image help you classify these roles.**
3. **Analyse what these roles reveal about the society during the civil war.**

SOURCE 1 This thirteenth-century illustration shows the escape of the Taira clan and their supporters from Kyoto during civil war.

9.4.1 Power struggles

The Heian period (794–1185) in Japanese history was named after the capital Heian-kyō (modern-day Kyoto). This period is considered to be a golden age of classical Japanese culture.

The Heian period saw power struggles between the Fujiwara, Minamoto and Taira clans. The Fujiwara dominated from the seventh to twelfth centuries, controlling key royal court offices and provincial governorships. Emperors often married Fujiwara women, and senior Fujiwara members acted as regents for young emperors, effectively ruling Japan.

In 1068, Emperor Go-Sanjō reduced their influence by appointing Minamoto clan members to some offices. His mother and wife were Minamoto, fostering loyalty to the clan. However, in 1180, Emperor Takakura was forced to abdicate by his Taira relatives, and his 2-year-old son became emperor. The child's Taira mother and relatives assumed control as **regents**.

SOURCE 2 Twelfth-century artwork of Minamoto no Yoritomo, the first shōgun to rule Japan

The Minamoto clan rebelled against the Taira, sparking a **civil war** during the years 1180–85. Minamoto no Yoritomo, leading his clan, was appointed shōgun after the clan captured Kyoto and installed the young Go-Toba as emperor. Yoritomo's rise marks the shift from the Classical period to the shōgunate or feudal era, lasting 700 years. The shōguns and samurai ruled, and Buddhism became the dominant religion.

SkillBuilder discussion

Using historical sources

1. Describe who Minamoto no Yoritomo (**SOURCE 2**) was and his significance in Japanese history.
2. Define the term *shōgun* and explain Yoritomo's role in establishing the shōgunate.
3. Explain how the Minamoto clan overthrew the Taira clan and gained control of Japan.

9.4.2 The rise of the shōgun

The civil war and the broader trends in Japanese society illustrate the shōguns' dominance from 1192 to 1868. The eighth-century estates given to the daimyō brought them significant wealth and power, enabling them to hire samurai for protection. This fostered a warrior class that respected military prowess.

These estates were often remote, limiting the emperor's control and increasing the daimyō's bargaining power. Many emperors, including Emperor Antoku (1180) and Emperor Go-Toba (1183), were infants when they ascended the throne, allowing powerful regents to dominate. This further weakened the emperors' authority.

Leading up to the twelfth century, the emperor's power declined while daimyō clans gained strength. Since the shōgun was the most powerful daimyō, it was inevitable that his power would surpass that of the emperor.

SOURCE 3 A commemorative statue of Tokugawa Ieyasu, the founder of the Tokugawa shōgunate

SOURCE 4 Fourteenth-century Emperor Go-Daigo, holding implements associated with Buddhist worship

SkillBuilder discussion

Historical significance

Look at **SOURCES 3** and **4**. Discuss the significance of each of these rulers. What did each achieve?

9.4.3 Conflict in and around Japan

The Kamakura shōgunate, established in 1192, marked the dominance of the daimyō over the emperor. Stability was fragile, as the shōgun's power depended on the strongest daimyō clans. Sometimes power passed peacefully, but civil wars often broke out between competing families. During this time, the Minamoto, Fujiwara and Hojo clans shared power until the shōgunate collapsed in 1333.

Mongol invasions

China posed a major threat during the Kamakura period. Kublai Khan, the Mongol emperor, demanded Japan submit to his rule. When the shōgunate refused, Kublai Khan launched invasions in 1274 and 1281, but both failed due to typhoons that the Japanese called *kamikaze* (divine winds). While these storms protected Japan, many samurai were left unpaid for their efforts, leading to growing unrest.

SOURCE 5 A Japanese painting showing the destruction of the Mongol invasion fleet by 'divine wind'

The Ashikaga shōgunate

In 1333, Emperor Go-Daigo resisted military rule, with help from the Ashikaga clan. The Kamakura shōgunate collapsed, but the Ashikaga soon turned against the emperor and took control. They ruled for 237 years, a time of artistic growth, including developments in theatre, literature and traditions like the tea ceremony. However, the Ashikaga shōgunate eventually fell into chaos as rival daimyō clans fought for power.

The age of the warring states

For the first hundred years of their rule, the Ashikaga clan stayed in power by forming alliances with daimyō families. They relied on the personal skills of the shōgun to keep this support. In 1464, a dispute between two Ashikaga brothers over who would become shōgun caused a civil war from 1467 to 1477.

This greatly weakened the shōgunate. Over the next century, daimyō clans often fought each other for power, while Ashikaga shōguns became puppets controlled by different clans. During this chaotic time, vassals rebelled, farmers started uprisings and the economy suffered. Japan needed a strong leader to restore peace and order.

SOURCE 6 A battle between rival samurai during the period of the warring states

SkillBuilder discussion

Historical questions

At various times, the Japanese emperors or shōguns were puppets of other powerful figures.

1. What does the term 'puppet' mean in this context?
2. What advantage would there be for one person to use another person as a 'puppet'?

9.4.4 Order on the islands

The Ashikaga shōguns' prolonged rule ended in chaos, later resolved by three powerful unifiers. Oda Nobunaga, the first, used military might to dominate rival daimyō clans. Toyotomi Hideyoshi, the second, ended the warring states period. Tokugawa Ieyasu, the third, established the Tokugawa shōgunate in 1603.

Oda Nobunaga — a ruthless military genius

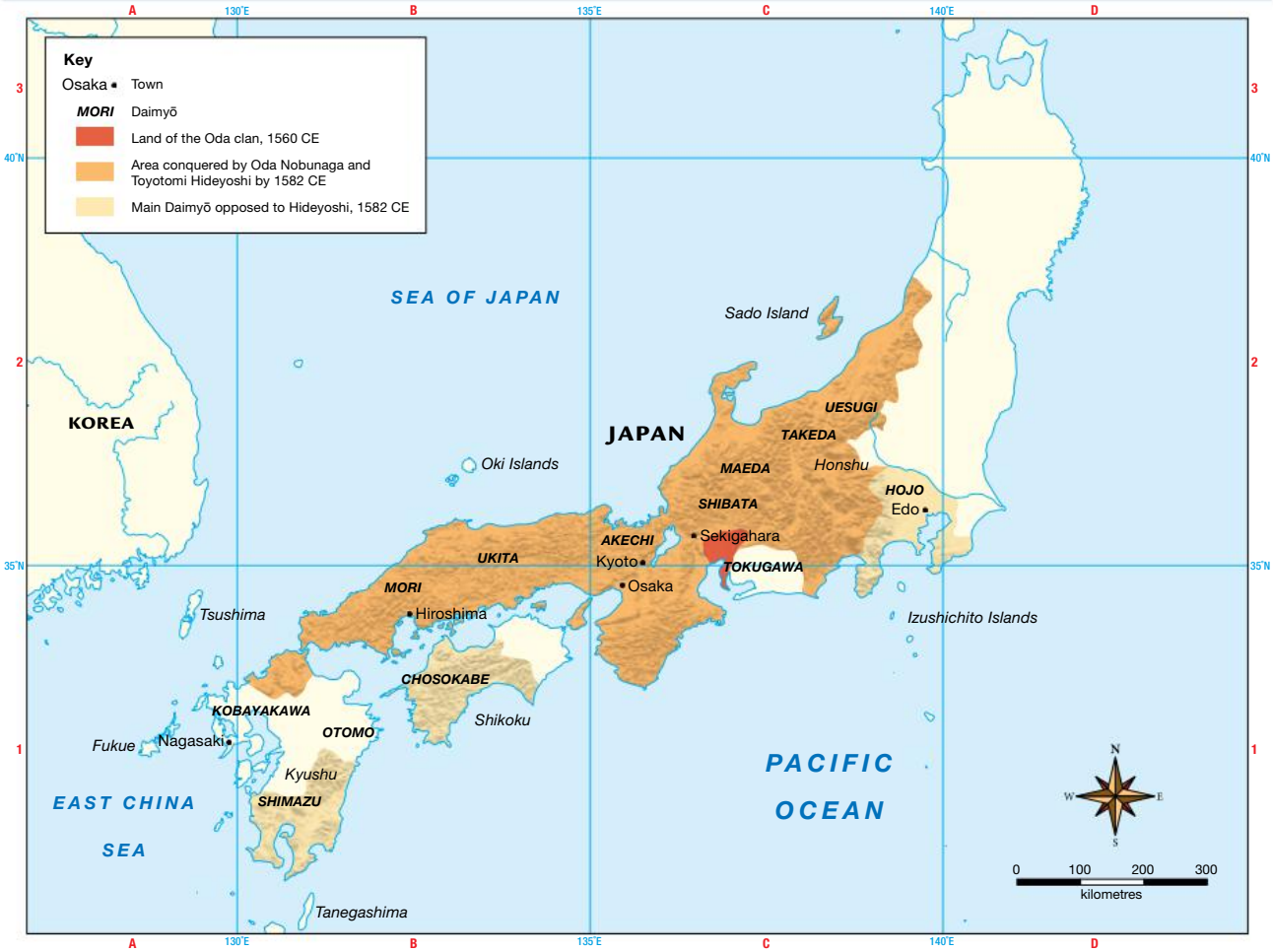
Oda Nobunaga, the son of a minor daimyō from a small **domain** on the coast of Honshū, aimed to unite Japan. After the Ashikaga shōgun Yoshiteru's murder in 1565, Oda placed Yoshiteru's brother Yoshiaki as shōgun, who served mainly as Oda's puppet. In 1573, Yoshiaki's rebellion against Oda failed, leading Yoshiaki to become a monk. The shōgun role remained vacant for 30 years. Oda's ruthless battles **centralised power**, notably crushing Buddhist opponents and using European **muskets**. Oda's reign ended in 1582 with his **seppuku** (death by disembowelment) after he was surrounded by enemies.

Toyotomi Hideyoshi — from soldier to leader

Toyotomi Hideyoshi was a soldier in Oda's army and took over leadership after Oda's ritual suicide. He developed a strong central government that expanded control over the islands of Shikoku and Kyūshū. Hideyoshi also opposed European Christian missionaries. He expelled them from Japan, prohibited Japanese from becoming Christians and later executed 26 Japanese and foreign Christians. Before Hideyoshi died in 1598, he set up a council of five senior elders whom he trusted to pass power to his son.

SOURCE 7 The Twenty-Six Martyrs Monument was built in 1962 in Nagasaki to commemorate the Christians executed by Toyotomi Hideyoshi in 1597.

SOURCE 8 Sixteenth-century Japan



Source: Spatial Vision

Tokugawa Ieyasu — a ruthless leader

Building on the work of Oda Nobunaga and Toyotomi Hideyoshi, Tokugawa Ieyasu unified Japan and took control over daimyō clans. He founded the Tokugawa shōgunate, which ruled Japan until 1867. Born in 1542 as Matsudaira Takechiyo, Ieyasu changed his name several times, becoming Tokugawa Ieyasu in 1567 and claiming descent from the Minamoto clan. He fought alongside Oda Nobunaga in many battles and, after Oda's death in 1582, took control of several provinces. In 1600, Ieyasu won a key military victory and declared himself shōgun in 1603.

Ieyasu made Edo, a small fishing town, the centre of his shōgunate. He expanded a small castle there into a huge residence and military base. Edo grew quickly as Japan's administrative centre, attracting samurai, merchants and artisans, eventually becoming the world's largest city by the 1700s.

SkillBuilder discussion

Historical significance

1. Who were the Ikkō-ikki rebels that Tokugawa Ieyasu fought against?
2. What is the significance of the Battle of Batō-ga-hara in Japanese history?
3. Why was Tokugawa Ieyasu important in unifying Japan?

SOURCE 9 A depiction of the Battle of Batō-ga-hara, when Tokugawa Ieyasu fought against Ikkō-ikki rebels

Law and order

The Tokugawa shōguns came to power after a long civil war and worked to limit the power of rival daimyō clans. To control them, the shōguns required daimyō to travel to Edo every second year, to show loyalty. These trips were grand, with samurai escorts and palanquins, but costly. To return home, the daimyō had to leave their families in Edo as hostages. The high costs of travel, maintaining a home in Edo and giving gifts to the shōgun kept the daimyō from becoming too wealthy or powerful. Long processions of samurai accompanying daimyō in palanquins became a common sight.

9.4.5 Looking inwards

The Tokugawa shōguns were highly suspicious of people and ideas from overseas and aimed to protect Japan's traditions. Christianity was banned as 'un-Japanese', and citizens were forbidden from travelling overseas. For over 260 years, the shōguns isolated Japan from the world.

They also tightly controlled international trade. Only Dutch, Korean and Chinese traders were allowed to trade, while others, like the Spanish and Portuguese, were banned. Trade was restricted to the port of Nagasaki, and goods were strictly monitored. Merchants had to pay fees and taxes for the right to trade, and the shōgunate owned most Japanese trading ships, granting permits only to selected merchants to operate them.

Why did the shōguns control trade?

Why did the Tokugawa shōguns choose to maintain such tight control over trade? The following may provide some clues.

- Controlling trade helped maintain isolation from foreign influences. Other daimyō were excluded from overseas trade to prevent them from gaining wealth and challenging the shōgun's power.
- Nagasaki, controlled by the Tokugawa clan, was the only city where trade was allowed. Fees and taxes from trade went to the Tokugawa family, maintaining the shōgun's wealth and power.
- Any foreign trade that did take place was profitable. The shōgunate monopolised many goods and charged fees and taxes to merchants who were granted the right to trade.
- Copper and silver were major exports. By controlling trade, the shōguns limited the export of these metals, ensuring Japan maintained valuable metal stocks.

TABLE 1 Classical and feudal Japan

Dates	Period	Power held by	Other features
Fourth century to 794	Nara	Yamato clan emperors	The imperial dynasty was established, along with the first central government of Japan.
794–1185	Heian	Emperors	Capital city was moved to Heian-kyō (Kyoto); the first shōguns were appointed; daimyō and samurai gained power.
1185–1333	Kamakura	Kamakura shōguns	There was a stable government for 150 years; the Mongols were successfully defeated.
1336–1573	Ashikaga	Ashikaga shōguns	The shōgunate broke down gradually as daimyō fought for power during the age of the warring states.
1573–1603	Warring states	Oda Nobunaga; Toyotomi Hideyoshi; Tokugawa Ieyasu	Shōgunate rule broke down; government was centralised under the 'three great unifiers'.
1603–1867	Edo	Tokugawa shōguns	The capital was moved to Edo (Tokyo); government was stable under the shōgunate; Japan was isolated from the rest of the world.

SOURCE 10 From the Closed Country Edict of 1635

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.
4. If there is any place where the teachings of the [Catholic] priests is practised . . . you must order a thorough investigation.
5. Any informer revealing the whereabouts of the followers of the priests must be rewarded accordingly. If anyone reveals the whereabouts of a high ranking priest, he must be given one hundred pieces of silver. For those of lower ranks, depending on the deed, the reward must be set accordingly.
6. If there are any Southern Barbarians who propagate the teachings of the priests, or otherwise commit crimes, they may be incarcerated in the prison.
7. All incoming ships must be carefully searched for the followers of the priests.
8. No single trading city shall be permitted to purchase all the merchandise brought by foreign ships.
9. Samurai are not permitted to purchase any goods originating from foreign ships directly from Chinese merchants in Nagasaki.

9.4 SkillBuilder activity HISTORICAL SIGNIFICANCE

The Tokugawa shōgunate largely cut Japan off from the rest of the world for over 250 years. To achieve this, it passed the Closed Country Edict in 1635, which declared that any Japanese who attempted to travel overseas or any who returned after living overseas would be put to death.

In small groups **discuss** whether or not you agree with this action. You need to bear in mind:

- the desire to keep out foreign ideas, which the shōguns feared would undermine the traditional Japanese way of life
- the Tokugawa shōgunate was a period of great peace, prosperity and the flourishing of art and culture in Japan.

9.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 7, 10	6, 8, 9

REMEMBER AND UNDERSTAND

1. **Identify** the three powerful clans that were competing for influence during the Heian period.
   A. The Daimyō
   B. The Taira
   C. The Minamoto
   D. The Fujiwara
   E. The Batogahara
2. **Determine** what role Japanese emperors had after 1192.
   A. A role in the judiciary
   B. Leader of the armies in battle
   C. Ambassador to China
   D. A purely religious and ceremonial role
3. **Determine** whether the following statement is True or False.
   The Taira clan was ultimately successful following the period of civil war between 1180 and 1185.
4. **Explain** how the appointment of Yoritomo as shōgun dramatically changed the power balance in Japan.
5. **Recall** why Japanese emperors were so dependent on regents during the period from 1180 to 1185.

ANALYSE AND APPLY

6. **Examine SOURCE 1**.
   a. **Identify** the different groups of Japanese society seen in the source.
   b. **Explain** what this source tells us about the power of the emperor during the period of the civil war.
7. **Examine** the portrait of Yoritomo in **SOURCE 2**. **Identify** two possible characteristics that suggest he had the ability to win the loyalty of the daimyō and samurai, and thus gain supreme power in Japan.
8. **Compare SOURCES 3** and **4**.
   a. **Identify** what each source tells us about the different roles of the shōgun and the emperor during the period of shōgunate rule.
   b. **Explain** whether the shōgun or the emperor looks more likely to be able to rule the country. Give reasons for your answer.

EVALUATE AND COMMUNICATE

9. **SOURCE 5** shows the destruction of the Mongol invasion fleet in 1281. **Determine** what appears to be the cause of the Mongol defeat.
10. **Summarise** why the appointment of Yoritomo as shōgun is considered a major turning point in Japanese history.

Answers and sample responses for this topic are available online.

LESSON 9.5 How did Japanese society organise itself?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** the hierarchical structure of Japanese feudal society.

Tune in

Today Japan still has an emperor who is descended from the same Yamato clan that established the first Japanese state.

SOURCE 1 Emperor Naruhito attending a ceremony in 2019 to proclaim his enthronement to the world, called Sokuirei-Seiden-no-gi

1. **Discuss the role of an emperor in the twenty-first century.**
2. **Do you think countries still need royal figureheads? Discuss any advantages and disadvantages as a class.**

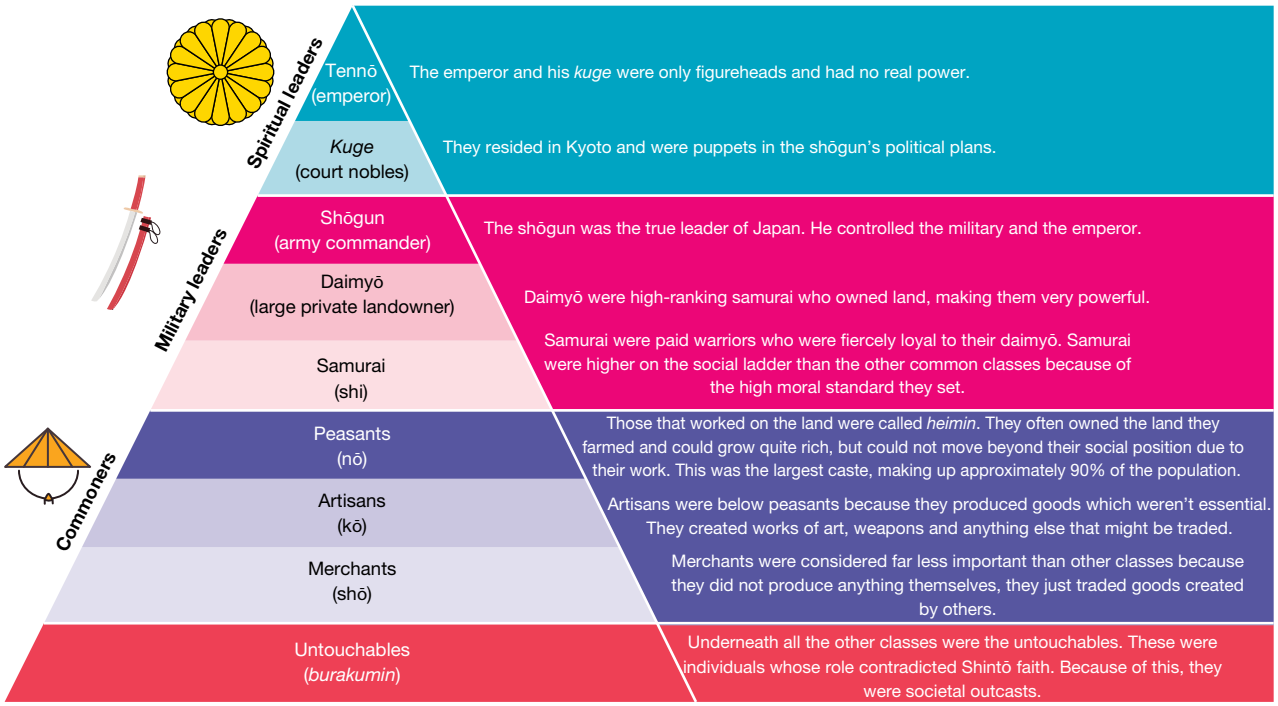
9.5.1 The feudal system

For about a thousand years, from the Heian period until the end of the Tokugawa shōgunate in 1867, Japan maintained a feudal society similar to medieval Europe. On average, women lived only 27 and men 32 years. Diseases like **tuberculosis** and **beriberi** were common, with women facing added risks during childbirth. Many children died young due to poor diets, unsanitary conditions and diseases.

The emperor held the highest status and, although having little actual power during the shōgunate period, was an important religious leader believed to be a descendant of the sun goddess. Despite his high status, he needed the support of the daimyō, powerful nobles who controlled distant regions in exchange for land.

The most powerful daimyō became the shōgun, the effective ruler of Japan. The shōgun managed the army and routine governance. During different periods, shōguns faced challenges from powerful daimyō, but the Tokugawa shōguns eventually brought them under control. The daimyō built massive, fortified castles to protect themselves.

SOURCE 2 The social hierarchy of *shi-nō-kō-shō*, introduced by the Tokugawa Shōgunate



SkillBuilder discussion

Continuity and change

1. Study **SOURCE 2**. What role did the daimyō play in the feudal hierarchy of Japan during the Tokugawa Shōgunate?
2. Suggest how the social hierarchy of *shi-nō-kō-shō* influenced the daily lives and occupations of commoners in feudal Japan.
3. What challenges might have been faced by the shōguns in maintaining control over the powerful daimyō?

Commoners were divided into social castes called *shi-nō-kō-shō*, based on Confucian teachings from China. These classes were hereditary, and individuals remained in their assigned class for life. The highest caste was the samurai warriors, followed by those who provided food and raw materials (*heimin*), those who produced non-essential goods and, finally, those who only sold or traded goods.

Outside of this set of castes were the *burakumin*, or untouchables. These were roles such as executioners or butchers — anyone who did a job which was tainted by death and therefore an affront to the Shintō faith.

SOURCE 3 Himeji Castle belonged to the daimyō from the Akamatsu clan.

9.5.2 The role of women

As in many feudal societies, women in important families had little power in Classical Japan. It was a very male-dominated society, with women often having control taken from them. There may have been up to eight empresses who ruled without a husband, but it was the exception rather than a common occurrence.

However, women of lower classes were far more able to take an active role in the family business and make choices alongside men.

Marriages were usually arranged between families. Husbands often had more than one wife and lived with a wife's family, although this custom later changed when wives moved to their husband's family.

SOURCE 4 *Women Looking at the Maple Trees at Takao, near Kyoto*. Illustration by Kano Hideyori (Muromachi period, sixteenth century).

Girls from rich families spent many hours copying famous poetry and practising handwriting. In this way, they learned to read and write the Japanese characters called **kana** at home. Beautiful writing was a mark of good taste and high social class. Boys went on to study the Chinese characters, but such learning was discouraged for girls. The vast majority of people (60 per cent of men and over 80 per cent of women) were illiterate.

SkillBuilder discussion

Historical significance

1. What was the significance of heavy makeup for Japanese noblewomen?
2. What would you expect the makeup was made from? Think about the white, red and black colours.

SOURCE 5 Japanese noblewomen often wore heavy makeup and elaborate clothing.

Much of what we know about women from this period is due to Sei Shonagon, the author of *The Pillow Book* and a lady-in-waiting to Empress Teishi in the middle Heian period, c. 1000. Sei's book provides fascinating insights into Japanese life over a thousand years ago, particularly the role of women in Japan under the shōguns.

Sei Shonagon's description of Empress Teishi playing the ***biwa***, a stringed instrument like a lute, can tell us much about court life at the time (see **SOURCES 6** and **7**). Empress Teishi died at the age of 25 in 1001 after giving birth to her second child.

Other women described in *The Pillow Book* include:

- farming women planting the rice fields and 'wearing hats that look just like newly made serving trays'. They are singing a song about a bird, saying 'it's your chanting sets us planting!'
- ladies-in-waiting, who spend their time writing poetry, playing music and indulging in witty conversation
- fisher girls with thin ropes tied to their waists diving out of boats to collect shellfish. Sei criticised the men who were singing and moving the boat while the women were gasping for breath
- **shaman** chanting and praying to the spirits for a child's health. During the shōgunate period, the Japanese believed that bad health was due to evil spirits possessing a person's body
- an old Buddhist nun 'dressed in horribly grimy clothes and looking like a little monkey'. She begs for offerings and shocks the ladies-in-waiting by singing a rude song
- a serving lady pouring water for the empress. Other female servants act as hairdressers, food preparers or nurses to the emperor's children.

SOURCE 6 The Japanese *biwa* was first developed in the eighth century. It derives from similar instruments found in Asia and the Middle East and is still played today.

SOURCE 7 An extract from *The Pillow Book*

There she sat, in a scarlet robe with quite indescribably lovely gowns and starched robes beneath, in layer upon layer ... the sharp contrast of her wonderfully white forehead, clearly visible at the side of the shielding instrument.

Geisha culture

The term 'geisha' means 'art person'. In Japan, geishas are performing artists who entertain clients with various artistic skills. Their role, which emerged in the eighteenth century, involved being talented artists and conversationalists.

Although some western scholars equated the geisha profession with prostitution, geishas were more accurately professional entertainers and independent businesswomen. Women managed the geisha houses and finances. Geishas traditionally did not marry and often entertained into their 70s and 80s. If a geisha married, she had to leave the geisha house. The refined culture of geishas, which developed during the Edo period, still exists in Japan today.

SOURCE 8 Practices such as the tea ceremony were an incredibly important part of a geisha's role entertaining her clients.

9.5 SkillBuilder activity HISTORICAL QUESTIONS

In the study of history, women are often left out of important accounts.

1. Pick another culture which interests you (you may like to look at the topic lists in this resource) and **research** women of that region. **Explain** whether they were similar or different to the women of Shōgunate Japan. **Identify** whether they had more rights or were recognised in historical writings.
2. **Communicate** your findings in a couple of paragraphs.

9.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 7, 9	6, 8, 10

REMEMBER AND UNDERSTAND

1. **Recall** the role of the emperor in Japanese feudal society.
   A. An important religious and symbolic figure without real political power
   B. An important religious and symbolic figure with great political power
   C. An important political power without any religious or symbolic relevance
   D. An important political power with a small amount of religious significance
2. **Determine** whether the following statements are True or False.
   a. Each of the daimyō had their own lands, given to them by the emperor in return for their loyalty, and an army, which made them very powerful people.
   b. Geishas in Japan have traditionally been considered professional entertainers and independent businesswomen.
   c. Beautiful writing was highly regarded, which contributed to the high literacy rates during this time.
3. Complete the following passage.
   The samurai were paid by the _____ to control their domains, and each samurai swore an oath of loyalty to his own daimyō. As well as fighting for the daimyō during conflicts with other nobles, the samurai often ran the _____, collected taxes and kept order among the peasants. During the period of the _____ states, the daimyō relied on their samurai to protect them and their interests.
4. **Explain** why farmers ranked higher than artisans or merchants in the *shi-nō-kō-shō* arrangement of social classes.
5. Women in modern times have far more control over their lives than those in feudal Japan. **Explain** what you think brought about this change.

ANALYSE AND APPLY

6. **Reflect on** what you have learned so far. From an examination of the structure of Japanese feudalism, explain which human qualities and skills were most highly valued in this society. **Explain** which human qualities and skills were considered to be the least important.
7. Japanese feudal society lasted for over a thousand years, from the Heian period until the mid-nineteenth century. **Identify** two features of the society that allowed it to continue for such a long time.
8. **Identify** the positive aspects of Japanese feudal society. **Identify** its negative aspects. **Create** two lists, one showing what you believe were the positive features of this society and one to show the negative features.

EVALUATE AND COMMUNICATE

9. Refer to **SOURCE 8** and **evaluate** the importance of the role of the geisha to Japanese society.
10. **Evaluate** to what extent the life of the geisha was an unusual feature of a society that was otherwise very male-dominated.

Answers and sample responses for this topic are available online.

LESSON 9.6 Who were the samurai?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** the lifestyle, philosophies and conduct of the samurai class during the shōgunate period.

Tune in

Samurai armour was designed to be intimidating to opponents. It varied greatly during the shōgunate period, which lasted nearly 1000 years.

SOURCE 1 Samurai armour from the time of the Mongol invasions (thirteenth century)

1. **What are your thoughts on the armour in SOURCE 1? Would you find something like that intimidating if it was charging towards you in battle?**
2. **Discuss why you think the making of traditional samurai weapons and armour is held in such high regard by people from all around the world.**

9.6.1 The role of a samurai

The respect for warriors in Japan increased from the Heian period and grew further during feudal times when society was structured around military power. Daimyō were influential warlords whose power relied on the combat skills of the samurai, who pledged loyalty to them.

Samurai pay varied based on their success and experience. New recruits received basic amounts of money — just enough to live on — and were often assigned guard duties. Experienced samurai held significant influence over their lords and served as trusted advisors. However, they were not permitted to own land, since having independent income could compromise their loyalty to the daimyō.

SkillBuilder discussion

Using historical sources

1. What are the main features of the samurai armour from the Tokugawa shōgunate?
2. How did the design of the armour reflect the needs and priorities of samurai warriors during the Tokugawa period?
3. In what ways did the samurai armour from the Tokugawa shōgunate differ from the armour used in earlier periods?

SOURCE 2 This samurai armour is from the Tokugawa shōgunate.

The term *samurai* means 'those who serve'. Samurai were more than warriors; they were dedicated attendants to their daimyō lord, following a strict code of conduct and routine. Samurai were paid by the daimyō to control their lands, swearing an oath of loyalty in return. Beyond fighting in conflicts, they managed estates, collected taxes and maintained order among peasants. During the warring states period, the daimyō depended heavily on their samurai for protection and to secure their interests.

Samurai boys were raised to become professional soldiers. Shortly after birth, they were given a small sword in a special ceremony, symbolising their future role. Samurai women were also expected to embody courage and honour, though their education focused on becoming loyal wives and mothers. They were trained to manage households and take charge during their husbands' absence in wartime, ensuring everything was kept in order until their return.

SOURCE 3 A *tachi* (top) from the Kamakura period with its *koshirae* (a type of housing for when the sword was worn by a samurai). These ornaments could change depending on the function needed by the warrior.

Ronin

If a daimyō lost his land in battle or had his domain confiscated by the government, his samurai became masterless. They were called **ronin** or 'wave men', floating on the sea of life. At various times in history, Japanese society had many of these unemployed warriors. Some of them simply ran away to begin a new life. Others joined new commanders or became farmers. But some *ronin* became bandits or mercenary soldiers who terrorised the countryside.

Did you know?

A famous *ronin* named Musashi fought over 60 duels and was never defeated. He began his samurai training at the age of 7 and had his first duel when he was 13. As an adult, Musashi wrote *The Book of Five Rings* to explain his unique fighting methods.

9.6.2 Bushidō

Samurai followed Buddhist teachings to stay calm and focused in battle. They practised meditation to act without hesitation.

In 1616, the term **bushidō**, meaning 'the way of the warrior', was invented to describe the samurai's balanced life of wisdom and strength. From a young age, boys learned archery, horse riding, sword fighting and unarmed combat. They were taught by their fathers, other samurai or in martial arts schools. Samurai also had to read and write to help their lords manage their lands. Their main duties were often called 'the pen and the sword'.

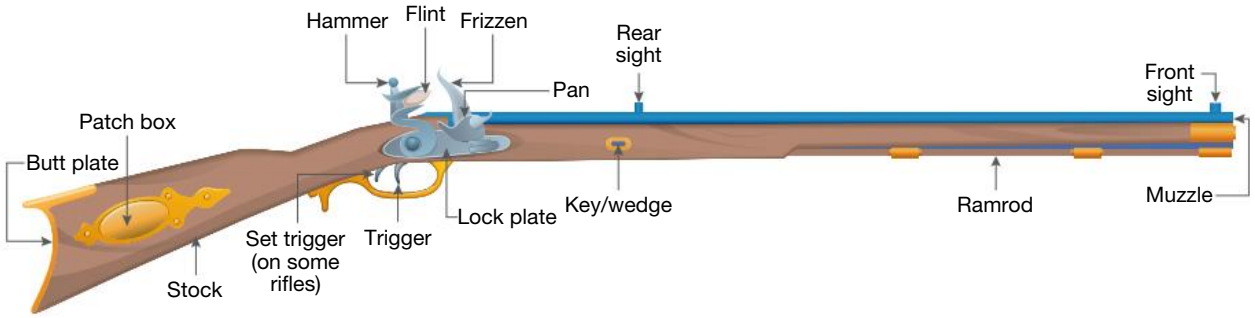
9.6.3 New technologies

In Japan, samurai disappeared for some of the same reasons that knights disappeared in Europe. When flintlock guns were introduced to Japan in the sixteenth century, they became popular quickly. Samurai learned to use guns, but this meant traditional skills like sword fighting were less important. From the seventeenth century, Japan had over 250 years of peace, so samurai didn't need to fight. Instead, they became government officials. Samurai also fell into debt with merchants, which weakened their social standing. The samurai class was abolished in the late nineteenth century.

How the flintlock gun works

1. Gunpowder is poured into the muzzle, followed by a lead ball, and both are pushed in with a ramrod.
2. A small amount of powder is placed in the pan and covered with the frizzen (a lid).
3. When the trigger is pulled, the hammer strikes the frizzen, creating a spark that ignites the powder in the pan. This ignites the powder in the barrel, firing the lead ball.

SOURCE 4 The introduction of flintlock guns contributed to the decline of the samurai.



9.6 SkillBuilder activity COMMUNICATING

Advancements in technology regularly lead to the abandonment of traditional methods.

Discuss what cultural practices you think will be obsolete in the coming years, and what technology you think will cause this.

9.6 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 3, 4	1, 5, 7, 9	6, 8, 10

REMEMBER AND UNDERSTAND

1. **Recall** the role of the samurai in feudal Japanese society.
2. **Identify** the differences in the education of samurai boys and girls.
   A. Samurai boys were trained as soldiers from an early age.
   B. Samurai boys were both trained as soldiers and taught common household functions.
   C. Samurai girls were taught how to manage the household.
   D. Samurai girls were both trained as soldiers and taught common household functions.
3. **Determine** whether the following statements are True or False.
   a. Samurai boys were not trained as soldiers from an early age.
   b. Samurai were allowed to own land, but only if it was granted to them by their daimyō lord.
   c. Samurai women were not trained in military skills, and were instead expected to become faithful wives and mothers.
4. Bushidō was the _____ code of the samurai. Samurai were expected to be loyal and obedient to their daimyō lords. A samurai was expected to defend to the death his own family honour and the honour of his _____.
5. **Explain** why it was important for samurai to learn how to read and write, as well as fight.

ANALYSE AND APPLY

6. **Examine SOURCES 1** and **2**. **Identify** the advantages and disadvantages of fighting in armour like this.
7. **Compare SOURCES 3** and **4**. **Explain** why weapons such as the sword in **SOURCE 3** eventually became ineffective in battle.
8. The samurai were the Japanese equivalent of medieval European knights. **Analyse** the material in Topic 3, lesson 3.6 on the European knight and **explain** the similarities and differences between these two types of warriors. **State** which would be more effective at the time and why.

EVALUATE AND COMMUNICATE

9. **Create** a list of the values the samurai followed in the code of bushidō.
10. **Reflect** on what you have learned so far about bushidō.
    a. **Identify** which of these values are important to modern-day Australian military forces. Give reasons for your answer.
    b. Give some examples of how these values might be seen or used in practical situations today in Australian society.

Answers and sample responses for this topic are available online.

LESSON 9.7 How did people express themselves?

LEARNING INTENTION

By the end of this lesson you should be able to **identify** the major distinctive forms of Japanese arts and culture that flourished during the shōgunate period.

TUNE IN

Consider the folding screen in **SOURCE 1**. This would have been commissioned by a daimyō or wealthy noble from an artist.

SOURCE 1 A painted Japanese folding screen created in the early seventeenth century

1. **Discuss what you think it reveals about their passions and lifestyle.**
2. **What kind of art would you commission now to reflect your own passion and lifestyle?**

9.7.1 The importance of the arts

Japanese artists and craftspeople aimed for perfection in all they created. They believed their skills were sacred and respected their materials. For example, sword-makers prayed while they worked and believed a finished sword had its own spirit. Potters often made items with a semi-religious nature. The Japanese tea ceremony started from Chinese Buddhist rituals, so the cups and pots used were special. Sake containers also had a religious connection due to their use in Shintō festivals.

In the early feudal period, Japanese painters were influenced by Chinese styles. Many paintings had Shintō and Buddhist themes, often depicting saints, demons or sinners suffering in hell as a warning to live a good life. By the middle Heian period, a distinctive Japanese style of painting developed. Screens in wealthy homes were decorated with scenes from nature or animals. Picture scrolls told famous stories like *The Tale of Genji*, and artists created portraits of nobles and monks. The Muromachi period was known for colourful Shintō paintings and **monochrome** ink landscapes by Zen Buddhist monks.

TABLE 1 Some Japanese arts and crafts

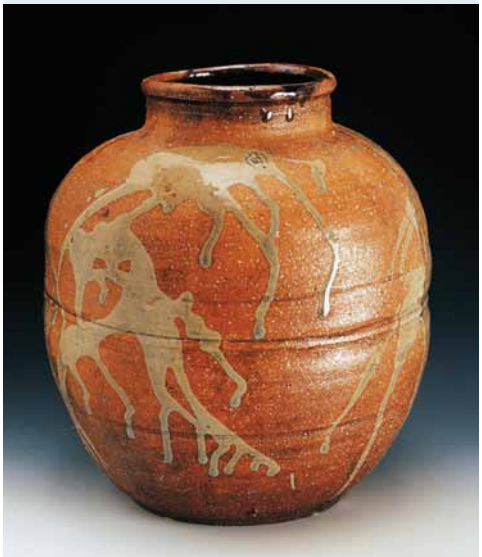
Art form	Description	Historical period	Notable examples	Materials	Techniques
Calligraphy	Traditional Japanese writing using a pointed brush dipped in ink, valued for beautiful handwriting, see **SOURCE 2**	Ancient to present	Annual competitions, ancient letters, poems, religious texts	Handmade paper (*washi*), ink	Pointed brush, ink, pigments, gold/silver leaf
Woodblock printing	Printing technique involving drawing on paper, gluing to wood block, chiseling, inking and pressing images, see **SOURCE 3**	Eighth century to present	*The Great Wave off Kanagawa* by Katsushika Hokusai	Wood, ink, paper	Chiseling, inking, pressing, multiple blocks for colours
Lacquer	Glossy coating made from tree sap with pigments, used on wooden articles, see **SOURCE 4**	Heian to early shōgunate period	Lacquered *tebako* (cosmetics box)	Wood, bamboo, pottery, metal, sap, pigments	Layering, engraving, inlaying, sprinkling gold/silver particles
Pottery	Range of items from unglazed vessels to glazed decorative vases, cups and pots for tea ceremony, see **SOURCE 5**	Earliest settlements to present	Raku ware, freshwater jar for tea ceremony	Clay, glaze	Hand-moulding, glazing, kiln firing

SOURCE 2 Japanese schools still teach calligraphy. This tradition is still practised widely throughout the country.

SOURCE 3 Hokusai woodblock print — *The Great Wave off Kanagawa*

SOURCE 4 A lacquered *tebako* (cosmetics box) dating back to the Heian period. The box has a design of plovers.

SOURCE 5 A freshwater jar created in the sixteenth century for use in the tea ceremony



SkillBuilder discussion

Continuity and change

1. Mind-map and list some recent and well-known types of Japanese art.
2. Is there a certain style or prominent artist?
3. Has Japanese art stayed the same or changed?

9.7.2 Theatre and performance

Kabuki theatre

The long and generally peaceful rule of the Tokugawa shōgunate contributed to art and culture reaching a new peak in the Genroku period (1688–1704).

With their bustling ports, lively pleasure districts and busy markets, large towns were exciting places to live. Attending plays at the kabuki theatre was a popular pastime (see **SOURCE 6**). **Kabuki** was a highly stylised form of theatre combining drama and dance with very elaborate costumes and makeup. The plays usually told stories of ordinary life and attracted all classes of people. About 40 per cent of the population could now read and write, so new literature was also popular.

SOURCE 6 A modern artist's impression of a kabuki theatre from the Edo period

- **A** *Hanamichi* — A walkway leads from the stage to the back of the theatre. It is used for dramatic entrances and exits.
- **B** *Suppon* — A man-powered lift-trapdoor is set in the walkway three metres from the stage. Ninjas, ghosts and monsters appear from here.
- **C** *Kuromiso* — Bamboo blinds on the left-hand side of the stage conceal musicians who play instruments to make the sounds of wind and rain.
- **D** *Marawibutai* — The centre of the stage can revolve. This is useful for changing scenes and clearly contrasting the previous scene from the present one.
- **E** *Masuseki* — These square, box-like seats can seat four people.
- **F** *Gidayuyuka* (*choboyuka*) — This place on the right-hand side of the stage is used to hide narrators and musicians.
- **G** *Omuko* — Seats in the gallery on the second floor are quite cheap. Kabuki fans and experts sit here to get a good view and cheer their favourite actors.

9.7 SkillBuilder activity HISTORICAL QUESTIONS AND COMMUNICATING

In groups of three or four, select one of the following topics for investigation and make an illustrated poster to be used as part of a class presentation.

- Raku (pottery)
- Ink landscapes
- Woodblock printing
- Buddhist art
- *Washi* (paper)
- Japanese screens
- Kabuki theatre

1. **Investigate**, conducting research, and note down 5–10 interesting facts about it.
2. Arrange the information you found into a logical order and **decide** on images that can accompany each piece of information.
3. **Plan** your poster. It should explain:
   - the materials used to create the object
   - the practical methods employed by the artist
   - the significance of this art form as an influence on artistic works in other parts of the world today.
4. **Create** your poster, ensuring it is clear and informative. Present your chosen art form to the class.

9.7 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 5	4, 6, 9	7, 8, 10

REMEMBER AND UNDERSTAND

1. **Identify** the method Japanese artists used to produce different-coloured paints.
   A. Melted crayons
   B. Ground-up minerals
   C. Ground-up insects
   D. Natural spices
2. **Explain** the significance of the use of expensive *washi* paper in producing works of calligraphy.
   A. The work was not just a functional piece of writing.
   B. It could be considered a work of art and be kept as a decorative item.
   C. The writer had run out of normal paper.
   D. Only writing on *washi* paper was considered to have value.
3. **Identify** what makes traditional Japanese writing a very demanding skill.
4. **Recall** how religious beliefs influenced the work of Japanese painters.
5. **Determine** whether the following statement is True or False.
   Lacquer was made from the sap of many different trees in order to obtain the different colours.

ANALYSE AND APPLY

6. **Explain** what the artefact in **SOURCE 1** would have been used for.
7. **Examine SOURCE 4**.
   a. **Construct** a one-paragraph description that would help museum visitors understand what this item looks like and how it was made.
   b. **Explain** what this object tells us about the people who made and used it.
8. **Analyse SOURCE 5**. **Explain** what evidence there is that the techniques and colours used in pottery were inspired by the Japanese love of nature.

EVALUATE AND COMMUNICATE

9. **Consider SOURCE 2**. From the appearance of the writing, **propose** where Japan's writing system originated from.
10. **Evaluate** the level of audience participation you think there was in a kabuki play. First study the labels and then provide evidence from **SOURCE 6**.

Answers and sample responses for this topic are available online.

LESSON 9.8 How did people use the land?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** Japan's environmental and land use problems in the seventeenth century
- **identify** the methods adopted by the Tokugawa shōguns to solve these issues.

Tune in

As the Japanese population grew, so too did the amount of land needed to grow food. **SOURCE 1** shows how much land was used over the years as Japan's population increased. Compare Japan's population in 1874 (35 million) with Australia's population today (26 million).

SOURCE 1 The growth in Japanese land under cultivation — tenth to nineteenth century

Year	Estimated land under cultivation (hectares)
930	862 000
1450	946 000
1600	1 635 000
1720	2 970 000
1874	3 050 000

Source: From Professor Shinzaburo Oishi, *Edo Jidai* (*The Edo Period*), Chuko Shinsho no. 476, 1977

1. **Discuss how much land you think is used worldwide to feed Australians.**
2. **How different do you think it would be to Japan's use in the past? Why do you think this?**

9.8.1 Patterns of land use

Japan is made up of many islands with mountainous and forested terrain, leaving only about 30 per cent of its 378 000 square kilometres suitable for farming. Managing this limited land has always been crucial.

Rice has been Japan's main crop and an essential part of its diet. During the Tokugawa shōgunate, over 90 per cent of the population were peasants farming the land, which was owned by daimyō and samurai families. Peasants paid a 'rice tax' to use the land, ensuring their right to farm it.

SkillBuilder discussion

Historical questions

1. Why do you think farmers in Japan created rice paddy fields on the sides of mountains?
2. How might terracing help in the cultivation of rice in mountainous regions?
3. What challenges do you think were faced growing rice this way?

SOURCE 2 Rice paddy fields are terraced on to the side of mountain slopes.

The Tokugawa shōgunate expanded farmland by using large water projects to create new rice paddies from previously unused land. In 1603, about 1.6 million hectares were farmed and, by 1720, this had nearly doubled to 3 million hectares. This increase in farmland supported a growing population.

9.8.2 Environmental impact

During the seventeenth century, Japan faced a serious deforestation problem. Timber was essential for building homes, castles and temples, as well as for cooking and heating. While forests could supply enough wood when the population was small, by 1670, the population had grown to almost 30 million. The demand for timber increased as new cities and farms were developed.

This rapid growth caused large areas of forest to be cleared, leading to soil erosion, landslides and flooding. Japan was on the brink of an environmental crisis.

SOURCE 3 Houses of farmers and rural workers were made almost entirely of wood.

9.8.3 Protecting the environment

By 1670, the shōgun introduced measures to manage deforestation. Strict controls were placed on logging in forests controlled by the shōgun and wealthy daimyō. Permits became mandatory, and theft was harshly punished. Sustainable forest management practices were introduced, such as only harvesting mature trees, protecting young seedlings and thinning forests to allow younger trees to grow. These actions limited further environmental damage.

Many daimyō began growing new forests in areas where natural forests had been cut down. They taught villagers to grow seedlings from pine and cedar trees. Farmers planted these seedlings near their land to boost timber supply. Timber plantations then became a business, with careful logging to provide wood for sale. By the eighteenth century, Japan led the world in forest management.

SOURCE 4 A house from the Edo period. The use of tiles on the roof and the plastering of the walls were designed to minimise the risk of fire.

Building techniques also changed during the Edo period to reduce fire risk. Fires in towns often destroyed wooden houses, increasing timber demand for rebuilding. Using roof tiles instead of thatch and plastering timber walls helped prevent fires, reducing timber use for reconstruction.

9.8 SkillBuilder activity HISTORICAL SIGNIFICANCE AND COMMUNICATING

Another action of the Tokugawa shōgunate was its forestry policies, which introduced severe punishment for anyone who stole timber from lands controlled by the shōgun.

a. Imagine you are a village leader, and a member of your village has taken a small amount of timber for firewood to keep a sick child warm. **Outline** the arguments you would put to the local daimyō in begging for mercy for your villager.

b. The daimyō has to consider the case.

- **i. Identify** one reason why he might be prepared to show mercy.
- **ii. Identify** one reason why he might not be prepared to show mercy.

9.8 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 7, 9	6, 8, 10

REMEMBER AND UNDERSTAND

1. **Explain** what was the 'rice tax'.
   A. The rice tax was a tax paid by peasants calculated on how much rice they consumed.
   B. The rice tax was a tax paid by peasants who farmed the land to the daimyō nobles who owned the land.
   C. The rice tax was a tax paid by daimyō nobles to the shōgun.
   D. The rice tax was a tax paid by the daimyō nobles to the peasants who farmed the land.
2. **Explain** what factors may have contributed to the rapid increase in population during the early years of the Tokugawa shōgunate.
   A. The peaceful time in history
   B. The availability of additional food
   C. Large-scale water projects
   D. Immigrants from France and Portugal
3. In 1570, before the Tokugawa period, the population of Japan was only about _____ million. While the population was small, the available forests were able to supply all the _____ needed.
4. **Explain** why deforestation became a serious problem in Japan.
5. **Identify** the ways in which the harvesting of timber was restricted by the shōgun and many of the daimyō after 1670.

ANALYSE AND APPLY

6. **Compare** the period 1600–1720 with the period from 1720 to 1874 in **SOURCE 1**. **Explain** what you notice about the second period when compared with the first.
7. **Examine SOURCE 2**. **Explain** how it was possible to expand the area of land under cultivation in a mountainous country such as Japan.
8. **Analyse SOURCE 3**.
   a. **Explain** how the construction of large numbers of houses, such as that in **SOURCE 3**, might have contributed to the deforestation problem.
   b. **Identify** a major risk if large numbers of these houses were built close together in a village or town.
9. **Explain** how the new building techniques demonstrated in **SOURCE 4** were able to contribute to solving the deforestation problem.

EVALUATE AND COMMUNICATE

10. **Evaluate** whether it would have been likely for the shōgunate to intervene in forestry practices across Japan if the deforestation problem had not become so severe. Give reasons for your response.

Answers and sample responses for this topic are available online.

LESSON 9.9 How did Japan rejoin the world?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **recognise** the external pressures that applied to Japan's isolationism during the Edo period
- **explain** why the shōguns eventually could not keep out foreign influences.

Tune in

The English had a great deal of control in China during this time, which may have influenced the Japanese leadership's willingness to work with them.

SOURCE 1 Extract from Commodore M.C. Perry, *Narrative of the Expedition of an American Squadron to the China Seas and Japan*, McDonald & Co., London, 1954, p. 62

> The Commander-in-Chief will not go to Nagasaki and will receive no communication through the Dutch or the Chinese ... if this friendly letter of the President to the Emperor is not received and duly replied to, [the Commander-in-Chief] will consider his country insulted, and will not hold himself accountable for the consequences.

1. **Discuss what you think this letter means.**
2. **Who do you think the 'Commander-in-Chief' is?**
3. **Why do you think a letter like this might have been written?**

9.9.1 The breakdown of isolation

The Tokugawa shōguns tried to ensure that Japanese life was as cut off from the rest of the world as much as possible. This meant that they were able to control trade with foreigners and that they would receive all the profits from other nations.

Some of the first westerners to arrive in Japan were Portuguese traders who landed by accident after being blown off course. While their ship was being repaired, they introduced handheld guns to the Japanese, sparking widespread production of firearms by local artisans. Other westerners, like Francis Xavier from Spain, introduced Christianity in 1549, and William Adams, an Englishman, became one of the first western samurai. After this initial period of contact, Japan adopted the *sakoku* policy, isolating itself from most foreign influence.

Despite 250 years of isolation under the Tokugawa shōgunate, the *sakoku* policy eventually failed. By the nineteenth century, European countries and the United States were expanding their empires into the Pacific, making it impossible for Japan to keep foreign influences out indefinitely.

The sakoku policy

From 1640, the Dutch and Chinese were allowed a limited presence on Dejima, an artificial island in the Nagasaki harbour. Dutch traders could not enter the mainland, except for an annual visit to Edo to present gifts like clocks, telescopes and medical instruments to the shōgun. This introduced European technology to Japan. Japanese scholars studied Rangaku ('Dutch learning') by translating Dutch books during the isolation period.

Contact with the Dutch gave Japan access to European scientific knowledge and literature. By the mid-nineteenth century, increasing trade demands in the Pacific made it impossible for Japan to maintain its isolation from foreign powers.

Black ships

In the 1830s and 1840s, western countries tried to contact Japan, but the shōgunate rejected them. In 1853, Commodore Matthew Perry of the US Navy sailed into Edo harbor with four warships, wanting to open trade. He threatened military action if Japan refused. Japan built stronger forts around Edo, fearing more 'black ships'. In 1854, Perry returned with more ships, and Japan agreed to the US demands, drafting a **treaty**.

SOURCE 2 Commodore Matthew Perry threatened military action by sea

Did you know?

The island of Dejima was created in 1634 by cutting a canal across a narrow isthmus connecting a small peninsula to the mainland. The resulting island was then linked to the mainland by a bridge, which was guarded day and night to prevent any unauthorised crossing.

Unequal treaties

In 1854, the Treaty of Kanagawa with the United States opened two ports for North American trade and ensured good treatment for shipwrecked US sailors. By 1858, Japan was pressured into another treaty, opening more ports and allowing North Americans to live and work in Japan. It also imposed low tariffs on imported goods. Soon, similar treaties were forced upon Japan by Russia, France and Britain.

The Nagasaki Naval Training Centre

In response to the growing foreign threat, the shōgunate established a naval training centre near Dejima Island in 1855. Dutch Navy instructors were hired to teach the latest marine technology and naval organisation. Steam-driven warships were acquired, laying the foundation for a modern Japanese navy.

SOURCE 3 A nineteenth-century map of the Nagasaki Naval Training Centre, established near Dejima Island in 1855

SkillBuilder discussion

Historical significance

The ruling Tokugawa shōgunate opened a naval training school at Nagasaki in 1855. Suggest reasons why this training school was a significant development.

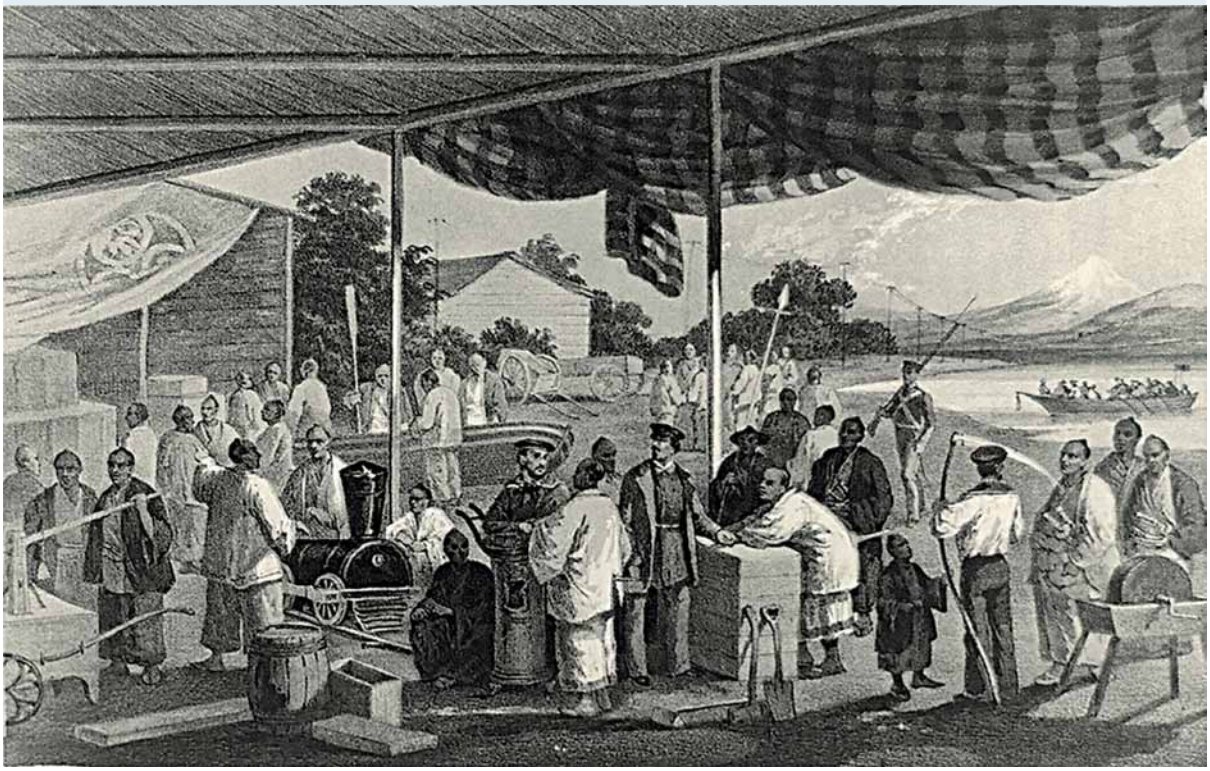
9.9.2 Decline of shōgunate rule

The emperor had appointed the shōgun to protect Japan from barbarians, so the shōgun's failure to prevent foreign trade angered many samurai clans. While some continued to support the shōgun, others saw the emperor as the only authority capable of unifying the country. Violent clashes between supporters and opponents of the shōgunate erupted over the next decade.

Some samurai independently attacked and killed foreigners. The Chōshū clan even blocked a key waterway and bombed foreign ships, but western forces retaliated, destroying Chōshū's forts and weapons.

Meanwhile, Japanese scholars proposed adopting western knowledge to protect Japan's culture and maintain independence, building on skills learned from Dutch traders and Portuguese missionaries.

SOURCE 4 When Commodore Perry returned to Japan in 1854, he introduced examples of western technology, including a miniature steam locomotive and the electric telegraph.



Why did the shōgunate's power decline?

After more than 250 years of stability under the Tokugawa shōguns and almost 700 years of shōgunate government, why were the shōguns unable to maintain their power and continue the long period of isolation from the outside world? Examining the following developments may help us to explain this decline in shōgunate power.

SOURCE 5 The signing of the Kanagawa Treaty, 1854

TABLE 1 Reasons for decline in shōgunate power

Topic	Details
Tokugawa shōguns and isolation	Unable to completely isolate Japan; Rangaku study increased in popularity
Rangaku	European discoveries in science and technology beneficial to Japan
Tokugawa shōguns and daimyō	Limited wealth and power of daimyō; decline in power affected feudal role
Merchant class	Low on feudal pyramid; vital role with more trade opportunities
Crop failures and famine	Early nineteenth century; four-year famine; peasant rebellions; fire in Osaka
Treaty of Kanagawa	Forced on shōgun by Commodore Perry; showed shōgun's weakness

9.9.3 Emperor Meiji and modern Japan

When Emperor Komei died in 1867, his 15-year-old son Prince Mutsuhito became emperor of Japan. He took the reign name Meiji. In 1868, several samurai clans and some important court nobles forced the resignation of Shōgun Yoshinobu, the last of the Tokugawa shōguns. The clans seized the imperial palace in Kyoto and declared the 'restoration' of the emperor to full power. The shōgunate forces tried to defeat them but fell back to defend Edo.

Recognising the strength of the imperial forces, Shōgun Yoshinobu surrendered the city.

The new emperor was carried in a heavily guarded royal palanquin from Kyoto to his new home, the shōgun's palace, Edo Castle. The city of Edo was renamed Tokyo, meaning 'eastern capital'. It was the beginning of a new age.

The transfer of power from the shōgunate to the emperor is known as the Meiji Restoration. Although the emperor was still the spiritual leader of Japan, he did not take control of the country. Emperor Meiji and over 760 daimyō signed a document called the Charter Oath, a five-point statement introducing a new democracy. However, the main decisions were still made by the same samurai groups who had restored the emperor as the head of government in Japan.

SOURCE 6 An illustration of Emperor Meiji as a young man

SkillBuilder discussion

Continuity and change

Do you think the Charter Oath achieved all the things it promised? Read **SOURCE 7** again and, as a class, decide how many of the five points were actually put into practice during the Meiji period.

SOURCE 7 The Charter Oath 1868

By this oath, we set up as our aim the establishment of the national wealth on a broad basis and the framing of a constitution and laws.

Deliberative assemblies shall be widely established and all matters decided by open discussion.

All classes, high and low, shall be united in vigorously carrying out the administration of affairs of state.

The common people, no less than the civil and military officials, shall all be allowed to pursue their own calling so that there may be no discontent.

Evil customs of the past shall be broken off and everything based upon the just laws of Nature.

Knowledge shall be sought throughout the world so as to strengthen the foundation of imperial rule.

9.9 SkillBuilder activity **COMMUNICATING**

1. **Create** a timeline that shows the significant events that took place in Japan between 1853 and 1871.
2. **Explain** what aspects of Japanese life and society changed the most. **Justify** your opinion.

9.9 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4, 9, 10	6, 7, 8

REMEMBER AND UNDERSTAND

1. **Explain** in what ways the arrival of Commodore Perry in 1853 was different from the contact made by other western visitors in the 1830s and 1840s.
   A. Commodore Perry offered large financial inducements.
   B. Commodore Perry established solid relationships with the Japanese.
   C. Commodore Perry threatened military action.
   D. Commodore Perry had many exotic items for trade.
2. **Explain** what the United States gained from the Treaty of Kanagawa. **Select** all that apply.
   A. The treaty opened two more ports to the North Americans and ensured better treatment of any shipwrecked US sailors.
   B. A further treaty was signed four years later opening more ports, which allowed more North Americans to live and work in Japan.
   C. Very high tariffs were imposed on goods imported into Japan.
   D. A third treaty allowed for the establishment of a US naval base on the island of Tsushima.
3. **Recall** one way that Japan maintained limited contact with the outside world during the isolationist Edo period.
4. **Explain** how the Treaty of Kanagawa and similar agreements were seen to have weakened the authority of the shōgun.
5. **Determine** whether the following statement is True or False.
   The period of the Edo shōgunate came to an end when Yoshinobu ran out of money due to the fighting and had to surrender, and then resign.

ANALYSE AND APPLY

6. **Examine SOURCE 1**. **Propose** what Commodore Perry meant by the words, '[the Commander-in-Chief] … will not hold himself accountable for the consequences'.
7. **Analyse SOURCE 3**.
   a. **Explain** how the island of Dejima was originally created and what its purpose was.
   b. **Explain** in what way the use of the island changed after 1855.
   c. **Explain** what this change of use tells us about the Japanese attitude towards foreigners.
8. **Summarise** how the examples of western technology shown in **SOURCE 4** influenced the views of many Japanese scholars.

EVALUATE AND COMMUNICATE

9. **Identify** the US and Japanese figures in **SOURCE 5**. **Suggest** who appears to be the most powerful person in this image. **Explain** your answer.
10. **Determine** how you can tell that Emperor Meiji, as shown in **SOURCE 5**, was influenced by European ideas rather than Japanese tradition.

Answers and sample responses for this topic are available online.

LESSON 9.10 Inquiry: What is the significance of Shintō and Buddhism?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **summarise** the key concepts of Buddhism and Shintō
- **highlight** the significance of these religions on Japanese culture and society.

Scenario

You are a tour guide in Nara, the first imperial capital of Japan from the fourth century until the year 794. You wish to prepare a guidebook for visiting tourists on the influence of the two main religions, Shintō and Buddhism, on Japanese history and culture. As Nara is home to the Kasuga Taisha Shintō shrine and the Tōdai-ji Buddhist temple, you are going to use these two landmarks to help illustrate the features of the two dominant religions of Japan.

Task

Prepare a guidebook on the Shintō and Buddhist religions, highlighting their importance in Japanese history and culture. Refer to the Kasuga Taisha Shintō shrine and the Tōdai-ji Buddhist temple or other structures of your choice which reflect these two faiths.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task. At the end of the inquiry task you can use this rubric to self-assess.

SOURCE 1 The Kasuga Taisha Shintō shrine in Nara

Inquiry steps

Step 1: Questioning and researching

Write your **Inquiry question**. This is what you want to have answered in your guidebook.

Research the following:

- origins and main beliefs of the traditional Shintō religion
- the main beliefs of Buddhism, and how it came to Japan from southern Asia
- how the two religions have existed side by side in Japan for centuries, and continue to do so today
- the purposes and uses of shrines and temples in both religions
- key features of Shintō shrines, such as the Kasuga Taisha, and Buddhist temples, such as the Tōdai-ji temple in Nara Park, and the history of these two landmarks
- the influence of the two religions during the Tokugawa shōgunate.

Step 2: Using historical sources

Analyse the information you have found. Does it answer the inquiry question?

Step 3: Historical perspectives and interpretations

Evaluate the information and select the most relevant pieces for your guidebook.

Step 4: Communicating

Communicate your findings by **creating** an engaging guidebook for visitors, highlighting the achievements of Japanese culture which have been influenced by these religions. Your guidebook should be attractive and informative but also answer your inquiry question.

LESSON 9.11 Review

9.11.1 Key knowledge summary

Use this dot-point summary to review the content covered in this topic.

9.2 How do we know about Japan under the shōguns?

- Japanese architecture tells us a lot about the way people lived.
- Artworks such as paintings provide evidence of the way people lived in feudal Japan.
- Great works of literature often describe important events and people's lifestyles.
- Government documents were kept as national treasures.
- Many traditional festivals and ceremonies survive today, giving us a view of some important traditions.

9.3 What was life like in early Japan?

- The first Japanese state was established by the Yamato clan around the town of Nara.
- During the Classical period, Buddhism was firmly established and the first great works of literature appeared.
- Land reform was attempted in the seventh century but was abandoned as emperors granted land to their supporters.
- In 794, the emperor moved his capital to Heian-kyō (modern-day Kyoto), beginning the Heian period.
- The Heian period saw growth in the power and importance of the daimyō and the samurai.

9.4 How did the shōguns take control?

- Disputes arose in 1180 over the succession to the imperial throne, leading to a civil war.
- The Minamoto clan supported the successful claimant to the throne, and its leader Yoritomo was appointed shōgun in 1192.
- From 1192, power passed from the emperor to the shōgun for 700 years.
- The shōguns became so powerful because they were able to command military forces and maintain order.
- In 1464, a dispute between two members of the Ashikaga clan led to civil war and a hundred years of instability known as the age of the warring states.
- Order and unity were restored through the military conquests of the three great unifiers: Oda Nobunaga, Toyotomi Hideyoshi and Tokugawa Ieyasu.
- The Tokugawa shōguns also set up processes to isolate Japan from the rest of the world, in order to maintain the traditional Japanese way of life.

9.5 How did Japanese society organise itself?

- Feudal society divided Japan into rigid social classes, with the emperor and the daimyō nobles at the top of the class structure.
- Below the ruling class were the samurai, peasants and artisans, with merchants at the bottom of the *shi-nō-kō-shō* structure.
- *The Pillow Book*, written during the Heian period, gives us an insight into the lives of women in feudal Japan.
- Geishas were trained in art, music, dance and interesting conversation, and they entertained their clients with these skills.

9.6 Who were the samurai?

- The samurai class was established to serve the daimyō and provide them military support.
- The samurai followed a warrior code known as bushidō.
- *Ronin* were members of the samurai class who did not have a daimyō master to serve.
- The samurai gradually lost influence when their methods of fighting became obsolete and the peaceful period of the Tokugawa shōgunate gave them no opportunities to fight.

9.7 How did people express themselves?

- Japanese painting was influenced by Chinese styles and often depicted religious scenes.
- Japanese calligraphy was an art in itself and a highly prized skill.
- Woodblock printing was a popular and highly skilled art form that reached its peak in the eighteenth century with the work of artists such as Katsushika Hokusai.
- Lacquer work produced many fine objects and was achieved by painting many thin layers over objects made from wood, bamboo or pottery.
- Pottery was created both for useful purposes such as food storage and decorative purposes.
- The Tokugawa period saw the blooming of the performing arts, such as kabuki theatre.

9.8 How did people use the land?

- The primary use of land throughout the feudal period in Japan was for farming, particularly the growing of rice.
- The Tokugawa period saw a rapid expansion in the amount of land under cultivation.
- By the seventeenth century, Japan began to experience a deforestation problem, so a variety of measures were put in place to make forestry more sustainable.

9.9 How did Japan rejoin the world?

- By the nineteenth century, western nations were expanding their empires and wanted to trade with Japan.
- In 1853, Commodore Perry threatened the Japanese government with military action if trade was not opened to the west.
- The Tokugawa shōguns were no longer powerful enough to resist foreign invaders and some clans supported the return of the emperor to supreme power.
- In 1868, Emperor Meiji went from Kyoto to Tokyo to claim power.
- A number of clans loyal to the Tokugawa shōguns resisted the restoration of power to the emperor but were defeated during the Boshin civil war.
- Emperor Meiji set out to modernise Japan and sent missions to other countries to learn of new technology.
- By the beginning of the twentieth century, Japan had become a modern and powerful nation.

9.10 Inquiry: What is the significance of Shintō and Buddhism?

- The Shintō and Buddhist hold great importance in Japanese history and culture.
- The Kasuga Taisha Shintō shrine and the Tōdai-ji Buddhist temple in Nara are important religious landmarks.

9.11.2 Key terms

archipelago an area that contains a chain or group of islands scattered in lakes, rivers or the ocean
artisan a skilled worker who produces handmade items
beriberi a disease caused by a lack of vitamin B
biwa a four-stringed Japanese musical instrument
Buddhist to do with Buddhism; a follower of Buddhism
bushidō the way of the warrior; the rules that prescribed correct behaviour for all samurai
calligraphy the art of beautiful handwriting
centralised control of a country from one central location
civil war a war between two competing groups within one country
clan a large group of closely related people
conscript a person ordered by the government to do compulsory military duty
daimyō great feudal lord of Japan during the Classical and shōgunate periods
deliberative having the power to make decisions
diet the name given to a law-making assembly in some countries
domain the territory ruled by a daimyō, including the farming and fishing villages within it

glaze a substance fused onto pottery to give it a glass-like appearance
hostage a person kept for security
kabuki a colourful form of theatre combining play-acting, dance and music
kana a writing system that represents Japanese syllables
kiln an oven used at high temperatures to heat and harden ceramic items
monochrome varying tones of a single colour, usually black and grey
monopoly an organisation or group that has complete control of something
musket a muzzle-loading gun with a long barrel
origami the art of folding paper into different shapes and designs
pagoda a Hindu or Buddhist temple, typically in the form of a many-tiered tower
palanquin a sort of couch for transporting passengers, with long poles on each side so that servants could carry it on their shoulders
pigment a natural colouring material made of plant or animal tissue
polytheistic the belief in or worship of more than one god
regent a person appointed to rule a country if a monarch is too young or ill to do so
ronin a wandering samurai who had no lord or master
sake a Japanese alcoholic drink made from fermented rice; sometimes known as rice wine
samurai the warrior class in Japan during the Classical and shōgunate periods
seppuku a form of ritual suicide, carried out by disembowelling oneself (cutting open the abdomen) with a sword
shaman a person who claims to communicate with spirits through mystic rituals
Shintō an ancient Japanese religion the followers of which believe in nature spirits and ancestor worship
shōgun literally 'barbarian-conquering great general'; the Japanese emperor's chief military adviser and hereditary commander-in-chief, with the duty to protect Japan from foreign invasion
tariff a tax on goods imported from a foreign country
tea ceremony an ancient Japanese ritual of serving and drinking tea
treaty a formal agreement between two or more nations
tributary a state that gives payment to another state or ruler
tuberculosis a serious and infectious disease that affects the lungs
typhoon name given to big tropical storms in the Pacific and Indian Ocean
vassal a person who holds land for a lord, and in return pledges loyalty and service to him
washi handmade paper created from the bark or fibre of various shrubs, grasses or trees

9.11.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the overview.

How has the Japanese way of life and the roles and relationships of different groups changed over time?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

learnon

Post-test	Online post-test
eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary

9.11 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 4, 8, 9, 11	1, 5, 10, 12	3, 6, 7, 13, 14

REMEMBER AND UNDERSTAND

1. How did the daimyō become very powerful during the Heian period?
   - **A.** They were great warriors.
   - **B.** They were very loyal to the samurai.
   - **C.** The emperors relied on them to maintain their power.
   - **D.** They supported land reform.
2. Which best describes the *shi-nō-kō-shō* arrangement of social classes?
   - **A.** Merchants were higher in rank than farmers and fishers.
   - **B.** Artisans were higher in rank than samurai.
   - **C.** Artisans were higher in rank than merchants.
   - **D.** The shōgun was ranked highest of all.
3. What did the treaty of Kanagawa give to the United States?
   - **A.** Access to two Japanese ports for trade
   - **B.** The right to rescue shipwrecked sailors
   - **C.** The right to take over from the Dutch as the main overseas trader
   - **D.** A military base for the 'black ships'
4. What was the 'rice tax'?
   - **A.** A form of rent paid by peasants to the landowner
   - **B.** A tax levied on rice merchants by the shōgun
   - **C.** A type of tax paid by restaurant owners
   - **D.** A tax paid by rice farmers to the samurai
5. How do we know the Japanese borrowed much of their culture from China?
   - **A.** They speak the same language.
   - **B.** They adopted Chinese characters in their writing.
   - **C.** They modelled all their cities on Chinese cities.
   - **D.** Both societies were ruled by an emperor.
6. The three powerful clans competing for influence during the Heian were:
   - **A.** the Fujiwara, the Minamoto and the Taira.
   - **B.** the Kamakura, the Taira and the Yoritomo.
   - **C.** the Minamoto, the Tokugawa and the Fujiwara.
   - **D.** the Tokugawa, the Kamakura and the Yoritomo.
7. How did the appointment of Minamoto no Yoritomo as shōgun affect the emperor?
   - **A.** The emperor was able to exert more authority because he had the support of the shōgun.
   - **B.** The emperor lost all his power as the leader of the country.
   - **C.** The emperor took on mainly religious and ceremonial duties.
   - **D.** The emperor was more powerful because of his religious duties.
8. How were the Japanese were able to defeat the Mongol invaders?
   - **A.** The samurai were more powerful warriors than the Mongols.
   - **B.** The Mongol ships were wrecked by fierce storms.
   - **C.** The daimyō were superior military commanders.
   - **D.** The Japanese were supported by warriors known as 'kamikaze'.
9. With regard to the rest of the world, the Tokugawa shōguns pursued a policy of:
   - **A.** inclusion.
   - **B.** distrust.
   - **C.** involvement.
   - **D.** isolation.

10. When would a samurai become a *ronin*?
    A. If he chose to become a bandit
    B. If his master could no longer employ him
    C. If he became a farmer
    D. If he was promoted to become a daimyō

ANALYSE AND APPLY

11. **Identify** the key dispute that led to civil war from 1467 to 1477.
12. **Explain** how Oda Nobunaga was able to rise to importance in Japan after 1565.

EVALUATE AND COMMUNICATE

13. **Summarise** why Tokugawa Ieyasu allied himself with Oda Nobunaga.
14. a. Now that you have completed this topic, **reflect** on the role religion has played in Japanese history. **Discuss** in a brief paragraph.
    b. Considering that power shifted from the emperor to the shōguns during the Tokugawa shōgunate, **discuss** how you would change your answer to the previous question. Write a paragraph in response and **justify** your claims.

Answers and sample responses for this topic are available online.

10 Mongol expansion

LESSON SEQUENCE

online only

10.1 Overview
10.2 How do we know about the Mongol expansion?
10.3 What was China like before Mongol conquest?
10.4 Who were the Mongols?
10.5 How did Temujin come to power?
10.6 How did the Mongols conquer the world?
10.7 What was China like under Mongol rule?
10.8 What was the Yuan court like?
10.9 Was there peace under Mongol rule?
10.10 How did the empire end?
10.11 Inquiry: How did the Mongolian armies conquer and control societies?
10.12 Review

LESSON 10.1 Overview

INQUIRY QUESTION

The Mongol Empire stretched from Europe to the Pacific Ocean. What allowed the Mongols to spread their influence? What was the way of life in Mongolia, and what impact did they have on the world?

The Genghis Khan Equestrian Statue, a stainless steel statue of Genghis Khan (Temujin) in Mongolia. It is the largest equestrian statue in the world.

The Empire of the Great Khan spread further than any other empire before, dwarfing the conquests of Greece and Rome. From the Pacific Ocean to the east of Asia to the Mediterranean, people under Mongol rule knew peace. Old learning and new ideas spread and the foundations of the modern world were established.

learnon

- **Pre-test**
  Online pre-test
- **eWorkbook**
  Customisable worksheets for this topic
- **Digital document**
  Key terms glossary
- **Video eLesson**
  Mongol expansion

960
Emperor Taizu reunites China and establishes the Song dynasty.

1125
The Jin dynasty is established when the Khitan are defeated by the Jurchen.

1209
Northern Uyghur tribe accepts Mongol rule.

1210–1350
Pax Mongolica lasts for about 140 years.

CE 950 — 1000 — 1050 — 1100 — 1150

1004
Song dynasty establishes peace with powerful Khitan tribes to its north.

1206
Genghis Khan is proclaimed ruler of the Mongols and begins his conquest.

1211
Genghis Khan invades China.

SkillBuilder

Use the SkillBuilder activities to develop these Historical concepts and skills:

- HISTORICAL QUESTIONS
- CHRONOLOGY
- USING HISTORICAL SOURCES
- CONTINUITY AND CHANGE
- CAUSES AND CONSEQUENCES
- HISTORICAL SIGNIFICANCE
- COMMUNICATING

1227
Genghis Khan dies.

1234
Mongol forces complete conquest of northern China and defeat northern Song.

1258
Mongol army invades Poland.

1254
Marco Polo is born in Venice.

1281
Japan defeats a second Mongol invasion force.

1200 — 1250 — 1300 — 1350 — 1400 — CE

1215
Mongols attack the Jin dynasty and destroy its capital, Zhongdu.

1271
Kublai Khan declares himself the emperor of Yuan China.

1271–1295
Marco Polo's travels take place.

1294
Kublai Khan dies.

1325
Peasant rebellion against Yuan dynasty begins.

1368
Yuan dynasty is defeated, marking the end of Mongol Empire.

LESSON 10.2 How do we know about the Mongol expansion?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** that what we know about the past depends largely on the sources we find, who created them and why.

Tune in

The *paiza*, or Mongol passport, shown in **SOURCE 1** was used by those travelling through the Mongol Empire on official business. It was worn around the neck so that it would be visible to customs officers who would let the wearer pass.

The inscription reads, 'By the strength of Eternal Heaven, an edict of the Emperor [Khan], he who has no respect shall be guilty.'

Compare **SOURCE 1** to a modern-day passport. In what ways is this *paiza* similar, and in what ways is it different?

SOURCE 1 A *paiza*

10.2.1 Mongol expansion sources

In this topic, we will explore the Age of the Mongols, from about 1206 to 1368 CE. For many, this was a time of war and destruction inflicted by the Mongol army. For others, it was a time of peace, when ideas and religions could be shared and cultural barriers between Europe and Asia were lowered.

This peace helped spread ideas and allowed scholars to write more. Many written records survived because there was less war and more sharing of knowledge.

10.2.2 State history

Governments often create official histories to be remembered by future generations. A few decades after Genghis Khan's death, the Mongol leaders commissioned a writer to document his life and that of his son in *The Secret History of the Mongols*. This book was meant for the Mongolian rulers and celebrated Khan's heroic deeds. It included lessons for keeping the empire strong (see **SOURCE 2**).

SOURCE 2 *The Secret History of the Mongols* is a mixture of prose and verse, and contains many lessons. The following is an excerpt describing a lesson the mother of Genghis Khan taught her sons.

She gave unto each [of her five sons] a single arrow shaft, saying 'Break [it]!' The single [arrow shaft] — how could they have hindered [it from breaking]? — each brake and cast away. Again, she bound five arrow shafts together in a bundle and gave [them to her sons], saying, 'Break [them]!' All five, holding, every person, the five arrow shafts bound in a bundle, were in turn not able to break [them].

SkillBuilder discussion

Using historical sources

1. What lesson do you think Genghis Khan's mother was trying to teach her sons by using the example of the arrow shafts?
2. Why do you think the author chose to use both prose and verse in *The Secret History of the Mongols*? How does this combination affect the storytelling?
3. In what ways can the metaphor of the single arrow versus the bundle of arrows be applied to other aspects of Mongol society or Mongol military strategies?

10.2.3 The writings of explorers

During the Middle Ages, people in Europe called China the 'Middle Kingdom' because the Chinese had long referred to their own land this way, believing it was the centre of civilisation, with other regions surrounding it. Legends of its wealth and mystery filled the popular imagination. Following the publication of *The Travels of Marco Polo*, interest in the region increased. Sources such as **SOURCE 3** give information about both the Mongols and what other societies thought of the Mongols.

SOURCE 3 Marco Polo's descriptions of the khan's prowess on and off the battlefield helped to make the Great Khan a celebrity in Europe.

When Nayan and his men saw their camp thus encircled by the khan and his host, they were seized with amaze; yet they ran to arms, formed themselves in order of battle, and were soon prepared to strike. Then began the beating on many instruments, and singing with loud voices; for it is the custom of the Tartars [Mongols], that until the horn termed naccar is winded the troops do not engage.

But when that grand trumpet of the great khan was sounded, all the other performers began playing, and raising their voices very loud, making a noise that was truly most wonderful. Then the two armies rushed against each other with sword, spear, and lance, while the footmen were prepared with bow and quiver. The battle was fierce and cruel; the arrows filled the air like rain; horses and horsemen were seen falling to the ground; and the tumult was such, that if Jove had thundered, he could not have been heard. Nayan was a baptized Christian, and therefore had the cross upon his standard.

Never, in our day, was there so hard and terrible a combat, nor so many assembled on one field, especially of horsemen; and the number who fell on both sides was fearful to behold. The battle continued from nine in the morning till midday; but the great khan at last remained master of the field.

10.2.4 Everyday objects

To better understand the lives of the Mongol people, it is important to look at the everyday objects they left behind (see **SOURCE 1**). Much can be learned from simple things like tools, jewellry, houses and food.

10.2.5 An artistic view

Artwork gives great insight into both the artist's feelings and the audience for whom it was created. During Mongol rule, Chinese artists made calligraphy and paintings depicting everyday life, landscapes and famous battles (see **SOURCE 4**). Centuries later, some artworks, like the painting in **SOURCE 5**, show the power of the Mongol army.

SOURCE 4 This thirteenth-century artwork depicts Kublai Khan, grandson of Genghis Khan, in a hunting party. This source was created using ink and colour on silk during the Mongol expansion.

SOURCE 5 A sixteenth-century illustration of Genghis Khan and his Mongol hordes attacking a Tangut (Xi) fortress in western China, circa 1205

SkillBuilder discussion

Historical questions

1. Discuss with a partner the reliability of this source.
2. What questions do you have about what you see in this image?

10.2 SkillBuilder activity USING HISTORICAL SOURCES

Analyse SOURCES 4 and **5**. **Identify** examples of the artist's bias or personal perspective in what is depicted.

Consider:
- when the source was created
- who it might have been created for
- what the artist was trying to show their audience.

10.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	5, 6, 8, 11	4, 7, 9, 10, 12

REMEMBER AND UNDERSTAND

1. The Age of the Mongols lasted from about ____ to ____ CE.
2. **Explain** why governments would commission official historical records to be created.
   A. They were required to by law.
   B. They did this to keep track of what was happening at the time.
   C. They created historical records so that generations to come will remember them.
   D. They did not commission records to be created.
3. **Determine** whether the following statements are True or False.
   a. Sources created at the time, such as paintings, would not be biased.
   b. A *paiza* was used as a form of identification to stop people from travelling through the Mongol Empire.
   c. China was known as the 'middle kingdom' in Europe.
   d. *The Secret History of the Mongols* was intended to be read by only the Mongolian peasant class.
4. **Suggest** why China was known as the 'middle kingdom' in the Middle Ages.
5. Objects such as weapons provide us with information about the Mongol people. **List** three everyday objects that provide us with information about the lives of the Mongol people from the Middle Ages.
6. **State** what type of artwork was produced during the reign of the Mongols.

ANALYSE AND APPLY

7. **Suggest** what lesson you believe was meant to be learned by the boys in **SOURCE 2**.
8. In **SOURCE 3**, the explorer Marco Polo describes a large battle.
   a. **Identify** what adjectives or phrases he uses to describe the khan and his forces.
   b. **Identify** what adjectives or phrases he uses to describe the khan's enemies.
   c. Whose side was Marco Polo on (if any), and **explain** how you can tell.
9. **SOURCE 1** is an example of an everyday object used by government officials. **Identify** what it tells you about the society in which they lived.
10. **Explain** what is depicted in **SOURCE 4**. **Explain** why an artist would create this scene.
11. **Determine** whether **SOURCE 5** is a primary or secondary source. **Explain** your answer.

EVALUATE AND COMMUNICATE

12. Using the sources in this lesson and what you have already read about the Mongol expansion, **suggest** why the Mongol Empire expanded so quickly during the thirteenth and fourteenth centuries.

Answers and sample responses for this topic are available online.

LESSON 10.3 What was China like before Mongol conquest?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the way that life changed for the imperial Chinese once the Mongols invaded.

Tune in

In the eleventh century, the city of Kaifeng, the capital of the Song **dynasty**, had a population of more than 1 million people.

SOURCE 1 An illustration created in the twelfth century of the beautiful city of Kaifeng

1. **Use SOURCE 1 to identify as many aspects of daily life in the Song dynasty as you can.**
2. **This scene depicts a market — can you identify the different people coming to this central meeting space? How is this similar or different to the life we live today?**

10.3.1 The Song dynasty

In the twelfth century, over 100 million people lived in the Song Empire, which covered 4 million square kilometres of land. In 960 CE, the first Song emperor, Taizu, took control by leading a rebellion. Instead of using military force, Taizu focused on building a strong government.

The Song dynasty's government included:

- **civil servants** selected through exams and interviews
- an imperial academy and university for training officials
- local governors and **magistrates**
- officials responsible for public opinion and problems
- taxes from trade and industry to fund government projects like irrigation
- regulation of prices in key industries such as the production of salt, tea and wine.

Life in the Song cities

Peace in Song-dynasty China led to a big population growth because farming improved, irrigation systems were rebuilt, and trade grew. Song city streets were busy with horses, mules, carts, **rickshaws** and **porters** carrying goods. People shopped at booths and stalls marked by tall posts and banners.

In the Song cities of Kaifeng and Hangzhou, the wealthy could buy exotic items like rhinoceros horn from Bengal and ivory from Africa. Street shops stayed open until 2 am. The tradespeople's stalls offered knife sharpening, pot mending, coffin making and tailoring. Crowds gathered to listen to fortune tellers, watch magicians and consult healers.

SkillBuilder discussion

Using historical sources

1. What can the fine silk robes of these wealthy Song women tell us about the social and economic status of women in the Song dynasty?
2. How might the role and expectations of wealthy women in Song society differ from those of peasant women?
3. Consider the setting and activities surrounding these women. What aspects of Song dynasty culture and daily life are reflected in this image?

DID YOU KNOW?

Anyone who wanted to appear before the emperor had to sink to their knees and knock their head nine times on the floor to show their obedience.

SOURCE 2 A group of wealthy Song women dressed in their fine silk robes

Song cities were built in the shape of a square and had thick defensive walls. People entered the city through guarded gates and walked down straight streets that crisscrossed from north to south and east to west. Houses were grouped into **wards**, enclosed by another protective wall that was locked every night. In cities teeming with people, the government was responsible for community health and hygiene. Garbage was regularly removed from the streets and transported on barges to dumps in the countryside. Every day the 'pouring men' came to cart away the city's human waste, which was dried and used as fertiliser for the local vegetable gardens.

10.3.2 Home and the Chinese family

Traditional life in China was in stark contrast to the life of the nomadic Mongol warriors. The Chinese way of life centred on agriculture. Every member of the Chinese peasant family was needed to work on farming tasks such as draining and ploughing fields, fertilising crops and irrigating. Most people living in traditional Chinese communities were bound to the land for their survival. Traditional Chinese culture emphasised a person's duty to their family, including dead ancestors who were continually honoured through religious rituals. Loyalty to the family was more important than loyalty to the government. The father was the head of the family and made all the decisions. Wives and children were expected to obey.

During the Song dynasty, China had many small villages where between 200 and 400 people lived in family cottages made from mud bricks. Chinese families also lived on boats, called sampans, along

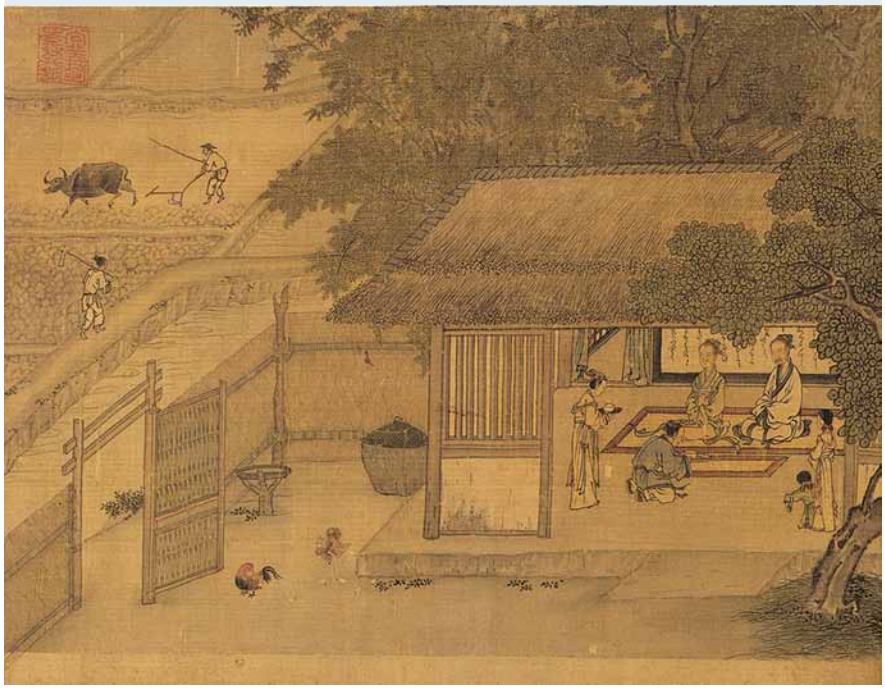
the busy waterways of the large river systems. Within the harbours of the port cities, thousands of boat people lived in floating villages. The strong Chinese family network provided security in a land where natural disasters like insect plagues, floods and droughts frequently destroyed harvests and homes.

SkillBuilder discussion

Historical significance

1. Look closely at **SOURCE 3.** What clues does this image give us about social order at the time?
2. Discuss the significance of your observations.

SOURCE 3 This Song dynasty painting shows a son kneeling submissively in front of his parents.



10.3.3 Song inventions and ideas

Many inventions and ideas have their roots in ancient China. From the fourth century CE, the western world was greatly influenced by Chinese developments such as those in the following table.

TABLE 1 Some of the inventions that originate in Ancient China

Invention	Purpose
The loom	Weaving silk
The compass	Establishing directions and distances
The breast strap harness and the foot stirrup	Horse riding
The stern post rudder	Steering ships
The wheelbarrow	Moving items
The blast furnace	Obtaining metals
The mechanical clock	To keep time and track the movements of the sun, moon and stars

The Chinese discovered that a combination of coal, saltpetre and sulphur would make gunpowder 300 years before the Europeans learned this knowledge from them. The Song dynasty leaders recognised the military usefulness of gunpowder and used it to set off fires and create frightening clouds of smoke. Song China defended itself against the Mongol army by hurling gunpowder grenades from catapults and shooting flaming arrows from thick bamboo tubes.

SkillBuilder discussion

Historical significance

1. How does the mechanism of the water-powered Song clock in Kaifeng work, and what purpose do you think the 14-minute 24-second rotation is for?
2. What is the significance of the water clocks like the one in **SOURCE 4**?
3. How does this ancient water-powered clock compare to modern timekeeping devices in terms of accuracy and technology?

SOURCE 4 A water-powered Song clock in Kaifeng. The wheel rotated every 14 minutes and 24 seconds, tipping water from one bucket into another.

SOURCE 5 A Song dynasty description of one of the uses of gunpowder

At the end-of-year festival ... there were many firecrackers ... there were fuses so arranged that when you lit one it set off hundreds of others ... [Some] fireworks ... were like wheels and revolving things, others like comets, and others again shooting along the surface of the water, or flying like kites ...

Spreading the word

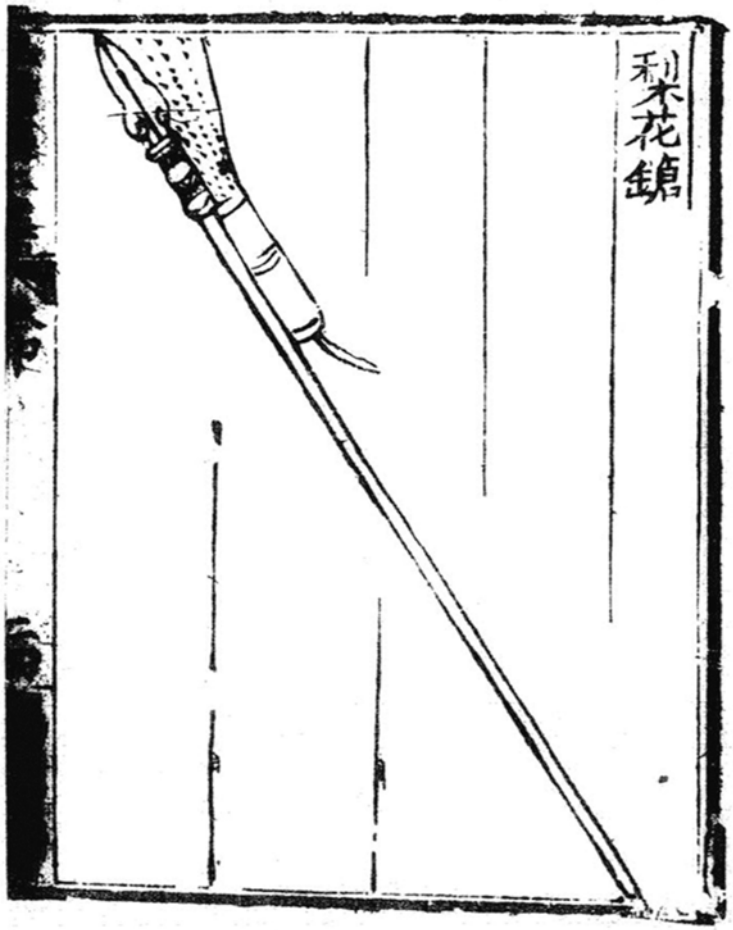
Printing began in China 700 years before it was shared with Europe. In 750 CE, sheets of paper were stamped with inked blocks of wood into which Chinese characters had been carved. It was a quick and easy process known as 'block printing'. By the ninth century, the blocks had become much larger and each could print a whole page.

Over the centuries, labour-saving methods of printing were developed. The Song dynasty printer Bi Sheng made characters out of clay and set them in a frame. These clay characters could then be removed and new characters arranged for printing the next page.

10.3.4 The dynasty crumbles

Despite its achievements, the Song dynasty was not strong in military power. Northern tribes, the Khitan and Jurchen, often raided Song territory. In 1004 CE, the Song agreed to give silver and silk to the Khitan for peace, but this failed. By 1120, the Song supported the Jurchen against the Khitan. The Jurchen won and then invaded the Song, who tried to use gunpowder weapons to defend themselves. The defence failed, and the Jurchen captured the Song capital in 1126, establishing the Jin dynasty.

SOURCE 6 An early form of a 'firelance', ancestor of the modern firearm. This illustration is from the *Huolongjing*, or *Fire Drake Manual*, a guide to gunpowder-based weapons from the thirteenth to fourteenth century.



The southern Song

The remaining Song leaders fled south and set up a new capital at Linán, now Hangzhou. This area was rich in agriculture. They built a navy and advanced military technology to protect themselves. The southern Song ruled for another 150 years, trading with other regions, until the Mongols became a greater threat.

10.3 SkillBuilder activity HISTORICAL QUESTIONS AND COMMUNICATING

1. **Select** one invention from the Song dynasty.
2. **Conduct research** to build your understanding on the invention. Make notes on the following:
   - What problems does this invention solve?
   - How could this invention be useful to others?
   - How does the invention work?
   - Any other information the buyer might like to consider.
3. **Create** a pamphlet advertisement that the creator could share with people at the time.

10.3 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 6	2, 4, 5, 9	7, 8, 10, 11, 12

REMEMBER AND UNDERSTAND

1. **Explain** how the Song emperors built their authority.
   A. Through establishing a dictatorship
   B. Through a strong civilian government
   C. Through the use of military
   D. Through fear and persecution
2. **Identify** the key features of the civilian government.
3. Explain why the population grew so rapidly in Song-dynasty China. **Select** all that apply.
   A. People were encouraged to expand their families.
   B. Farming techniques improved.
   C. Irrigation systems were rebuilt.
   D. Trade grew.
4. a. **Describe** how cities were designed.
   b. **Explain** how this helped protect the citizens.
5. **Identify** what work the traditional Chinese peasant did.
6. **Select** the elements that were combined to make gunpowder. **Select** all that apply.
   A. Coal
   B. Iron
   C. Saltpetre
   D. Sulphur
   E. Silicone

ANALYSE AND APPLY

7. **Discuss** what features of life in the Song cities are shown in **SOURCES 1** and **2**.
8. The Song dynasty was threatened by two powerful tribes called the Khitan and the Jurchen.
   a. **Explain** what saved the city of Kaifeng from being attacked by the Khitan.
   b. **Identify** what the consequence of this was for the Song imperial family.

EVALUATE AND COMMUNICATE

9. **Propose** what weaknesses there were behind the Song dynasty.
10. **Explore** the reasons that the Song dynasty created such a flourishing culture, which allowed for so much growth and creativity.
11. **Evaluate** the statement that China was way ahead of Europe in technology and culture during the Middle Ages.
12. **Suggest** what elements of the Song way of ruling a city can be found in Australian society today.

Answers and sample responses for this topic are available online.

LESSON 10.4 Who were the Mongols?

LEARNING INTENTION

By the end of this lesson you should be able to **discuss** what life was like for Mongolian people before the rule of the great khans.

Tune in

SOURCE 1 shows that the Mongolian people could take their home with them when they migrated.

SOURCE 1 A traditional Mongolian yurt was easily collapsed and transported.

1. **Consider your lifestyle:**
   - **If you had to move tomorrow, could you pack up your essential items?**
   - **How would a nomadic lifestyle impact the things you keep or value?**
2. **Examine the landscape around the yurt. How do you think this environment would force people to stay mobile and move to a new area regularly?**

10.4.1 The Mongol homeland

The Mongols were nomadic people from Mongolia, a cold and rough land north of China. Their homeland was bordered by the Altai Mountains to the west, the Gobi Desert to the south and Lake Baikal to the north.

The Mongols raised animals like cattle, goats, yaks and sheep on the vast grasslands. They used the animal wool for clothing and to line their yurts (tents). Sheep manure was used for fuel, and they made cheese and butter from milk. **Mutton** was a major part of their diet. Camels were used for desert crossings, oxen for heavy loads and horses for transport, hunting and warfare.

Every year, the Mongols moved from the open plains in summer to sheltered mountain valleys in winter. Their life was tough due to the harsh climate, so Mongol lands had few people. They traded or raided for grain, metals, textiles and tea from the settled people of China.

From 400 BCE, Chinese emperors built walls to defend against northern tribes' raids. Chinese people lived in river valleys, growing crops and building roads and cities. The Great Wall marked the boundary between the rich and sophisticated **imperial** China and the poor and simple nomadic Mongolia. The Chinese called the Mongols '**barbarians**'.

SkillBuilder discussion

Continuity and change

1. Look at **SOURCE 2**. Discuss the features of the yurt that make it suitable for a nomadic lifestyle.
2. Why do yaks thrive in Mongolia's harsh environment and why have they continued to be important to Mongolian people?

SOURCE 2 A modern-day image of a rural Mongolian valley where traditional Mongolian yurts and still used and yaks are raised in herds.

SOURCE 3 Mongolia lay to the north of China. The stark northern landscape was the home of people the Chinese regarded as barbarians. This Song dynasty illustration shows the Chinese view of the Mongol homeland as barren and harsh.

10.4.2 Mongol society

The Mongols lived in small clans. Groups of clans were bound together by marriage and blood relationships to form a Mongol tribe. A chieftain, or khan, governed the tribe. The khan was not born to rule, but kept the position of power through constantly proving personal strength and protecting the tribe. Within clan groups, the people belonged to a particular social class which determined everything, from what they were given to eat at a banquet to how they were armed and dressed when they went into battle.

The role of women

Mongol women had power, influence and considerable freedom because they managed daily life in the camp. Their tasks are listed in the following table.

Tasks of Mongol women
Herding and milking all the livestock
Making cheese, yoghurt and butter
Packing the yurt
Making felt by soaking and beating sheep fleece for winter insulation of the yurt
Raising the children
Cooking and sewing animal skins into warm winter clothing

Marriage ties were very important to Mongol tribal organisation. Marriages were arranged through discussion with clan leaders and were regarded as an important step into adulthood. Men were permitted to have many wives. Once married, a woman was responsible for her own yurt. The location of the yurt, in relation to the man's yurt, indicated seniority among the women. The first married wife placed her yurt to the east of her husband's and subsequent wives placed their yurts to the west. If the husband died, it was expected that the youngest son or brother would take care of the widow. Married women had particular status in Mongol society and were identified by elaborate headdresses.

SOURCE 4 An extract from a first-hand report written by European Giovanni da Pian del Carpini, who visited the Mongols between 1245 and 1247 at Pope Innocent IV's command

Girls and women ride and gallop as skillfully as men. We even saw them carrying quivers and bows, and the women can ride horses for as long as the men; they have shorter stirrups, handle horses very well, and mind all the property. The Tartar (commonly used term for Mongols) women make everything: skin clothes, shoes, leggings, and everything made of leather. They drive carts and repair them, they load camels, and are quick and vigorous in all their tasks. They all wear trousers, and some of them shoot just like men.

SkillBuilder discussion

Using historical sources

1. How does Giovanni da Pian del Carpini's description of Mongol women challenge the traditional gender roles of the time?
2. What skills and tasks did Mongol women perform that were typically associated with men in other contemporary societies?
3. In what ways did the skills and responsibilities of Mongol women contribute to the overall mobility and effectiveness of Mongol society and military campaigns?

Hunters and horses

Horses were the Mongols' most treasured asset. The herders and hunters of Mongolia spent their lives in the saddle. From childhood they were taught to hunt on horseback. This outdoor life gave the Mongols independence and mobility. Traditional hunting expeditions, called the *nerge*, also provided military training. By riding in a vast circular formation, Mongol riders gradually forced wild game such as deer and boars into a corral (enclosure). The hunt required great teamwork, skill and endurance. Mongol warriors were known to ride for days without rest, surviving on dried milk curd and the blood drawn from an incision into the veins on their horse's neck. The life that the Mongol nomads knew from birth created powerful warriors.

10.4 SkillBuilder activity HISTORICAL QUESTIONS

The Mongolian homeland was too cold and dry for growing crops. **Explain**, using examples from other cultures, how this led to the skills and lifestyle they needed to conquer many other lands. You might need to do some additional research on other contemporary cultures.

For example, there is evidence that the Vikings conquered other lands due to a lack of arable lands at home.

Guide your research by **investigating** the similarities and differences between the Mongols and the Vikings in terms of their:

- homelands
- culture
- weaponry
- enemies.

10.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 4, 5	1, 6, 7, 8, 9	3, 10, 11, 12

REMEMBER AND UNDERSTAND

1. **Name** the animals the Mongols used and **explain** why they used them.
2. **Explain** why the Great Wall of China was built.
   A. To keep the Chinese inside
   B. To become a tourist attraction
   C. To defend themselves from raids from the northern 'barbarians'
   D. As a symbol of China's strength
3. **Explain** why clan and family were so important to the survival of Mongol society.
4. The ruler of the clan was the chieftain, called the **khan** / **emperor**. Chieftains maintained power through personal strength and by protecting **the clan** / **punishments**.
5. **Determine** whether the following statements are True or False.
   a. Marriages in Mongol society were generally by choice, with no involvement of the clan leaders.
   b. The Mongols regarded the Chinese as 'barbarians'.
   c. Mongol women had no power, influence or freedom.
   d. Horses were extremely valuable to the Mongols in many ways.
6. **Discuss** what were the biggest differences between men and women in Mongol society.

ANALYSE AND APPLY

7. Using **SOURCE 1**, **explain** how the Mongolian yurt was perfectly created to work within the conditions in which the Mongolians lived.
8. Look closely at the landscape in **SOURCE 2**. **Suggest** what makes yaks so suited to their landscape.
9. **Describe** the elements in **SOURCE 3** that show the Song illustrator thought the Mongol landscape was harsh and barren.

EVALUATE AND COMMUNICATE

10. **SOURCES 1**, **3** and **4** give information about Mongolian life. Using these sources, **suggest** why the Chinese regarded their northern neighbours as 'barbarians'.
11. Imagine that you are interviewing a Mongol tribe member who has made the journey to trade with the settled agricultural people to the south of the Great Wall. Using the sources in this lesson as a basis, make a list of questions that you might ask to learn more about the journey and their wider life.

12. Referring to all the sources in this lesson, **describe** the Mongol people's relationship with:
    a. the land
    b. their animals
    c. the weather
    d. the imperial Chinese
    e. each other.

Answers and sample responses for this topic are available online.

LESSON 10.5 How did Temujin come to power?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** who Temujin was, and how the attributes he showed as a boy would dictate the type of leader he would become.

Tune in

There are no portraits from when Temujin was alive, so **SOURCE 1** is likely the most accurate depiction of him that we have, as it was commissioned by his grandson, Kublai, after his death. Kublai wished to make the most accurate portrayal possible.

Discuss some of the following questions:

1. **Why do you think Temujin didn't want images of himself? This was very unusual for the time.**
2. **Are there any challenges to understanding Temujin which come from not knowing what he looked like?**
3. **The man in the portrait looks very ordinary. Why do you think Kublai wanted such a simple version of his grandfather?**
4. **In the painting, the artist has depicted Temujin wearing white robes like a Mandarin sage. Why do you think this is?**

SOURCE 1 A painted silk portrait of Temujin, known to the world as Genghis Khan, made after his death

10.5.1 Early life

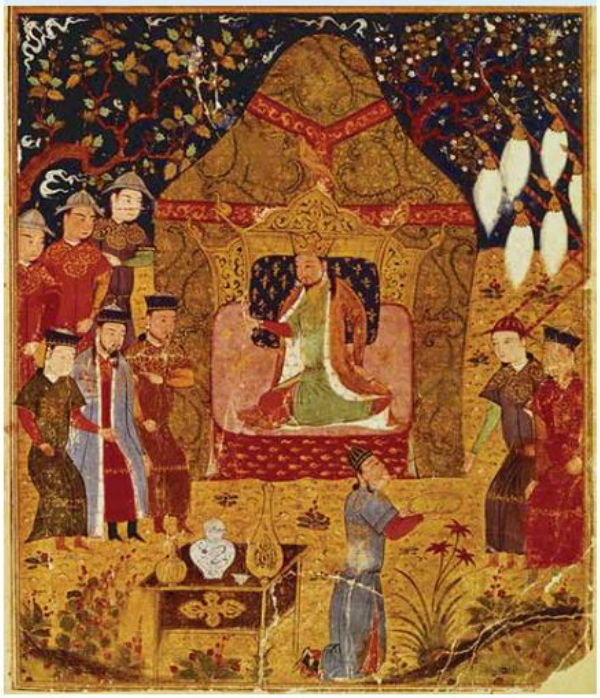
Temujin's early life is unclear, but he was likely born around 1162. His father, Yusegei, was a minor chieftain of the Borjigin clan, who was poisoned when Temujin was young. His mother, Yulun, taught him the skills of a warrior. The Mongols were divided into many tribes that often fought each other — a shaman named Teb-Tengri described their life as 'no respite, only battle'. Temujin learned to survive by mastering military strategy, diplomacy and negotiation.

10.5.2 The creation of a khan

By his twenties, Temujin had built alliances with other Mongol clans and built a reputation as a ferocious warrior. He became a tribal chief in 1189 and was elected as Genghis Khan, 'the universal ruler', in 1206. To strengthen the bonds between the tribes, he used three ties:

- *Quda* — tie of marriage. He married off his daughters to rival tribes to create alliances.
- *Anda* — tie of sworn brotherhood. He exchanged valuables to form bonds stronger than family ties.
- *Nökör* — tie of friendship. Followers promised to obey and defend their leader.

SOURCE 2 When a new camp was established, the khan's tent was the first to be erected. In this image, created in the fourteenth century, the khan is surrounded by his court officials. In the trees outside, the yak tails hang as a symbol of the presence of the khan.



Genghis Khan commanded loyalty and was willing to take criticism from others, including his mother, who became one of his advisers. He was known for his impressive physical strength, endurance and skill in archery and horseback riding, which helped him gain the respect of his followers. Under his leadership, the Mongol tribes united through strategic alliances and military conquests. His first military victory as ruler was against the Tanguts of Xi Xia, who lived south of the Gobi Desert and chose to pay tribute instead of fighting. This victory gave him control over part of the Silk Road and direct access to China, increasing Mongol wealth and expanding their influence over trade networks. Genghis Khan was also known for his tolerance of different religions and openness to new ideas, often incorporating foreign administrators and advisers into his growing empire.

SkillBuilder discussion

Historical significance

1. What significance might the khan's tent being the first to be erected have in terms of Mongol leadership and authority?
2. How does the presence of court officials around the khan in the image reflect the political structure and governance of the Mongol Empire?
3. Why do you think yak tails were used as a symbol of the khan's presence, and what might this signify about Mongol culture and symbolism?

SOURCE 3 Genghis Khan met with a Taoist holy sage, or holy man, in 1221. The record of his conversation with Ch'ang-Ch'un presents a different image of the Great Khan.

I hate luxury and exercise in moderation [the Khan wrote]. I have only one coat and one food. I eat the same food and am dressed in the same tatters as my humble herdsmen ... In the space of seven years I have succeeded in accomplishing a great work, uniting the whole world in one empire. I have not myself distinguished qualities ... But as my calling is high, the obligations incumbent on me are also heavy and I fear that in my rule there may be something wanting. To cross a river we need boats and rudders. Likewise we invite sages and choose assistants to keep the empire in good order ... I implore thee to move thy sainted steps. Do not think of the extent of the sandy desert. Commiserate with the people in the present situation or have pity upon me and tell me the means to preserve life.

10.5 SkillBuilder activity HISTORICAL QUESTIONS AND USING HISTORICAL SOURCES

Using the internet or your library, **research** the importance of the Silk Road and answer the following questions.

a. **Explain** who built the Silk Road and why.
b. **Explain** where the Silk Road was and what travelling conditions were like on the road in the thirteenth century.
c. **Explain** the road's strategic importance to Genghis Khan.
d. **Name** some of the products and ideas that were transported via the Silk Road in the days of the Great Khan.

10.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4, 7, 12	6, 8, 9, 10, 11

REMEMBER AND UNDERSTAND

1. Temujin was a member of the **Borjigin** / **Oirat** / **Quda** tribe.
2. **State** whether the following is True or False.
   When Temujin was a boy, the Mongols were at peace.
3. In his early life, Temujin displayed impressive physical characteristics and skills. **State** what they were.
4. **State** how Temujin gained the title *Genghis Khan*. **Explain** what it means.
5. **State** in what ways Genghis Khan showed great leadership. **Select** all that apply.
   A. He was an effective military leader.
   B. He did not require any advice from his mother or companions.
   C. He commanded loyalty from his companions and obedience from his soldiers.
   D. He accepted criticism.
   E. He showed tolerance for other religions and openness to ideas from others.
6. **State** what Genghis Khan gained from his first military victory as the universal ruler. **Explain** why it was so important.

ANALYSE AND APPLY

7. **Identify** how **SOURCE 2** visually recognises the khan's great power.
8. **State** how long Genghis Khan had been the universal leader by the time the conversation in **SOURCE 3** took place.
9. The Yuan dynasty was established by Genghis Khan's grandson Kublai Khan.
   a. **State** whether **SOURCE 3** is a primary or secondary source.
   b. **Explain** why they would want to establish a fierce reputation for Genghis Khan.
10. **State** which source in this lesson you think is the most reliable. **Explain** your answer using evidence.

EVALUATE AND COMMUNICATE

11. **Explain** the terms *quda, anda* and *nökör* in your own words. **Describe** how these terms were used to create strong bonds between the Mongolian tribes who became a great force in the region.
12. **Suggest** what aspects of the Mongol life the khan drew on to create a superior warrior force.

Answers and sample responses for this topic are available online.

LESSON 10.6 How did the Mongols conquer the world?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** what aspects of the Mongols' military made them a force to be reckoned with, and the tools that Genghis Khan used — both military and diplomatic — to keep his army in line and on the same page.

Tune in

Mongol riders could turn and shoot arrows from their composite bow with great accuracy and speed. The composite bow was made from combining a layer of **sinew**, wood and horn to create the frame.

SOURCE 1 Mongolian archers take aim while riding horses, displaying the same skills as Genghis Khan's warriors.

How would a group of warriors such as the one in **SOURCE 1** be an effective fighting force during this period? Compare them to non-mounted soldiers from other nations and discuss the differences.

10.6.1 Mongol soldiers

Genghis Khan's fierce army, made up of Mongol tribes, invaded China in 1211. Their swift horses allowed them to cover great distances quickly. Even in winter, when frozen lakes and rivers became their highways, the Mongols excelled in battle due to their exceptional discipline and toughness.

TABLE 1 The common weapons and equipment carried by Mongol soldiers

Weapon/equipment	Description
Lance	Fitted with a hook for pulling enemies from horses
Curved sword and dagger	Sword for combat, dagger strapped to the arm
Two bows	One for horseback, one heavy bow for foot use
Shield, iron helmet and leather armour	Armour waterproofed with lacquer

The Mongol horse, short and sturdy, was key to the army's success. These horses could survive harsh winters and needed minimal care. Each soldier had about five horses to ensure they could continue travelling while some horses rested. Mongol warriors were known to stay in the saddle for up to ten days, surviving on raw meat if necessary. Their reputation for discipline and strength spread fear across Asia and Europe.

10.6.2 Military structure and discipline

Mobilising an army

The Mongol tribal organisation developed military strength. Even in peacetime all able-bodied men between 15 and 60 years of age were under military orders, meaning that they could be called upon to fight. Promotion in the Mongol army was not related to high birth, but achieved as recognition for bravery and skill. The Mongol army was reformed and reorganised into a decimal system under Genghis Khan. It was composed of:

- *arban* — a group of ten men from different Mongol clans, ordered to be loyal to each other regardless of clan connections
- *zuun* — a company, consisting of ten *arban* (100 soldiers)
- *myangan* — a battalion, consisting of ten *zuun* (1000 soldiers)
- *tumen* — an army, consisting of 10 *myangan* (10 000 soldiers).

The tribal links of the clan groups were broken up by the army structure to ensure old loyalties could not threaten Mongol unity. In battle, the close-knit and tightly drilled units used skills developed in the traditional Mongol hunt, encircling, trapping and then cutting the enemy to pieces. The use of **couriers** enabled the various sections of the Mongol armies to keep close contact with each other.

Death and duty

One of the key features of the Mongol army was strict discipline, called Yassa. This meant following rules for every situation and having penalties for all crimes. Genghis Khan, who couldn't read or write because Mongol society didn't have **literacy**, adapted the Uyghur script to have these rules written down. During wartime, desertion, failing to rescue captured friends, plundering without permission, sleeping on duty, fighting with other groups in the army, and showing unnecessary kindness to captives were all punishable by death.

SOURCE 2 Genghis Khan declared in the Yassa that, 'If the military leaders, and the leaders of the many descendants of the ruler who will be born in the future, should not adhere strictly to the Yassa, then the power of the state shall be shattered and come to an end.' Although a complete list of the laws has never been found, it is believed that they covered all aspects of public and private life. The Yassa was of particular importance to the discipline and structure of the army.

- The army will stay organised in groups of ten, one hundred, one thousand, and ten thousand. This helps raise an army quickly and keeps command clear.
- Before a campaign starts, soldiers must get their weapons from their officer, keep them in good condition, and have them checked before battle.
- No one can take anything from the enemy unless the general allows it. After permission is given, soldiers can keep what they take if they pay a share to the khan's representative.
- Soldiers will practise skills in a big winter hunt. No one can hunt deer, hares or some kinds of bird from March to October.

10.6.3 Conquering the world

Mongol military campaigns were well planned. They learned new battle strategies from their enemies, such as siege machines and gunpowder from the Chinese and Persians. They used catapults and smoke grenades in battles.

People in the path of the Mongol army had to choose: surrender and live, or resist and die. If a city rebelled after surrendering, the population was killed and the city was destroyed. The Mongols used terror as a weapon, spreading stories of their conquests to frighten others into surrendering.

Genghis Khan began his invasion of China by attacking the Jin people in northern China and Manchuria. In 1213, the Mongol armies broke through the Great Wall of China and conquered the Jin capital city of Yanjing within two years. So many people were killed in northern China that it was said white hills made of bones appeared.

SOURCE 3 Mongols used more than just their advanced horseback tactics. They laid siege to larger cities with up to 300 000 warriors across their empire and used complex devices such as the trebuchet, shown in this depiction of a thirteenth-century attack.

SkillBuilder discussion

Historical significance

The trebuchet was an important innovation in weaponry to the Mongols. Discuss the significance of this innovation to Mongol expansion.

10.6.4 The empire after Temujin

In 1227, Genghis Khan died within eight days of leaving for a campaign in China. His cause of death is unknown, and his son Ögedei became *khagan* ('great khan') in his place. He continued to conquer new lands but brought far more stability to the regions his father had invaded.

In 1268, the Mongols launched their second colossal invasion of China. Mongol forces were now led by Genghis Khan's grandson, Kublai Khan. Kublai Khan's army **blockaded** the Yangtze River and began advancing on the cities of the southern Song. The Song were well defended with their modern gunpowder weapons, such as rockets and flamethrowers. The Mongol armies changed their fighting tactics and surrounded the great walled Song cities, cut off supplies and starved them. For four years the **sieges** continued until the Mongols were victorious. Every Song city that fought against the Mongols was destroyed. The only chance for survival was unconditional surrender.

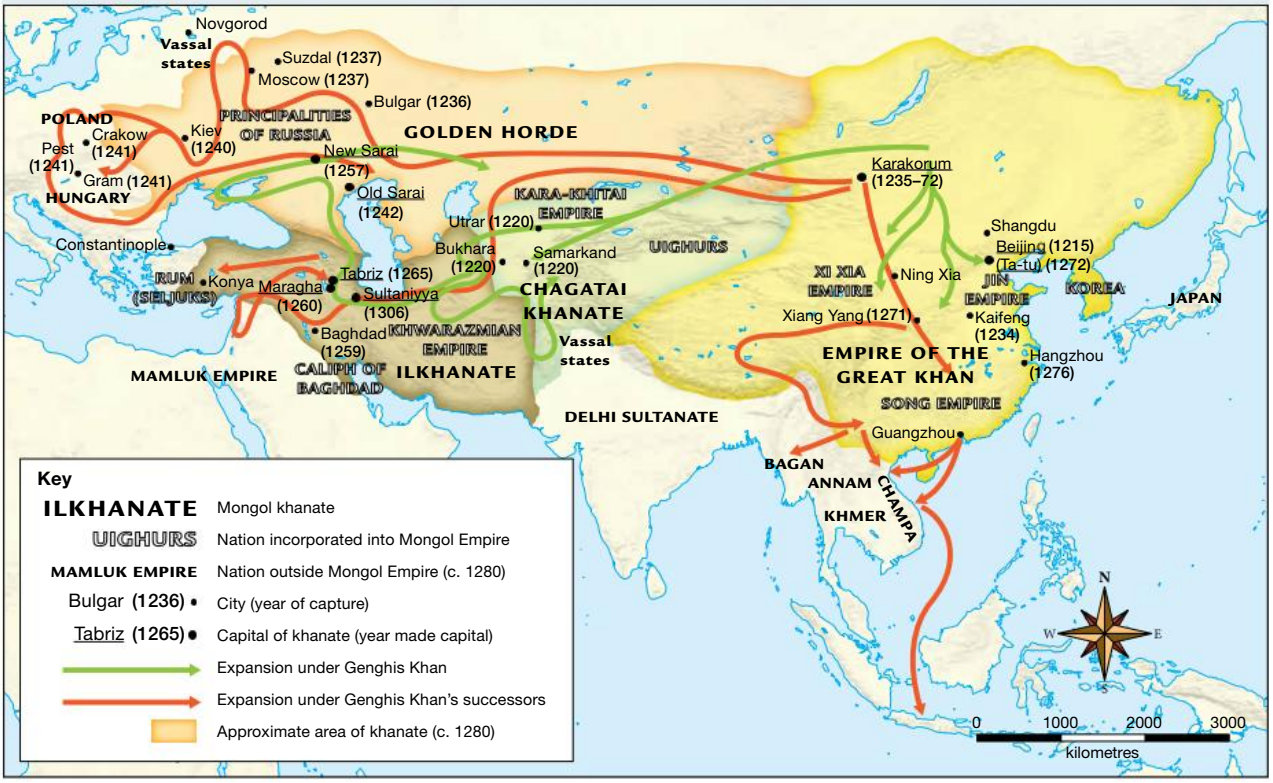
By the end of the fourteenth century, the vast empire was divided into four Mongol kingdoms:

- Kublai Khan ruled China — the Yuan dynasty.
- Hulegu ruled Persia — the Ilkhanate.
- Batu Khan ruled southern Russia — the Golden Horde.
- Chagatai ruled Central Asia — the Chagatai Khanate.

The closing defeat of the southern Song came in 1276. The Mongols again used their siege tactics to destroy the Song navy. For two weeks they encircled the Chinese fleet and blocked all supplies. With the last Song forces weakened, the Mongols attacked on a morning shrouded in rain and fog. Mongol victory was swift.

Among the thousands of Chinese who died on that day was the last Song emperor, a child named Bing, and his empress mother. Mongol victory was complete when Kublai Khan declared himself the first foreign emperor of China. By this time, the Mongol army had conquered territory stretching from the Arctic Ocean to the Persian Gulf and from Hungary to Korea.

SOURCE 4 A map of the Mongol Empire near its peak in 1280



Source: Map drawn by Spatial Vision

SOURCE 5 Despite the Mongol army's domination of much of Asia, attempts to conquer Japan failed, as shown in this nineteenth-century Japanese woodcut. In both 1274 and 1281, Mongol invasions were thwarted by a combination of resistance from Japanese warriors and destructive typhoons, which shattered the Mongol ships and killed many thousands of the Mongol invaders.

10.6 SkillBuilder activity COMMUNICATING

1. **Create** a timeline of the history of Mongol expansion, beginning with the conquest of the Jin.

   Leave enough room so that, as you learn more about the creation of the Mongol Empire, you can continue adding details of events and personalities to your timeline.

   Make sure to include the following in your timeline:
   - Key events
     - The year the event took place
     - The era (such as the dynastic period)
   - Key personalities
     - Mongols
     - Others (e.g. Marco Polo, Chinese individuals, etc.)
   - A brief description summarising why the event is important

   Keep in mind that the timeline is a summary of major events and personalities (less is more); you do not need to include everything you have learnt.
2. Cultures outside of Mongol rule considered them to be 'barbarians'. **Write** an explanation supporting or refuting this claim using evidence from this topic.

10.6 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 3, 5	1, 4, 6, 9	7, 8, 10

REMEMBER AND UNDERSTAND

1. Briefly **describe** the weapons carried by a Mongol soldier.
2. Each Mongol soldier took **one** / **two** / **three** / **four** / **five** horses along on campaign. This allowed them to give a horse **two** / **three** / **four** days of travel without a rider. This way they could keep travelling for long distances while not wearing out their horses.
3. **Identify** the basis for promotion in the Mongol army.
   A. Social class and wealth
   B. Age and experience
   C. Recognition of skill and bravery
   D. Promotions were not given.
4. **Explain** why the tribal links of the clans were broken up by the army structure.
5. **Explain** how the different sections of the army communicated during a battle.
   A. Communication was not possible.
   B. Leaders would move between sections.
   C. Communication was carried out through couriers.
   D. Soldiers would move between sections when they felt necessary.
6. Refer back to section 10.6.2.
   a. **State** what the Yassa was. **Explain** what script it was written in.
   b. **Explain** why Genghis Khan didn't just use his own language for the Yassa.
   c. **Explain** why Genghis Khan had the Yassa developed.

ANALYSE AND APPLY

7. **Analyse** the laws outlined in the Yassa in **SOURCE 2**.
   a. **Explain** what was the benefit of dividing the army into tens, hundreds, thousands and tens of thousands.
   b. **State** whose responsibility it was to hand out the arms to the soldiers.
   c. **Explain** whether the soldiers are allowed to pillage (rob violently) the enemy at all.
   d. **Explain** how Genghis Khan kept his armies fit during winter.
8. The Mongol Empire continued to expand after the death of Genghis Khan. **Examine SOURCE 4**, which depicts the expansion of the Mongol Empire.
   a. **State** how far west Genghis Khan's campaigns went.
   b. **State** which three Asian empires were conquered by the Mongols.
   c. **Identify** what city was at the centre of the Mongol lands.
   d. **Identify** three modern-day countries which were once part of the Mongol Empire.
   e. **State** what region was the focus of Kublai Khan's campaign and empire.

EVALUATE AND COMMUNICATE

9. Using the illustration in **SOURCE 5**, as well as the information in the caption, **explain** why the Mongols' attempt to conquer Japan was unsuccessful.
10. Based upon what you now know about the Mongol army's strategy, **write** two short accounts of one of the final battles before the fall of the southern Song stronghold during the siege of 1276. The first should be written from the perspective of a member of the Song royal family and the second from the perspective of a Mongol warrior.

Answers and sample responses for this topic are available online.

LESSON 10.7 What was China like under Mongol rule?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **describe** the reign of Kublai Khan as the first Mongol emperor of China (the Yuan Dynasty)
- **describe** the growth of Chinese culture during this time.

Tune in

As emperor, Kublai Khan placed the whole of China under Mongol control.

SOURCE 1 A thirteenth-century painting of Kublai Khan, the first emperor of the Yuan dynasty

Compare the character in **SOURCE 1** with the painting of Genghis Khan (**SOURCE 1**, lesson 10.5). These two figures are very similar — why do you think this is?

10.7.1 Yuan government

Now the emperor of China, Kublai Khan named his new dynasty Yuan, meaning 'creative force'. He moved the capital to Beijing and created a government that mixed Mongol and Chinese traditions. This made a state that was bilingual, multicultural and tolerant of different religions.

Kublai Khan invited Confucian scholars to help govern and set up a General Secretariat of 14 officials to enforce laws and ensure efficient rule. The people of China were divided into four classes:

- Mongols were the elite, holding top government jobs; they didn't pay taxes and they owned large estates worked by Chinese peasants.
- Non-Chinese allies and **mercenaries** served as government officials across the empire.
- Northern Chinese included Khitan, Jurchen and Koreans.
- Southern Chinese were former subjects of the Song dynasty.

Northern and southern Chinese had fewer rights, faced harsher punishments, couldn't gather in public and paid high taxes to support the Yuan government.

SOURCE 2 The coat worn by the emperors showing the 12 symbols of power in China

The 12 symbols and their meaning

- **A** *Moon* — heaven and enlightenment
- **B** *Fu* — justice
- **C** *Water weed* — purity
- **D** *Constellation* — heaven and enlightenment
- **E** *Axe* — punishment
- **F** *Cups* — respect for parents
- **G** *Sun* — heaven and enlightenment
- **H** *Dragon* — adaptability
- **I** *Fire* — brilliance
- **J** *Mountains* — earth and protection
- **K** *Pheasant* — literary achievements
- **L** *Grain* — abundance for the people

SkillBuilder discussion

Using historical sources

1. What do the 12 symbols on the emperor's coat represent, and how do they reflect the values and beliefs of ancient Chinese society?
2. How did the use of these symbols on the emperor's coat signify his authority and divine right to rule?
3. Can you identify any similarities or differences between the symbols on the emperor's coat and symbols of power in other cultures?

10.7.2 Rebuilding China

Millions of workers were set the task of rebuilding China after decades of Mongol war and conquest. Transport links were constructed with thousands of kilometres of roads and a Grand Canal was built linking north and south China. To protect against possible famine, **granaries** were built throughout the empire. Kublai Khan built schools, hospitals and orphanages, and established a regular postal service connecting every corner of his kingdom.

The khan also sent explorers to map China's great river systems and record the geography of the vast land. This encouraged merchants to journey overland to the Middle East and South-East Asia, and eventually led to the development of trade links with Europe.

SOURCE 3 Despite the positive achievements of the Yuan dynasty, the population of China plummeted due to the harsh conditions imposed upon it by Mongol rule. This Yuan dynasty painting by a Chinese artist shows death luring a baby away from his sister. His mother is powerless to save him.

In 1269, Kublai Khan established a printing office so that pamphlets could be published to communicate government decrees to the people. He also encouraged the printing of books on a wide range of subjects including agriculture, law, medicine, mathematics, art and history. Yuan dynasty printing presses were so widespread that books were mass produced and cheap to buy. Paper money was printed with such success that, for the first time in human history, paper money became the main form of currency.

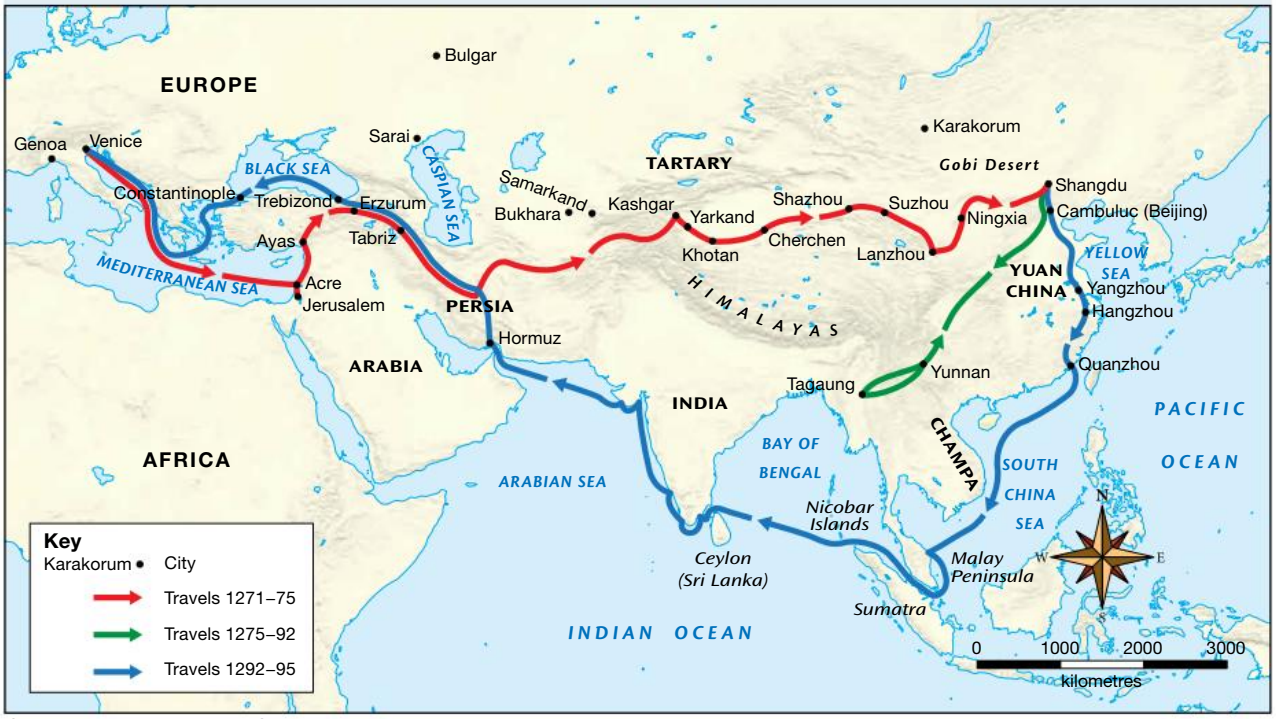
Kublai Khan built himself a magnificent palace on the site of the ancient city of Chung-tu, and a summer palace in Mongolia in Xanadu.

10.7.3 Westerners in the khan's court

Kublai Khan was fascinated by two brothers, Nicolo and Maffeo Polo, who visited his court to trade goods from their homeland of Venice, Italy. They arrived in 1266 and took messages from the khan, requesting missionaries and European scholars, back to the pope in Venice. When they returned to the khan, they were accompanied by Nicolo's son, Marco.

Marco Polo quickly became trusted by Kublai Khan and became his emissary to India and Burma. He travelled extensively in South-East Asia and, upon his return to Italy, shared his stories with a writer who turned them into the book *The Travels of Marco Polo*. At the time, they were both imprisoned by enemies of Venice, whom Marco fought against.

SOURCE 4 Polo's work for the khan would take him around Asia and Europe and through many of the lands conquered by the Mongols.



Source: Map drawn by Spatial Vision.

SOURCE 5 In *The Travels of Marco Polo*, experiences are often 'larger than life', leading to claims by many people that the book was more fiction than fact. Some people have even claimed that Marco Polo never made it to China.

... I will tell you another very wonderful thing; for there are men in this kingdom who have tails like dogs, larger than a palm, and who are covered with hair. They remain in the mountains, never visiting the towns. There are unicorns, with various beasts and birds for hunting.

SkillBuilder discussion

Using historical sources

1. Identify the element in the description from *The Travels of Marco Polo* that makes it seem more like a fictional tale rather than a factual account.
2. Marco Polo's contemporaries had doubt about his travel stories. What aspects of his accounts would have contributed to such disbelief?

How much of *The Travels of Marco Polo* is true was questioned by people in the fourteenth century but, even on his deathbed at the age of 70, the intrepid explorer insisted that *The Travels* was a true account of his experiences. When asked by a priest to retract his 'fables', Marco Polo said, 'I have not told half of what I saw'.

Whether the stories were true or not, what cannot be questioned is Marco Polo's influence on the popular imagination of the day. When Christopher Columbus set off to find China more than a century after Polo's death, he carried a copy of the book with him. To Columbus, as to many others, Marco Polo was both inspiration and guide.

DID YOU KNOW?

The travels of Marco Polo were known as *Il Milione* ('The Million' in Italian) and were sometimes referred to as 'The Million Lies' because his descriptions of the wonders of the East were considered so unbelievable by some that they were seen as huge exaggerations or outright fabrications.

10.7 SkillBuilder activity **CHRONOLOGY**

1. Using the sources and information in this lesson, make a **list** of the journeys and events in the life of Marco Polo.
2. **Construct** a timeline using your list.
3. **Illustrate** it using images from the internet or hand drawings if you can.

10.7 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 5	4, 6, 7, 11	2, 8, 9, 10, 12

REMEMBER AND UNDERSTAND

1. Kublai Khan gave the name **Qin** / **Song** / **Yuan** to his new dynasty, which meant **'creative force'** / **'bright light'**.
2. **Consider** the people of China.
   a. **Identify** the different groups or classes of people in the population of China at this time.
   b. **Explain** whether they were treated equally.
   c. **Explain** why the Chinese were treated more harshly than non-Chinese.
3. **Explain** why China needed rebuilding at this time.
   A. China had experienced decades of war and conquest waged by the Mongols.
   B. China wanted to begin an architectural revolution.
   C. The emperor demanded it.
   D. China did not need rebuilding.
4. **Summarise** the main achievements of Kublai Khan in reconstructing and rebuilding Chinese society.
5. Kublai Khan's winter palace was in **Tai-du** / **Chung-tu** / **Xanadu** / **Yanjing**.
6. **State** how long Marco Polo was in China for and **explain** the circumstances under which *The Travels of Marco Polo* were written.

ANALYSE AND APPLY

7. **Describe** how **SOURCE 1** portrays Kublai Khan. **Consider** whether the painter was trying to show him in a good light or not. Explain your answer.
8. **Examine SOURCE 2**. From what you know of Kublai Khan's achievements in rebuilding China, **suggest** which of the 12 symbols he would have valued and why.
9. **Examine SOURCE 3** carefully.
   a. **Explain** what comment the artist is making about life in Yuan China.
   b. Given that Kublai Khan put so much effort into rebuilding China, **explain** why you think the artist might feel like this.

EVALUATE AND COMMUNICATE

10. **Identify** which of Kublai Khan's achievements in rebuilding China would have had the most impact on the people. **Explain** why you think this.
11. **Identify** which aspects of **SOURCE 5** are beyond belief.
12. Based upon what you know of Kublai Khan, **discuss** whether he would have been happy with the publication of *The Travels of Marco Polo*. **Explain** your answer.

Answers and sample responses for this topic are available online.

LESSON 10.8 What was the Yuan court like?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** what life was like within the court of Kublai Khan.

Tune in

Regardless of their own beliefs, Kublai and his descendants made very public shows of honouring and preserving Chinese culture, such as the Guozijian, shown in **SOURCE 1**.

The Guozijian was built shortly after Kublai's death as a space to give offerings to Confucius and keep his ideas alive.

What do you believe the Mongol rulers were trying to show the citizens of China?

SOURCE 1 The Guozijian located in Beijing, China

10.8.1 Honouring China's heritage

During the Yuan dynasty, Kublai Khan's court was a place for political, artistic, philosophical and religious discussions. To keep the empire stable, the khan balanced Chinese and Mongolian cultures.

The role of women

Royal women influenced the empire. Kublai Khan's wife, Chabi Khatun, promoted Tibetan Buddhism, leading many Mongols to convert. His mother, Sorghaghtani Beki, encouraged him to learn about Chinese beliefs to better rule the people. Kublai invited scholars and religious leaders to his court to discuss important topics, helping Chinese culture thrive during his rule.

10.8.2 The Path to enlightenment

By the time of the Song dynasty, three main beliefs were common in China:

- Confucianism — developed by Confucius, this philosophy valued honesty, morality, loyalty, self-sacrifice, love and good manners. It also taught people about their roles in society.

- Daoism — based on Laozi's teachings, this philosophy stressed living a simple life and respecting nature. Daoism became a religion with temples and priests, and taught people to improve society by understanding their place in nature.
- Buddhism — this religion came from India and emphasised giving up material possessions to achieve enlightenment, offering hope for life after death.

10.8.3 Art and culture

In Chinese culture, painting, poetry and calligraphy were called the 'three perfections'. Artists aimed to express peace and beauty. Chinese art used symbols, such as the following:

- The butterfly represented the human spirit or joy.
- The chrysanthemum stood for courage.
- The orchid symbolised purity.
- The bamboo represented scholars.
- The crane symbolised a long life and happiness.

SOURCE 2 Huang Gongwang was the oldest of the four painters known as the Masters of the Yuan dynasty. This painting shows the Fuchun Mountains to which he retired after serving briefly in the Mongol administration.

With Kublai Khan's encouragement, Chinese writers, painters and calligraphers recorded the history of the earlier Tang, Jin and Song dynasties. Although many Chinese artists agreed to work for their Mongol emperors, some expressed their true feelings about the Mongol **occupation** of China through art and literature.

The most highly regarded painters of this period were known as the *literati.* These scholarly Chinese artists turned away from depicting everyday life in China and concentrated on painting landscapes. Rather than painting images designed to please their audience, they sought to depict nature as *they* experienced it, a practice that would influence generations of artists to come.

10.8.4 Visiting the court of Kublai Khan

Kublai Khan's palace was a vibrant place full of visitors from around the Mongol Empire and beyond its borders. The khan was attended by religious and political advisers, and encouraged the free exchange of ideas. Although the court was multicultural and was tolerant of its members practising different religions, it still had its share of conflict.

SOURCE 3 A modern artist's impression of the court of Kublai Khan

A. Foreign dignitaries were welcome at the court of Kublai Khan. Such visits were an opportunity to increase trade between the East and the West.

B. Under the rule of Kublai Khan, Tibetan Buddhism thrived and became one of the official religions of the Yuan dynasty.

C. Women who were close to Kublai Khan were encouraged to engage in political discussions during his rule. His mother and wife were particularly influential.

D. Confucianists, some of whom had advised the Song, were invited to the khan's court. Xu Heng was a well-respected Confucianist and educator, and was appointed the first leader of the dynasty's National Academy in 1271.

E. The court was filled with poets, artists and calligraphers, whose work was displayed for all to see. Influential poets included Zhang Yanghao, who challenged government policies, and Huang Gongwang, who was one of the four great painters of the Yuan dynasty. After retiring to the mountains, he spent three years painting one scroll.

F. Diet was of great importance. It was believed many diseases could be cured or prevented through diet alone. Assorted foods that may have been eaten included duck, chicken, fish, rice and vegetables.

G. In the thirteenth century, the court of Kublai Khan regularly saw high-level meetings between the Mongolian ruling class and dignitaries from around the world. Through these meetings, ideas flowed into China, while tales of the now-famous emperor spread all over the world.

H. During the Yuan dynasty, there were many debates between Daoists and Buddhists at the khan's court. After losing a debate in 1281, Kublai Khan ordered many Daoist texts to be burned.

SkillBuilder discussion

Using historical sources

1. List the elements in the picture that suggest that Kublai Khan's court was a place of cultural and intellectual exchange.
2. How does the artist convey the vibrancy and diversity of the court through colour and composition?
3. Can you identify any specific figures or symbols in the picture that might represent important aspects of life at Kublai Khan's court?

10.8 SkillBuilder activity HISTORICAL QUESTIONS AND USING HISTORICAL SOURCES

Using the internet and/or your library, **research** one of Confucianism, Daoism or Tibetan Buddhism and answer the following:

a. **Explain** how and where this belief system began.
b. **Explain** when and how it entered China.
c. **Suggest** why it might have appealed to the people of China during this time period.
d. **Explain** how its teachings may have guided Kublai Khan in ruling over the Chinese people.

10.8 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	5, 6, 9	4, 7, 8, 10

REMEMBER AND UNDERSTAND

1. Consider the influence of the women in Kublai Khan's life.
   a. **Sorghaghtani Beki** / **Chabi Khatun** / **Huang Gongwang** was Kublai Khan's wife.
   b. Kublai Khan's wife's support of **Tibetan leaders** / **warriors** / **monks** encouraged many members of the court to convert to **Tibetan rule** / **Buddhism** / **armies**.
   c. Kublai Khan's mother was **Sorghaghtani Beki** / **Chabi Khatun / Huang Gongwang**.
2. **Identify** the three main religious traditions shared by the Chinese people during the Song dynasty.
   A. Judaism
   B. Confucianism
   C. Daoism
   D. Buddhism
   E. Christianity
3. **Identify** the 'three perfections'. **Select** all that apply.
   A. Song
   B. Painting
   C. Dance
   D. Poetry
   E. Calligraphy
4. **Suggest** what the poets, painters and calligraphers aimed for in their work.
5. **Explain** who the *literati* were and what they did.
6. **Suggest** why Kublai Khan's court was a vibrant and exciting place to be.

ANALYSE AND APPLY

7. **Explain** how the artist of **SOURCE 2** can be seen as a member of the *literati* from this painting.
8. Use **SOURCE 3** to **explain** where there might have been possible sources of conflict within the court, despite its multiculturalism and political stability.

EVALUATE AND COMMUNICATE

9. Consider the court of Kublai Khan.
   a. **Describe** how the court of Kublai Khan was different from the courts of the past.
   b. **Identify** what was still the same, or similar.
10. **Determine** whether it is fair to describe Kublai Khan's rule as an 'occupation' of China. **Discuss** why or why not.

Answers and sample responses for this topic are available online.

LESSON 10.9 Was there peace under Mongol rule?

LEARNING INTENTION

By the end of this lesson you should be able to **identify** which aspects of the Mongol expansion led to relatively short-term change compared to those that led to longer-term change within Chinese society.

Tune in

Almost all traders during this period would be travelling in 'caravans', large convoys of traders and craftspeople who travelled together for safety. They would stay at caravanserai like the one shown in **SOURCE 1**.

Before setting out on their journey, what decisions do you think they made about:

- provisions such as food and water
- the animals they chose for different terrain (desert, mountain, etc.).

SOURCE 1 Selim Caravanserai was a resting point for traders along the Silk Road. It was built in 1332 and demonstrates the growth of Mongolian technology from their nomadic roots. Many of these caravanserai were built to give traders shelter along their travel.

10.9.1 Pax Mongolica

The rule of the khans led to a period in the thirteenth and fourteenth centuries of relative peace across their realm. This peace, referred to later by western scholars as *Pax Mongolica* (the Mongolian peace), broke down the walls separating the great civilisations of Europe from those in the Middle East and Asia. With peace ensured by the Mongols from Europe to the far east, traders could move freely and share ideas and goods from across the continent.

This, combined with the Yassa (Great Law) which punished wrong-doers and ensured religious freedom for all, made the four khanates an ideal space for many cultures to grow and thrive. European merchants

could now make the long journey to the Far East and trade routes were further developed, including the planting of trees along major routes to provide shade for travellers.

As people and their trade goods moved back and forth across the Eurasian world, they brought with them skills and understanding. European travellers to China brought goods such as silver, fine cloth, horses, linen and musical instruments, and important foods like the cereal grass *sorghum*. They also spread technical knowledge of processes such as sugar refining and **distillation**.

From Persia, Europeans gained Islamic insight into mathematics, astronomy and science. From China, they adopted the technical, medical and scientific advances pioneered by the Song dynasty, including:

- printing
- new methods of paper-making
- the magnetic compass
- gunpowder
- porcelain.

DID YOU KNOW?

It was not until 1707 that the Europeans were able to imitate the Chinese process of producing porcelain.

SOURCE 2 A traditional Mongolian artwork showing polo, a game played by the Mongols to develop their riding skills. This sport is still played today.

The Mongols created the first paper money accepted by any government as payment for tax, and the value of Yuan dynasty paper money was guaranteed through exchange for gold or silver. The long-distance trade of the Pax Mongolica introduced new ways for people to do business:

- Merchants could use bills of exchange rather than having to carry metal coins.
- A banking system allowed deposit and withdrawal of money.
- Insurance could be contracted for valuable cargo.
- There was a 'lost and found' system for stolen goods and livestock.

The cities of the Pax Mongolica trading empire grew rapidly in size, prospering from the influx of European money. Within the multicultural Mongol Empire, freedom of religion was guaranteed, as was the safety of envoys or **ambassadors** from foreign lands. The Yassa provided the principles of law and order that governed Mongol territory. With each Mongol victory, civilisations were joined, new trade routes established and new technological and economic advances made. In bringing together these diverse people and cultures, the Mongol Empire began to shape the modern world.

However, not everybody was guaranteed safety within the realm of the khans. The suffering of the Chinese people under Mongol rule can be judged by the number of people who did not survive. The total population of China is estimated to have been approximately 120 million when the Mongol invasion began in 1225; by the end of the Yuan dynasty, it had fallen to 85 million.

SOURCE 3 Marco Polo recounts his experiences in the court of Kublai Khan, where he witnessed the use of paper money as a major innovation of the Yuan dynasty.

In this city of Kanbalu is the mint of the grand khan, who may truly be said to possess the secret of the alchemists, as he has the art of producing money by the following process. He causes the bark to be stripped from those mulberry-trees the leaves of which are used for feeding silk-worms, and takes from it that thin inner rind which lies between the coarser bark and the wood of the tree. This being steeped [soaked], and afterwards pounded in a mortar, until reduced to a pulp, is made into paper ... but quite black. When ready for use, he has it cut into pieces of money of different sizes, nearly square, but somewhat longer than they are wide ...

The coinage of this paper money is authenticated with as much form and ceremony as if it were actually of pure gold or silver; for to each note a number of officers, specially appointed, not only subscribe their names, but affix their signets also; and when this has been regularly done by the whole of them, the principal officer deputed [appointed] by his majesty, having dipped into vermillion [red] the royal seal ... stamps with it the piece of paper, so that the form of the seal tinged with the vermillion remains impressed upon it, by which it receives full authenticity as current money, and the act of counterfeiting it is punished as a capital offence.

SkillBuilder discussion

Using historical sources

1. Read **SOURCE 3**. What process is Marco Polo describing?
2. Work with a partner and make a list of questions about this process to learn more.

10.9 SkillBuilder activity COMMUNICATING

As a class, **discuss** how a flourishing dynasty like the Song was able to be overcome by a supposedly barbaric tribal people like the Mongols.

Questions to consider:

- **Explain** why the Mongols were considered barbaric.
- **Suggest** in what ways the Song and the Mongols were different from one another.
- **Identify** how the Song were different from previous dynasties.
- **Explain** what were the advantages and disadvantages of the Song and/or the Mongol armies.
- **Suggest** whether the Mongol victory was inevitable.

10.9 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
3, 5, 6	1, 2, 4, 7, 8,	9, 10, 11, 12

REMEMBER AND UNDERSTAND

1. **Explain** the term *Pax Mongolica*.
2. **Identify** what China learnt from European travellers.
3. **Identify** what the European world learnt from China because of trade. **Select** all that apply.
   - A. Printing
   - B. New methods of paper-making
   - C. Painting
   - D. Magnetic compass
   - E. Gunpowder
   - F. Porcelain

4. **Describe** the benefits of the creation of paper money.
5. **Identify** two benefits of the multiculturalism of Mongol China.
   A. Everyone obeyed the laws.
   B. There was freedom of religion.
   C. New cultural traditions were created.
   D. Safety of traders or ambassadors from other countries increased.
6. Evidenced by a fall in population, the **Mongols** / **Chinese** / **Japanese** / **Europeans** suffered under Mongol rule.

ANALYSE AND APPLY

7. **Explain** what **SOURCE 1** reveals about the trade routes under Mongol rule.
8. **Identify** the Mongol sport, depicted in **SOURCE 2**, which is still played today.
9. Read **SOURCE 3**.
   a. **Identify** what the 'secret of the alchemists' is. You may need to refer to other sources to find this out.
   b. Marco Polo seems to see money-making as an almost mythical process. **Identify** the words and phrases that contribute most to this sense. **Quote** them.

EVALUATE AND COMMUNICATE

10. **Describe** who gained the most from the Mongol expansion, and who lost the most.
11. **Explain** whether the term *Pax Mongolica* was an appropriate description for the Mongol Empire. **Discuss** why or why not.
12. **Suggest** whether the legacy of the Yuan dynasty was positive or negative. **Explain**.

Answers and sample responses for this topic are available online.

LESSON 10.10 How did the empire end?

LEARNING INTENTION

By the end of this lesson you should be able to describe the many factors that led to the collapse of the Yuan Empire.

Tune in

To many cultures, the Mongols always remained 'barbarians'. Countries that managed to avoid conquest, such as Japan, depicted them as ruthless and uncultured. **SOURCE 1** was a form of **propaganda**, as the Japanese managed to avoid invasion by the Mongols.

Study **SOURCE 1** and consider the following:

- How can you identify which figures are Japanese and which are Mongolian?
- What weapons are being used by each side?
- Describe the ships which the Mongolians have arrived on.

SOURCE 1 A depiction by Japanese artists of samurai fighting against the Mongol invasion of their homeland

10.10.1 A failing leadership

The Mongol Empire, once the largest land empire in history, started to fall apart due to corruption and internal fighting. After Kublai Khan died in 1294, his grandson Temur became emperor and tried to create a fair society by including Chinese leaders in the government and punishing corrupt officials.

However, after Temur's death in 1307, the Yuan leadership became unstable, with seven emperors in just 25 years. These new rulers were seen as too Chinese by the Mongols; as a result, they passed strict laws against the Chinese, making them unpopular. The government became weak and corrupt over time.

Mongol women, previously known for their independence, lost influence by the fourteenth century. Although they did not adopt the Chinese practice of foot binding, their lives became more restricted, similar to Chinese traditions. In Persia, Mongol women also adopted the **chador**, a sign of religious devotion.

10.10.2 Rebellion

With their leadership weakening, the powerful Mongol clans began fighting with each other and disobeying the emperor. During the fourteenth century, there were numerous Mongolian rebellions against the Yuan and China was hit by a series of natural disasters. The Yellow River broke its banks, thousands drowned and China starved in the terrible famine that followed the flood. The Yuan government increased the suffering of the Chinese people when it forced armies of Chinese peasants to work on the rebuilding of the Yellow River's **dykes** and waterways. As conditions worsened, rebellion spread. In addition to this, it is believed that the bubonic plague started somewhere in China during the fourteenth century and had a significant negative impact on the population of Yuan China.

SOURCE 2 In the first century BCE, the historian Yuan Káng explained the Chinese belief in the **mandate** of heaven and the principles of good government. Yuan rulers were far from these ideals.

The king Tsu Chia [from the Shang dynasty] had been one of the ordinary people. When he came to the throne he knew what the people needed and so was kind and protective towards them. He didn't dare treat with contempt those who needed him. He remained on the throne for 33 years ...

The kings of the later Shang dynasty did not know anything of the hardships of the peasants and so did not know their people. They didn't know anything except the pursuit of pleasure; and so not one of them had a long life. They only ruled for three or four years.

SkillBuilder discussion

Continuity and change

Read **SOURCE 2**. What significant change is historian Yuan Káng referring to?

With this in mind, how did the kings of the later Shang dynasty contribute to the decline of the Yuan dynasty?

Zhu Yuanzhang

Chinese hatred of Mongol rule led to the growth of Chinese secret societies and rebellions against the Yuan dynasty. The most successful rebel leader was a peasant named Zhu Yuanzhang. After his family died in the famine, he became a bandit and rebel leader.

In 1356, Zhu Yuanzhang led an army of rebels to capture the strategically important city of Nanjing. Over the next decade, from his stronghold in Nanjing, Zhu Yuanzhang used his knowledge of military strategy and government policy to extend his control over all of southern China.

In 1368, he moved his army north and captured Beijing without a fight. Victorious, Zhu Yuanzhang declared himself the first emperor of the Ming dynasty, meaning 'brilliance'.

SOURCE 3 Zhu Yuanzhang rose from humble beginnings to lead the rebellion that destroyed the rule of the khans.

The last Yuan emperor, Toghun, fled Beijing and the Mongols retreated with him to the vast grasslands and open plains of their homeland. Only a century after the death of Genghis Khan, the mighty Mongol Empire had fallen.

10.10 SkillBuilder activity USING HISTORICAL SOURCES

Cultures outside of Mongol rule considered them to be 'barbarians'. **Write** an explanation supporting or refuting this claim using evidence from this topic.

Consider the following:

- Where the Mongols came from
- How Mongol culture and society was different from Chinese culture and society
- Nomadic life compared to an agricultural life centred around large-scale cities
- How the Mongols fought

10.10 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
4, 5, 6	1, 2, 3, 7, 9	8, 10, 11, 12

REMEMBER AND UNDERSTAND

1. **Explain** what happened to the Yuan leadership following Kublai Khan's grandson Temur's death.
2. **Discuss** how the Chinese viewed their Yuan leaders. **Explain** how this led to a weakening of their leadership.
3. **Explain** how the role of Mongol women changed over the generations.
4. **Explain** why the Mongol tribes started fighting among themselves.
   A. They were fighting over land.
   B. There was no emperor.
   C. There were peasant uprisings.
   D. Their leadership was weakening.
5. **Determine** whether the following statement is True or False.
   The flooding of the Yellow River caused famine that ultimately strengthened the rule of the Yuan government as the people were unable to rebel.
6. Zhu Yuanzhang was from a **royal** / **wealthy** / **peasant** / **upper-class** family.
7. **Explain** what happened to the Mongol rulers after Zhu Yuanzhang started the new dynasty.

ANALYSE AND APPLY

8. There are many Chinese artworks similar to **SOURCE 1** that depict Mongols in unflattering ways. **Describe** what you can see them doing here. **Explain** whether this is an accurate portrayal.
9. Read **SOURCE 2** carefully. **Explain** what the Chinese belief of the mandate of heaven and the principles of good government were.
10. Examine **SOURCE 3**. **Describe** the pattern on Zhu Yuanzhang's robe. **Suggest** what it might symbolise. (You may wish to refer to **SOURCE 2** in lesson 10.7.)

EVALUATE AND COMMUNICATE

11. Write a paragraph **explaining** how and why the Yuan dynasty fell. **Identify** where you have outlined the main reasons for the retreat of the Mongols back to their homeland.
12. **Examine** the background and life of Zhu Yuanzhang in the lead-up to becoming emperor. **Explain** what he did that support his rise from peasant to emperor.

Answers and sample responses for this topic are available online.

LESSON 10.11 Inquiry: How did the Mongolian armies conquer and control societies?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** how the Mongolian armies conquered and controlled foreign societies and how they influenced each other.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task, you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching

Mongolian armies swept across most of Asia and bordered eastern Europe. Some modern ethnic borders still reflect this boundary. **Research** what modern-day countries in eastern Europe came under the control of the Mongolians and whether there are any cultural ties to this time.

Step 2: Using historical sources

Use **SOURCES 1** and **2** to **consider** the different form of warfare Mongolian soldiers were using compared to what Europeans would have been familiar with, and likewise the tactics or weapons Europeans had which Mongolians would not have encountered before. What challenges may this have posed for both sides?

SOURCE 1 This illustration shows Mongolian and Hungarian warriors fighting for control of a bridge over the Saho River.

SOURCE 2 This illustration is from the *Chronicum Pictum*, made in the mid 1300s. On the left Mongols have several women captive while on the right a woman has just been rescued by the Hungarian soldiers.

Step 3: Historical perspectives and interpretations

Consider the Mongolian Empire's influence on other societies. Many Christian kingdoms were afraid of invasion — why do you think they were concerned? What steps might they have taken to reduce the chance of this happening?

Step 4: Communicating

Draft a letter from the king of a region bordering Mongolian territory. You must **convince** the Mongolians not to attack while not becoming their subject or using up all of your resources. Consider what you have learned or investigated in the rest of this inquiry task.

Complete your self-assessment using the **Inquiry rubric** or access the 10.11 exercise set to complete it online.

LESSON 10.12 Review

10.12.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

10.2 How do we know about the Mongol expansion?

- There are a number of primary and secondary sources from which historians draw their knowledge of the Mongols of the thirteenth and fourteenth centuries.
- There are official records such as the official history commissioned by the khan, as well as the writings of explorers who visited the Mongol Empire from Europe, such as Marco Polo.
- There is a lot of surviving artwork, from calligraphy to paintings, that depict both ordinary life and famous battles. Some of these were painted at the time and some in the centuries after.
- There are many artefacts such as jewellery, tools and other everyday objects.

10.3 What was China like before Mongol conquest?

- The ruling family before the Mongols were the Song, who ruled from 960 CE.
- Under the Song a strong civilian government was built up, leading to a period of peace during which the population grew significantly.
- As a result of the peace under the Song, the cities became busy and bustling places, with a lot of trade.
- Song cities were built in the shape of a square with strong defensive walls. The houses were grouped together and there was organised rubbish and waste collection.
- There were many peasants living traditional agricultural lives, who were bound to the land through farming.
- The family was a strong unit, with loyalty to the family coming before loyalty to even the government.
- During the Song dynasty, inventions flourished, many of which eventually spread to the Western world, such as gunpowder and printing.
- The peace of the Song dynasty opened it to weakness, as their enemies grew stronger through war with other tribes.
- Eventually the Jurchen invaded and drove the Song dynasty out of northern China, establishing their dynasty in Beijing and leaving southern China to the Song, until eventually they were defeated by the Mongols.

10.4 Who were the Mongols?

- The Mongols were a nomadic tribal people from the cold and barren lands of Mongolia to the north and west of China.
- The Mongol region was too cold and dry for crops, so the tribes raised animals, such as herds of cattle, goats, yaks and sheep.
- The lives of the Mongol people were harsh, with few luxuries and shaped by the seasons.
- The Mongols used camels and oxen for carrying things. However, horses were their most treasured asset, used for transport, hunting and warfare.
- The Mongols were powerful and seasoned warriors.
- They lived in small clans who formed a tribe, ruled by a chieftain or khan.
- Many of the links within the tribe were formed by marriage connections.
- Women managed the daily camp life and were valued for this.

10.5 How did Temujin come to power?

- Temujin was born around 1162. He was the son of a warrior and minor chieftain.
- Temujin's father died when he was young and his mother Yulun raised Temujin, instructing him in the skills of a warrior.
- Temujin became tribal chief and in 1206 was elected khan, leader over his fellow tribal chieftains, taking the name Genghis Khan, meaning 'universal ruler'.

- To ensure stability, Genghis Khan used the three ties that held these nomadic warriors together: marriage, sworn brotherhood and friendship.
- Genghis Khan began a military campaign that saw him control a major section of the trading route, the Silk Road and gave his army direct access to China.

10.6 How did the Mongols conquer the world?

- The Mongol tribes made up a mighty army of tough and disciplined horsemen.
- Genghis Khan successfully invaded China in 1211.
- Mongol soldiers were equipped with a variety of weapons, such as lances, bows, swords and daggers, as well as a shield, helmet and armour made of leather and iron.
- Their horses were stout and hardy animals who could survive bitter winters and each soldier had five, which meant that they could travel long distances rapidly.
- Genghis Khan reorganised the army, increasing its strict discipline and creating tightly drilled units. This strict code of discipline was written onto a scroll called the Yassa.
- The Mongols moved across western Asia, defeating all who resisted, beginning with northern China and moving west.
- When Genghis Khan died in 1227 his empire was divided between four of his sons and grandsons.
- Kublai Khan advanced further into southern China, defeating the Song.
- In 1276, the final victory was complete. The Mongol Empire stretched from the Arctic Ocean to the Persian Gulf and from Hungary to Korea.

10.7 What was China like under Mongol rule?

- When he became emperor of China, Kublai Khan named his new dynasty Yuan, meaning 'creative force'.
- He established the capital in what is now Beijing and established a government that blended Mongol and Chinese traditions.
- He appointed a General Secretariat to enforce his laws and ensure efficient government.
- He worked hard at rebuilding China after the decades of war and conquest and he rebuilt trade connections out of China.
- He encouraged the printing of books and the spread of knowledge.
- Kublai Khan built himself a magnificent palace on the site of the ancient city of Chung-tu, and a summer palace in Mongolia in Xanadu.
- In 1260, two Italian brothers travelled from Venice and took the long and dangerous journey along the Silk Road to China.
- The brothers were welcomed at the court of Kublai Khan and eventually returned home as ambassadors for the Yuan dynasty.
- In 1271, the Polo brothers returned, this time with Nicolo's son Marco.
- Marco spent the next 17 or so years of his life as the khan's trusted advisor and ambassador, travelling around the Yuan Empire on the khan's business.
- When he eventually returned to Europe, he joined the Venetian navy. During a skirmish with the Genoese he was taken prisoner and it was here that he told the tale of his travels to the writer Rusticello of Pisa, who went on to write *The Travels of Marco Polo*.
- Many people questioned the truth of Marco's stories but he stuck by them, inspiring many others to follow in his footsteps in later years.

10.8 What was the Yuan court like?

- Kublai Khan's wife and mother both influenced him in accepting the Chinese belief system in order to rule over the 100 million people of Yuan China.
- His court became a place where scholars and religious leaders debated matters and ideas, and where art and culture flourished.
- The three main religions in the Song dynasty were Confucianism, Daoism and Buddhism; these were all tolerated in the Mongol court.

- Painting, poetry and calligraphy flourished as well. A group of painters known as the *literati* depicted nature as they experienced it and were very influential on future artists.
- The court was a vibrant place, welcoming of visitors and the khan encouraged free exchange of ideas, making it quite multicultural and tolerant for its time.

10.9 Was there peace under Mongol rule?

- Western scholars refer to the period of the Mongol dynasty as *Pax Mongolica* (Mongolian Peace), because the period of relative peace allowed the barrier between the East and the West to be crossed by trade and an exchange of ideas.
- Under the rule of the khan, different ideas were tolerated and many different belief systems were brought together.
- Ideas from China were passed to Europe, such as printing, new methods of paper-making, the magnetic compass, gunpowder and porcelain, as well as the concept of paper money.
- The Mongol Empire flourished in many ways, but there were still many Chinese people who suffered under the Mongol rule, with the Chinese population dropping from 120 million at the start of the Yuan dynasty to 85 million by the end of it.

10.10 How did the empire end?

- In the years following Kublai Khan's death, the Yuan leadership was constantly changing, and this weakened the empire.
- The Mongols thought the Yuan leaders too Chinese and the Chinese thought them too Mongol.
- The leaders became corrupt and weak. With the leadership weakening, the Mongol clans began fighting with each other again.
- China was also hit by a series of natural disasters that led to great suffering for the Chinese peasants. As the Chinese hatred of the Mongols grew, there was a growth in planned rebellions.
- A peasant rebel leader Zhu Yuanzhang began a takeover of strategically important cities, eventually capturing Beijing and declaring himself the first emperor of the Ming dynasty, meaning 'brilliance'.
- The mighty Mongol Empire had fallen only a century after the death of Genghis Khan.

10.11 Inquiry: How did the Mongolian armies conquer and control societies?

- As the Mongolians engaged with different cultures, they came across many new forms of warfare and weaponry.
- Many European nations were terrified of invasion by the Mongols who were seen as an unstoppable force.

10.12.2 Key terms

ambassador an authorised messenger or representative
barbarians To Come
blockade the shutting off of a location to prevent entry or exit
chador a dark dress or cloak that covers the body and face below the eyes
civil servant a person who works for the public
courier a messenger, often carrying important government documents
distillation the purification or concentration of a substance
dyke a barrier or bank of earth for controlling water of the sea or river
dynasty a sequence of rulers from the same family
imperial the rule of an emperor or something belonging to an empire
literacy the ability to read and write
magistrate a court official who hears cases in the lowest court in the legal system
mandate a command or order from a superior power
mercenary soldier who fights for money rather than for ideals or patriotism
mutton the flesh of a mature sheep used as food
occupation invasion, conquest and control of a nation or territory by foreign armed forces

porter a person who carries luggage and heavy loads
propaganda information, especially of a biased or misleading nature, used to promote a political cause or point of view
rickshaw a small two-wheeled vehicle pulled by a man
siege capturing a protected place by surrounding it and cutting off supplies
sinew the tissue that binds bones and muscle together
tribute a tax or regular payment given to ensure protection or peace
ward a district in a city or town

10.12.3 Reflection

Revisit the inquiry question posed in the Overview:

The Mongol Empire stretched from Europe to the Pacific Ocean. What allowed the Mongols to spread their influence? What was the way of life in Mongolia, and what impact did they have on the world?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

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Post-test	Online Post-test
eWorkbook	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary
Video eLesson	Mongol expansion

10.12 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 7, 8, 12	2, 5, 9, 11, 15	4, 6, 10, 13, 14

REMEMBER AND UNDERSTAND

1. It was said that the Mongols could live in the saddle for up to:
   A. three days.
   B. five days.
   C. seven days.
   D. ten days.
2. Temujin was raised by:
   A. his father.
   B. his mother.
   C. both his mother and father.
   D. a neighbouring clan after he was orphaned.

3. Identify the roles Mongol women were tasked with. Select all that apply.
   A. Herding and milking all the livestock
   B. Arranging marriages within clans
   C. Rearing the children
   D. Cooking and sewing animal skins into warm winter clothing
4. Kublai Khan divided China into four different groups. Identify which of these groups suffered the most under the Yuan dynasty. Select all that apply.
   A. Southern Chinese
   B. Northern Chinese
   C. Non-Chinese allies and mercenaries
   D. Mongols
5. Identify which of these was ***not*** an invention that originated during the Song dynasty.
   A. The wheelbarrow
   B. The clock
   C. The compass
   D. Paper money
6. The Mongol warrior code was known as:
   A. Yaza.
   B. Yassa.
   C. Yama.
   D. Yada.
7. Identify which of the following statements is not true about the Mongol homelands.
   A. The climate was harsh.
   B. It was too cold and dry to grow crops.
   C. The people lived in small cities.
   D. The best way to survive was by being nomadic.
8. Explain why the Chinese regarded the Mongols as 'barbarians'.
   A. The Mongols led poor and simple lives.
   B. The Mongols ate mutton, which the Chinese hated.
   C. The Mongols spoke a different language.
   D. The Mongol women had much more freedom.
9. Identify who was at the bottom of the social hierarchy in Yuan China.
   A. Mongols
   B. Northern Chinese
   C. Southern Chinese
   D. Non-Chinese allies
10. Identify the faiths that the Mongols accepted. Select all that apply.
    A. Shintō
    B. Daoism
    C. Buddhism
    D. Christianity

ANALYSE AND APPLY

11. **Describe** what life was like in China before the Mongol invasion.
12. **Explain** why Genghis Khan's army was so effective.
13. **Identify** what the cultural achievements of the Mongol Empire were.
14. **Summarise** the role of the Mongols in making connections between Europe and Asia.
15. **Outline** the reasons for the decline of the Mongol Empire.

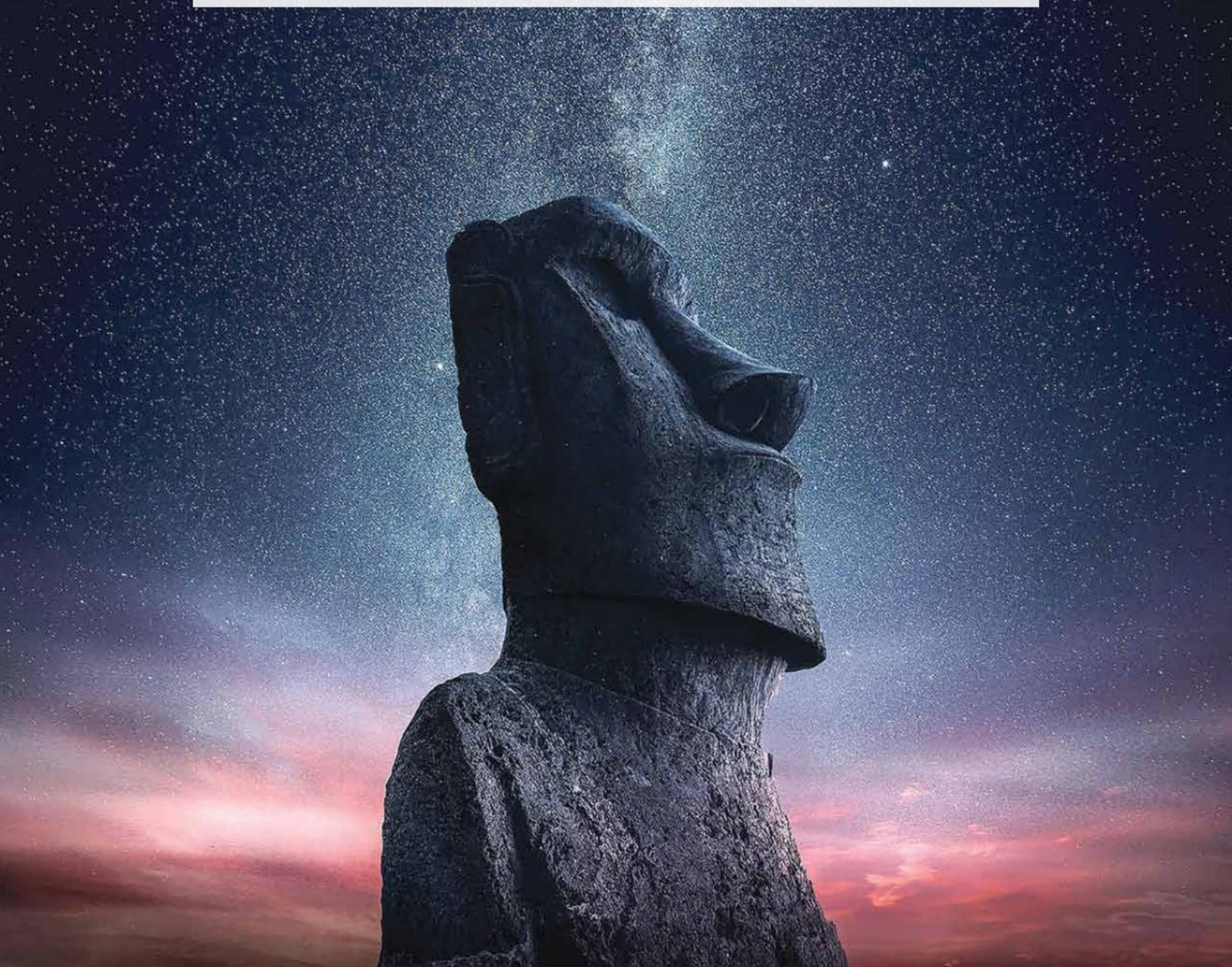
Answers and sample responses for this topic are available online.

11 Polynesian expansion across the Pacific

LESSON SEQUENCE

online only

11.1 Overview
11.2 How do we know about the Polynesian expansion across the Pacific?
11.3 Exploring the Polynesian Triangle
11.4 What happened on Rapa Nui?
11.5 What was life like in Hawai'i?
11.6 Who were the people of Aotearoa?
11.7 Were customs and culture the same everywhere?
11.8 What happened when Polynesians settled and stayed?
11.9 Inquiry: Religion in Polynesia
11.10 Review



LESSON 11.1 Overview

INQUIRY QUESTION

What is significant about the Polynesian people and their lives?

The history of the Polynesian people is remarkable and holds lessons for us today. Their voyages and achievements are truly awe-inspiring but can also teach us about how we interact with the natural world. Rising sea levels are threatening many islands in the Pacific, many of which were settled by Polynesians.

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Pre-test
Online pre-test

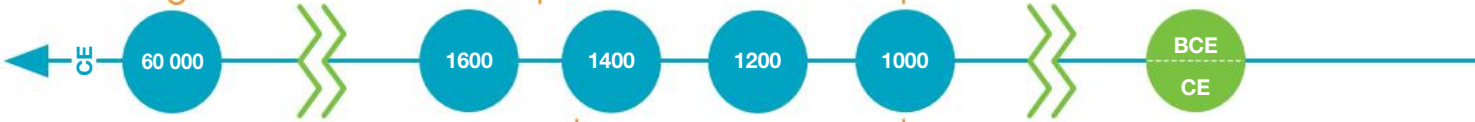
eWorkbook
Customisable worksheets for this topic (ewbk-14248)

Digital document
Key terms glossary (doc-43125)

Video eLesson
Polynesian expansion across the Pacific (c. 700–1756) (eles-6058)

c. 60 000 BCE
Aboriginal peoples have lived on the Australian continent for over 60,000 years

c. 1500–1000 BCE
The Lapita people spread across Polynesia.



c. 1000–1450 BCE
Mo'ai carved and erected on Rapa Nui.

SkillBuilder

Use the SkillBuilder activities to develop these Historical concepts and skills:

- HISTORICAL QUESTIONS
- CHRONOLOGY
- USING HISTORICAL SOURCES
- CONTINUITY AND CHANGE
- CAUSES AND CONSEQUENCES
- HISTORICAL SIGNIFICANCE
- COMMUNICATING

c. 300 CE
Polynesians settle the Marquesas and Hawai'ian islands.

c. 1000 CE
Polynesians arrive in New Zealand (the arrival of the Great Fleet).

c. 1722 CE
Dutch navigator Jacob Roggeveen arrives on Rapa Nui on Easter Sunday and names the island accordingly.

1769 CE
Captain James Cook arrives in New Zealand.

200 | 400 | 600 | 800 | 1000 | 1600 | 1800 | 2000 | CE

c. 700 CE
Polynesians settle Easter Island.

c. 1600 CE
The moa bird becomes extinct, forcing the Māori to alter their lifestyle.

1976 CE
The voyage of the Hokule'a recreates the 10 000 km sea voyage between Hawai'i and Tahiti.

LESSON 11.2 How do we know about the Polynesian expansion across the Pacific?

LEARNING INTENTION

By the end of this lesson you should be able to **explain,** using source material, what we know about Polynesian culture and expansion across the Pacific.

Tune in

Finding an artefact such as a waka (canoe) gives us great insight into the technology of ancient Polynesians. They used stone tools to shape out logs and carefully combined these together.

Imagine that you are an archaeologist from the future examining something from the room around you (i.e. a phone, a pen, a water bottle). What could examining the object help you better understand or deduce about the technology of today?

SOURCE 1 A *waka taua* (war canoe) in an exhibition at the Whanganui Regional Museum in New Zealand

11.2.1 How do we know about Polynesian expansion?

The indigenous people of the Pacific travelled incredible distances to settle new lands. This ocean covers nearly one-third of the world's surface. Between 1500 BCE and 1000 CE, they settled most of the habitable land in this vast ocean. They developed unique languages, societies and cultures.

There are many sources that tell us about the people of the Pacific, such as myths, legends, carvings, jewellery, tools and pottery. Their language, beliefs and tattoos also remain as evidence of their identity and culture.

Before written records

Early Polynesian history has no written records, so archaeological research is vital. Through surviving evidence, historians develop theories about what happened. As new evidence is found, theories are updated.

Pottery left behind by early Polynesians provides important information about their expansion. The Lapita people (who originated in East Asia and Taiwan) arrived in the Pacific over 3000 years ago. Their distinctive pottery shows their movements through the Solomon Islands and into the wider Pacific. They settled many islands over the centuries, including the Marquesas Islands, Tuamotus Islands, Society Islands, Easter Island and Hawai'i. Their travels covered immense distances, such as the distance between Tahiti and Hawai'i, which is greater than that between North America and Europe.

SkillBuilder discussion

Using historical sources

1. Work with a partner and decide what the distinctive decoration on Lapita pottery tells us about the migration patterns of the Polynesian ancestors?
2. How can the study of pottery help historians understand the expansion of the Polynesian people across the Pacific?
3. Why is it important for archaeologists to use physical evidence, like pottery, to develop theories about early Polynesian history?

SOURCE 2 The distinctive decoration on pottery left behind by the Lapita people, ancestors of the Polynesians, helps archaeologists and historians trace migration paths across the Pacific.

Did you know?

Many of the Polynesian words used in this chapter are translated into English and we've tried to use our alphabet, which sometimes doesn't work! When you come across a new word, do some research to find out how it's traditionally pronounced. For instance, many Māori words with *wh* in them use an *f* sound.

11.2.2 Colonial invaders

Written records, which appeared only in recent centuries, give historians a different view of Polynesian history. There are many records, but most were created by European colonisers, giving a biased perspective. Professor John Waiko from Papua New Guinea explains this in **SOURCE 3**. Historians must be careful with this type of evidence, as it can lead to a misunderstanding of the past.

SOURCE 3 Professor John Waiko's quote from his book *A history of Papua New Guinea and its neighbours* illustrates the problem of seeing history from a single perspective.

> They [the Europeans] have emphasised the activities of the foreigners. During the colonial encounter the emphasis was on the colonisers rather than the colonised. Their documents portray the roles of the colonisers rather than the roles of the indigenous people.

Changing history

In recent years, there has been a renewed focus on Polynesian history from the perspective of Polynesian people. This work is done by the descendants of the first settlers. Oral histories are important, but they need to be recorded quickly before they are lost.

Oral history can sometimes show what the teller wants to remember, rather than what really happened. Historians need to balance these stories with written records to get a fuller picture of the past.

In this topic, both traditional and modern names of places will be used. Knowing how European influence has shaped our views helps us remove bias. When talking about modern times, we'll use modern names.

Modern name	Traditional name
Easter Island	Rapa Nui
Hawaii	Hawai'i
New Zealand	Aotearoa
Society Islands	Tōtaiete mā
Tahiti	Hawaiki (in legend) Otaheite
The Marquesas Islands	Te Henua 'Enana (north) Te Fenua 'Enata (south)
Tuamotus Islands	Paumotus
The Cook Islands	Kūki'Āirani

11.2 SkillBuilder activity USING HISTORICAL SOURCES

In Year 7 you learned the importance of using sources as evidence. This task builds on those skills and teaches you to draw conclusions from the evidence at hand.

1. Copy and complete the table below using the sources in this lesson and others sourced from the internet. You might want to work in pairs to **investigate** and note down 3–5 sources.
   Use bullet points in the first instance to gather important information.

Source	Describe and outline its purpose	Outline what this source reveals about the past	Limitations of the source for historians
Lapita pottery			

2. **Explain** what conclusions we can draw from the evidence available about the nature of Polynesian expansion. Using the points you noted down, **construct** a paragraph response.

11.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5, 6, 7	8, 9

REMEMBER AND UNDERSTAND

1. **Identify** one of the last areas in which the Polynesian people settled.
   A. Hawai'i
   B. Rapa Nui
   C. Aotearoa
   D. Hawaiki
2. **Determine** whether this statement is True or False. Most of the information historians have gained about the early history of the Polynesian people is from written records.
3. The ancient Polynesian people settled Aotearoa in about _____ CE.
4. **Identify** who recorded much of the written evidence of the Polynesian people.
5. In recent years, there has been a renewed focus on the history of the Polynesian people. **Explain** how this history has been obtained.

ANALYSE AND APPLY

6. **Explain** why the recording of oral histories is such urgent work.
7. **Identify** one value and one problem with using oral history as evidence.
8. **Explain** how the remains of Lapita pottery (shown in **SOURCE 2**) help archaeologists trace Polynesian migration across the Pacific.

EVALUATE AND COMMUNICATE

9. **Discuss** how the written evidence discussed in **SOURCE 3** is a limited view of history.

Answers and sample responses for this topic are available online.

LESSON 11.3 Exploring the Polynesian Triangle

LEARNING INTENTION

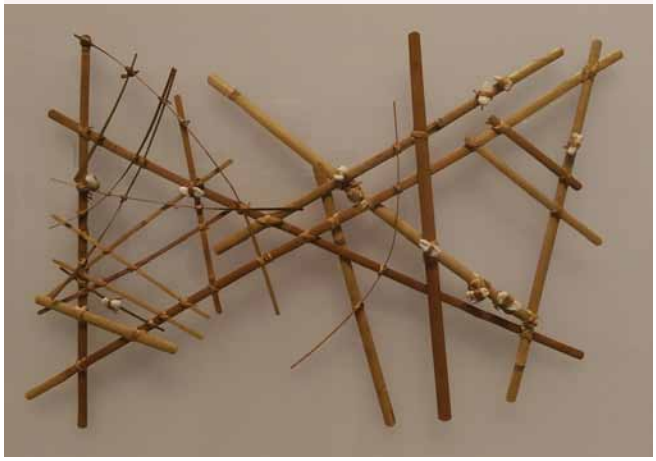
By the end of this lesson you should be able to **explain** the navigational techniques of the Polynesians and consider the enormous achievement of the people who explored the Pacific.

Tune in

SOURCE 1 is an example of a chart made from sticks and shells. Maps like these helped the early seafarers navigate the vast distances between the islands of Polynesia. The chart shows wave patterns and ocean currents (sticks) and islands (shells). It was a valuable tool in the absence of compasses and modern navigational instruments. These charts were called *rebbelibs*, *medos* or *mattangs*.

1. **How do Polynesian navigational tools, like stick and shell charts, differ from maps, and how are they similar?**
2. **How does environmental knowledge of wave patterns and ocean currents by Polynesian explorers influence navigation today?**
3. **How have human migration and settlement strategies evolved from ancient Polynesian times to now?**

SOURCE 1 Maps such as this showed more than just locations — they held information about wave patterns, currents and much more.



11.3.1 Traversing the Pacific

Polynesia is a region in the Pacific Ocean bordered by Hawai'i, Rapa Nui, and Aotearoa. It covers over 2 000 000 square kilometres and is mostly water. Archaeological evidence shows that the discovery and settlement of these islands were planned. The Pacific explorers were well-prepared, carrying plants like **taro** and **yam**, and animals like rats and dogs. They created new technology for long ocean journeys and a navigation system. The word 'Polynesia' comes from two Ancient Greek words: πολύς (polýs, 'many') and νῆσος (nêsos, 'island'). French scholar Charles de Brosses invented the term in 1756.

11.3.2 Navigation techniques

The Pacific Ocean is vast, covering half the circumference of the Earth. Polynesian explorers were excellent seafarers. They used charts made from sticks and shells to show islands and sea currents, passing this knowledge from generation to generation. They also used stars and natural signs, such as birds and clouds, to guide them.

11.3.3 A great undertaking

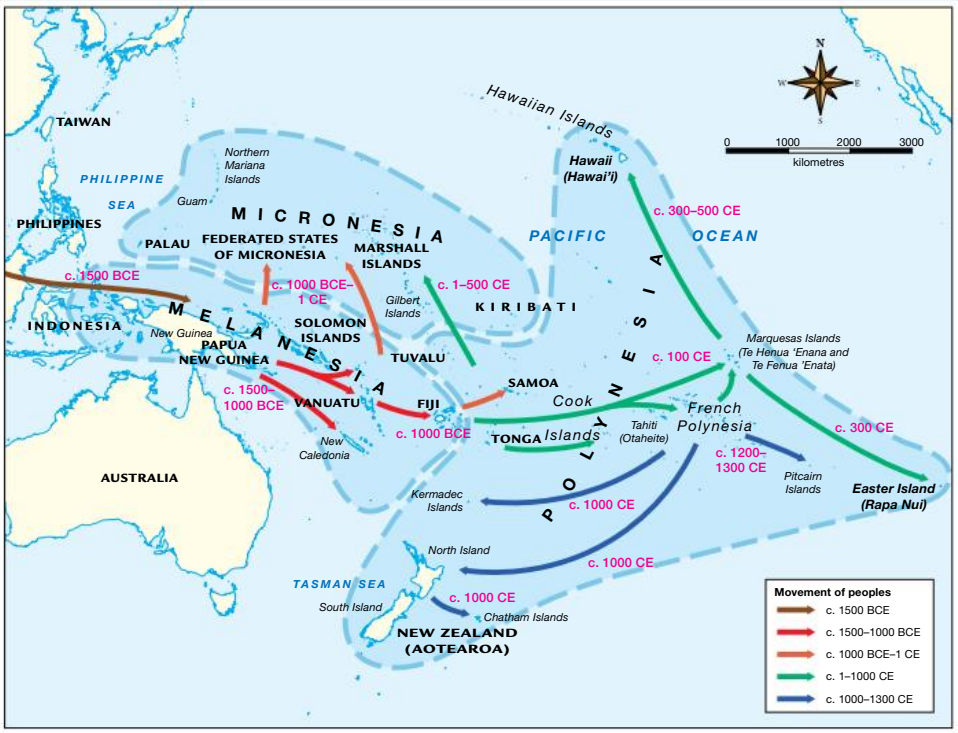
Settling the remote islands of the Pacific is one of the greatest exploration stories. These islands were the hardest places to reach. The Pacific Ocean is larger than the Atlantic and Indian oceans combined and covers one-third of the Earth's surface. It is so large it could fit all the land on Earth and still have space for another continent the size of Asia.

SkillBuilder discussion

Communicating

1. Working in groups or pairs, explain the migration and settlement patterns in the Pacific islands.
2. Suggest ways in which the physical geography of the Pacific Ocean might have influenced the navigation techniques and seafaring culture of the Polynesian explorers.

SOURCE 2 A map of the Pacific Ocean showing migration and settlement in the Pacific islands. The people of the Pacific islands belong to three main cultural groups — Melanesia (meaning black islands), Micronesia (small islands) and Polynesia (many islands).



Source: Map drawn by Spatial Vision.

Exploration of the Pacific first occurred on simple boats, or dugout canoes, that brought people across the ocean passages between South-East Asia and New Guinea, Vanuatu and the small surrounding island groups. The Pacific explorers travelled in sail-powered canoes designed with unique features such as a double hull for maximum storage over very long distances (see **SOURCE 3**). These explorers developed an extensive knowledge of stars, weather patterns and ocean currents. They closely observed the animals and birds of the Pacific, following their paths of migration and watching for the tiny clues that pointed them towards land.

SkillBuilder discussion

Historical significance

1. Why were the double-hulled canoes significant for the Polynesian explorers in their voyages across the Pacific Ocean?
2. How did Polynesian navigators use their knowledge of stars, weather patterns and ocean currents to explore and settle new islands?
3. Explain the historical importance of The Great Fleet and how it relates to the ancestry of the Māori iwi (tribes).

SOURCE 3 Double-hulled canoes like this one carried the Polynesian people across the Pacific Ocean. This artwork was created in the twentieth century.

The Great Fleet and the Māori ancestors

According to Māori legend, the voyages of seven waka (canoes), brought Polynesian people from the land of Hawaiki, now Tahiti, in search of a new home. These seven waka were called The Great Fleet, and are believed to have transported the ancestors of the Māori iwi (tribes):

- Tokomaru
- Tainui
- Te Arawa
- Aotea
- Takitimu
- Mataatua
- Kurahaupo.

SOURCE 4 'Ngawaka E. Whitu' (The Seven Waka). This early twentieth-century song (translated into English) portrays the Māori legend of the arrival of the seven waka.

Seven waka landed here

Paddle, paddle on

Tainui, Te Arawa, Mataatua

Paddle, paddle on

Tokomaru, Takitimu, Kurahaupo, Aotea ra,

These waka were paddled here

By our ancestors

The history of every Māori family, the whakapapa, maintains the connection with its ancestors' waka.

As they navigated across the vast distances, they discovered more than 20 000 islands. Most are tiny coral reefs, or the tips of high volcanic peaks jutting out of the ocean depths. These remote islands are separated by hundreds of kilometres of open sea. The navigation of these vast ocean distances remains one of the greatest achievements in human history.

11.3 SkillBuilder Activity COMMUNICATING

Imagine you and your family decide to travel a vast distance and settle in new land.

1. **Identify** possible reasons that could encourage or force you to leave your home.
2. **Deduce** what items you might need to take with you to set up a new life. You could group them under the following headings:
   - Items needed for the trip
   - Items needed for the new settlement

   If you want to, you could also **construct** subheadings under those headings, such as:
   - food requirements
   - tools
   - building supplies
   - agricultural supplies.
3. **Demonstrate** your findings to the class in a brief oral presentation. Reflect on and **determine** what are the key factors driving migration of this sort. Also **determine** what are the most important requirements for building a new settlement. You may want to include visual elements in your presentation.

11.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 6	7, 8, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** the correct words from the options below and complete the passage. Not all options will be used.

   Aotearoa Southern Ocean Hawai'i Rapa Nui Pacific Ocean

   Polynesia refers to the _____ region or triangle bordered by _____ in the north, _____ in the east and _____ in the south.
2. **Determine** whether the following sentence is True or False. Historians believe that the voyages by ancient Polynesians were accidental.
3. Polynesian **sailing** / **migration** / **exploration** is considered one of the 'greatest stories of world exploration in human history' due to the sheer **temperature** / **magnitude** / **depth** of the Pacific Ocean and the **pirates** / **weather** / **dangers** associated with open-sea voyaging.
4. **Recall** when from where migration and settlement of the Hawaiian Islands took place.
5. **Explain** how the ancient Polynesians knew that there were other lands in their region.

ANALYSE AND APPLY

6. **Name** the sorts of flora and fauna Polynesians brought with them on their voyages.
7. The scene in **SOURCE 3** illustrates the Raiatea islanders sailing their canoes from Raiatea in French Polynesia to Aotearoa (New Zealand). Use **SOURCE 2** to **construct** a map of a possible route for this journey.

EVALUATE AND COMMUNICATE

8. **Evaluate** what maritime knowledge assisted the Polynesian explorers.
9. Given that charts made from sticks and shells such as in **SOURCE 1** were handed down from generation to generation, **determine** what this suggests about the connection between Polynesian islands.
10. **Summarise** what **SOURCE 2** and the information in the lesson suggest about the navigation and seafaring skills of the early Polynesians.

Answers and sample responses for this topic are available online.

LESSON 11.4 What happened on Rapa Nui?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **explain** the achievements of the Rapanui people
- **compare** the impact on the island of Rapa Nui with modern climate change, and describe the impacts of overusing the land.

Tune in

The mo'ai demonstrate a form of ancestor worship, recognising great figures in the past.

1. **Consider whether you know any stories from your ancestors which you think are worth memorialising in the same way.**
2. **Brainstorm some different ways you could achieve this and compare your ideas to others in the class.**

SOURCE 1 The mo'ai are enormous carved statues.

11.4.1 In the middle of the ocean

Rapa Nui, also known as Easter Island and Te Pito o Te Henua, is a tiny island 11 000 kilometres east of Australia and 3600 kilometres west of Chile. It's one of the most remote islands in the world. According to legend, the Polynesian chief Hotu Matu'a led his people to the island over 1300 years ago and they named it Te Pito o Te Henua, meaning 'the end of land'.

The name Rapa Nui (Big Rapa) came later, from a visiting Tahitian who noticed the island's resemblance to another island, Rapa Iti (Small Rapa). Europeans named it Easter Island after Dutch navigator Jacob Roggeveen arrived on Easter Sunday, 1722.

11.4.2 The mo'ai

Rapa Nui's isolation led to the unique creation of stone statues called mo'ai between 1000 and 1600 CE. More than 900 statues exist today, made from volcanic rock, which is now degrading. Preserving the mo'ai is important.

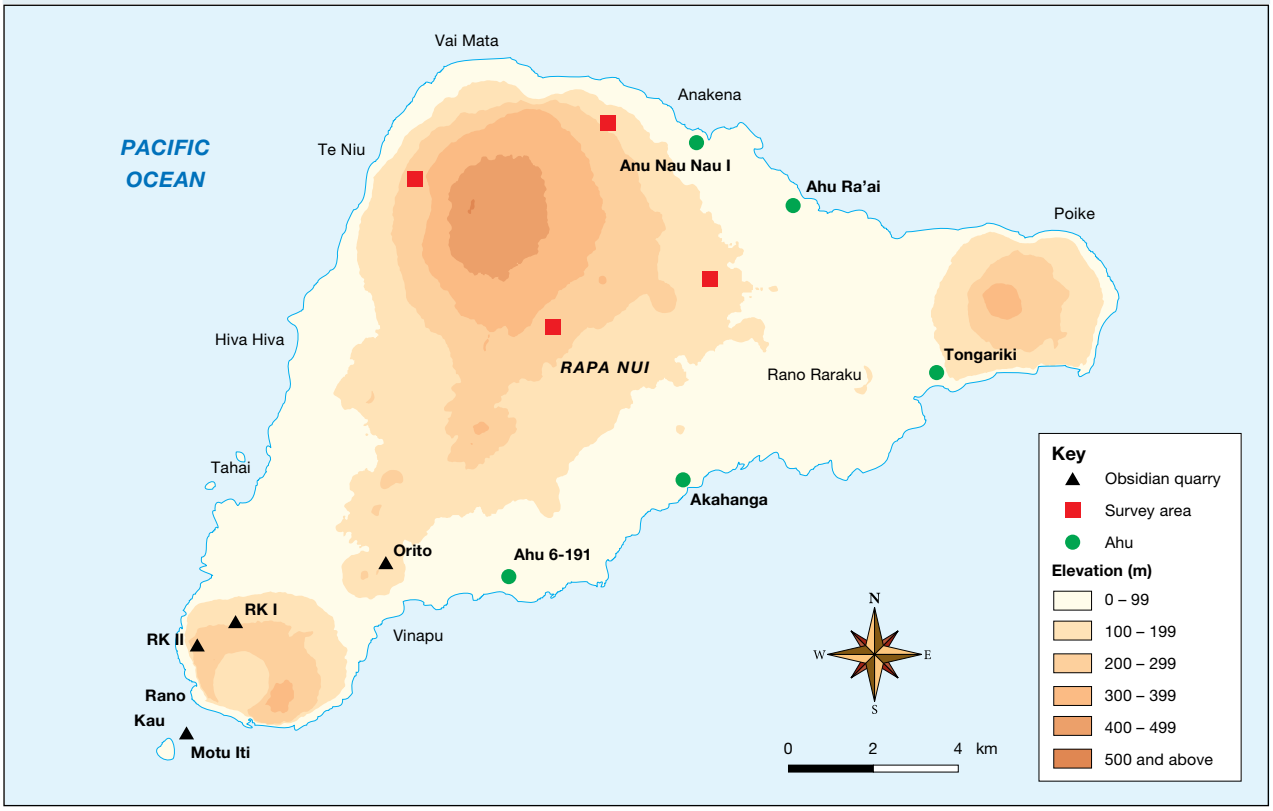
Ancestor worship

Most researchers believe the mo'ai were created for ancestor worship, and that they represent past chiefs. No two mo'ai are alike, suggesting they represent real historical figures.

Moving the mo'ai

The mo'ai were carved from volcanic rock at the Rano Raraku quarry and moved to ceremonial platforms called *ahu*. **SOURCE 2** shows the locations of five such platforms.

SOURCE 2 A map of Rapa Nui showing the location of quarries, pedestrian survey areas, and *ahu* (ceremonial platforms)



Source: Based on information from Stevenson, C. M., Ladefoged, T. N., Haoa, S., Chadwick, O., & Puleston, C. (2013). Prehistoric Obsidian Exchange on Rapa Nui. The Journal of Island and Coastal Archaeology, 8(1), 108–121. Map redrawn by Spatial Vision.

SkillBuilder discussion

Using historical sources

1. What does the map tell us about the location of quarries on Rapa Nui in comparison to the ceremonial platforms known as *ahu?*
2. The map shows five separate *ahu* sites. What geographical features do these sites have in common?
3. How might the *ahu* have influenced the social and political structure of the Rapanui civilisation?

Moving the mo'ai

Many mo'ai were moved from the quarries to the *ahu* over many kilometres, but some did not reach their planned spots and were left where they fell. This could be because they were simply too heavy to move. The largest mo'ai at Ahu Tongariki weighs 86 tonnes. According to legend, the mo'ai 'walked' to their places. Modern archaeologists show that by rocking statues from side to side and pulling them with ropes, they can be 'walked' across the land. Another method might have been to roll the mo'ai using logs. Both methods had a big impact on the environment. When Captain James Cook visited in 1774, he noticed that there were no trees taller than three metres.

SkillBuilder discussion

Historical Significance

1. Why do you think the statues of Ahu Tongariki are positioned with their backs to the sea? What significance might this have for the Rapanui people?
2. Looking at the background of **SOURCE 3**, what clues can you detect that moving the mo'ai had an impact on the environment?
3. Considering the engineering skills required to construct and place the mo'ai, what can we infer about the technological advancements and societal organisation of the Rapanui people?

SOURCE 3 Ahu Tongariki: the largest platform of mo'ai. Most statues stand with their back to the sea, protecting the islanders while turning their back on the spirit world.

11.4.3 Diminishing population

The collapse of the Rapanui civilisation is one which causes a great deal of debate between historians. The island is covered with examples of culture and heritage, and evidence suggests that the indigenous people — the Rapanui — had a far greater population in the centuries before Roggeveen arrived to find around 2000 inhabitants. Archaeologists suggest that at its height, there were as many as 15 000 people on the 163 square kilometres of land that is Rapa Nui. This society was relatively advanced and had a clear political structure. It was culturally sophisticated to the point that it had the only Polynesian writing system known to historians — rongorongo — as well as the engineering ability to construct and move the impressive mo'ai that met Roggeveen's ship in 1722.

The four major theories about what caused this downfall are described below.

SOURCE 4 An excavated mo'ai showing how much of the statue was buried underground

Stripping the land bare

This theory suggests that in order to mine, carve and move the mo'ai, the Rapanui had to strip the island of its trees. These enormous statues might have been rolled on the cut trunks of the subtropical palm trees of the island, a practice which continued until there were no trees left. The trees might also have been used for shelter, boat-building or other purposes.

Deforestation

One theory is that the Rapanui cut down all the trees to move the mo'ai statues, which were rolled on tree trunks. They also needed wood for shelter, boats, and other purposes.

Polynesian rats

Another idea is that the Rapanui brought rats with them. Without predators, the rats multiplied, eating tree seeds and causing deforestation.

European invaders

Some believe the Rapanui were thriving when Europeans arrived. The newcomers brought diseases and conflict, which severely impacted the native population.

Conflict among the people

There are stories and evidence, like the sharp **obsidian** *mata'a* tools, suggesting internal conflicts. However, recent studies suggest *mata'a* were more likely used for farming and carving rather than as weapons.

No matter the cause, the loss of trees meant no wood for boats, trapping the Rapanui people on the island. Today, Rapa Nui is a UNESCO World Heritage site, and its 5000 inhabitants work to protect their heritage.

Did you know?

The 'Easter Island heads' (mo'ai) actually have bodies as well. Some of these are on display on the *ahu* they rest on, but others are buried underground and must be excavated to be studied.

11.4 SkillBuilder activity USING HISTORICAL SOURCES

1. All across Rapa Nui there are fragments of small, sharp obsidian tools. These are called *mata'a* and have been given two suggested origins:
   - They are tips of spears and other weapons used to wage war against other people.
   - They are pieces of many different types of tools used for various purposes, such as agriculture or the carving of the *mo'ai*.

   Construct an argument for (supporting) each side, suggesting why it is the correct understanding of these tools.
2. It has been suggested that the Rapanui turned to cannibalism (eating other humans) prior to European arrival, which supports the idea that the *mata'a* were weapons.
   Alternatively, a study of 423 mata'a found that 'when you look at the shape of these things, they just don't look like weapons at all'.
   Propose your own conclusions about the mata'a and **justify** them with the evidence presented here or your own research.

11.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 5	4, 6, 8	7, 9

REMEMBER AND UNDERSTAND

1. **Determine** whether the following sentence is True or False. When he arrived at Rapa Nui, Captain Cook did not notice any trees above three metres tall.
2. **Identify** three main achievements of Polynesian culture that occurred on the island of Rapa Nui.
   A. The ability to govern a large, diverse population for an extended period
   B. The ability to cure the sick
   C. The ability to communicate via a writing system
   D. The ability to produce large murals
   E. The ability to construct and move the mo'ai
3. Fill in the spaces to complete the sentence. The main reasons provided to explain the existence of the mo'ai are that they are a form of _____ worship and statues of living people _____ to the islanders.
4. **Discuss** why most historians have concluded that the mo'ai were symbols of ancestor worship.
5. **Recall** why Rapa Nui was given the European name Easter Island.

ANALYSE AND APPLY

6. Using the sources and the information provided, **identify** how the mo'ai could be transported to the coastline from the quarry.
7. **Explain**, using **SOURCE 4** as your evidence, the impact of over-logging on the island of Rapa Nui.

EVALUATE AND COMMUNICATE

8. Rapa Nui represents a striking lesson about environmental management. Using their experience as evidence, **construct** a letter that you could send to your member of parliament warning of the dangers of poor resource management.
9. The island of Rapa Nui once had 15 000 inhabitants, but European records suggest that there were only 2000 by the time explorers arrived. **Propose** what you think is the most convincing theory for this decline.

Answers and sample responses for this topic are available online.

LESSON 11.5 What was life like in Hawai'i?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **explain** the Hawaiians' connection to and understanding of the land and sea
- describe the relationships between the islands and reflect on roles and positions in Hawaiian society.

Tune in

The *Hōkūleʻa* is a replica vessel based on ancient *waʻa kaulua*, **double-hulled canoes** designed to sail the open seas.

Write a list of questions you would research to learn more about this vessel, including how it was made, how long the journey took and how many people were on board.

Calculate the distance from Honolulu to Papaʻete and discuss whether you would be prepared to sail that far in a vessel of this sort.

SOURCE 1 The *Hōkūleʻa* arriving in Honolulu, Hawai'i after sailing from Papeʻete, Tahiti, in 1976

11.5.1 Settlement

Hawai'i is a volcanic **archipelago** at the north of the Polynesian Triangle. There are many theories as to how Polynesian peoples found and settled this remote and unique space. One is that the first waka arrived around 900–1200 CE from the Marquesas; later, around 1300 CE, people from Otaheite (Tahiti) travelled along the same route and conquered the original inhabitants. These dates have been debated for several years and will likely be revised as new evidence is found.

11.5.2 The *Hōkūleʻa*

In 1976, modern Polynesian sailors re-created a thousand-year-old voyage between Hawai'i and Tahiti on a double-hulled canoe called the *Hōkūle'a*. They sailed 10 000 kilometres using ancient navigation methods taught by a Micronesian navigator, proving that early Polynesians intentionally travelled vast distances across the Pacific. The *Hōkūle'a*, meaning 'star of gladness', showed the impressive seafaring skills of ancient Polynesians.

11.5.3 The Kānaka Maoli

By the time that European explorer Captain James Cook arrived in 1778, all of the islands of Hawai'i were established as a kingdom, with an *ali'i nui* (supreme ruler), *ali'i* (nobles) and kahuna (high priest) just below the supreme ruler, and the *maka'āinana* (commoners) performing the common tasks of the land. These people were set in their social position through a rigid **caste** system and referred to themselves as the Kānaka Maoli, or 'people of the land'. This hierarchy meant that some people had very few rights

or power over their lifestyle. In particular, the *kauwā* (slaves) had no say in how they lived their lives. It's unclear how this particular caste came about, but one theory is that they were war captives. Since status was passed down from parents to children, some *kauwā* were born into slavery.

Did you know?

It's possible that Captain Cook wasn't the first European to find the islands after the Polynesians. Maps and accounts from the 1500s suggest that Juan Gaetano, a Spanish explorer, arrived there long before Cook was born. On top of that, the island's inhabitants had some metal tools, even though they didn't know how to mine or shape the material themselves — perhaps they traded these with people who came before the English.

11.5.4 Farming and trade

It's unsurprising that the sea played a huge role in the lives of the people of Hawai'i. While there are hundreds of tiny islands in the volcanic archipelago, much of it was unsuitable for farming and there wasn't enough to support the needs of the people living there. The knowledge that Hawaiians had of the ocean was astounding, and the tools they used were very advanced for the time. One-piece fishhooks, **trolling lures** and fish farms were all used by these Polynesians, as they experimented and their skills grew beyond many of their neighbours'.

SOURCE 2 Today, modern Hawaiians are reviving fish ponds to bolster the population's food source in an environmentally friendly way.

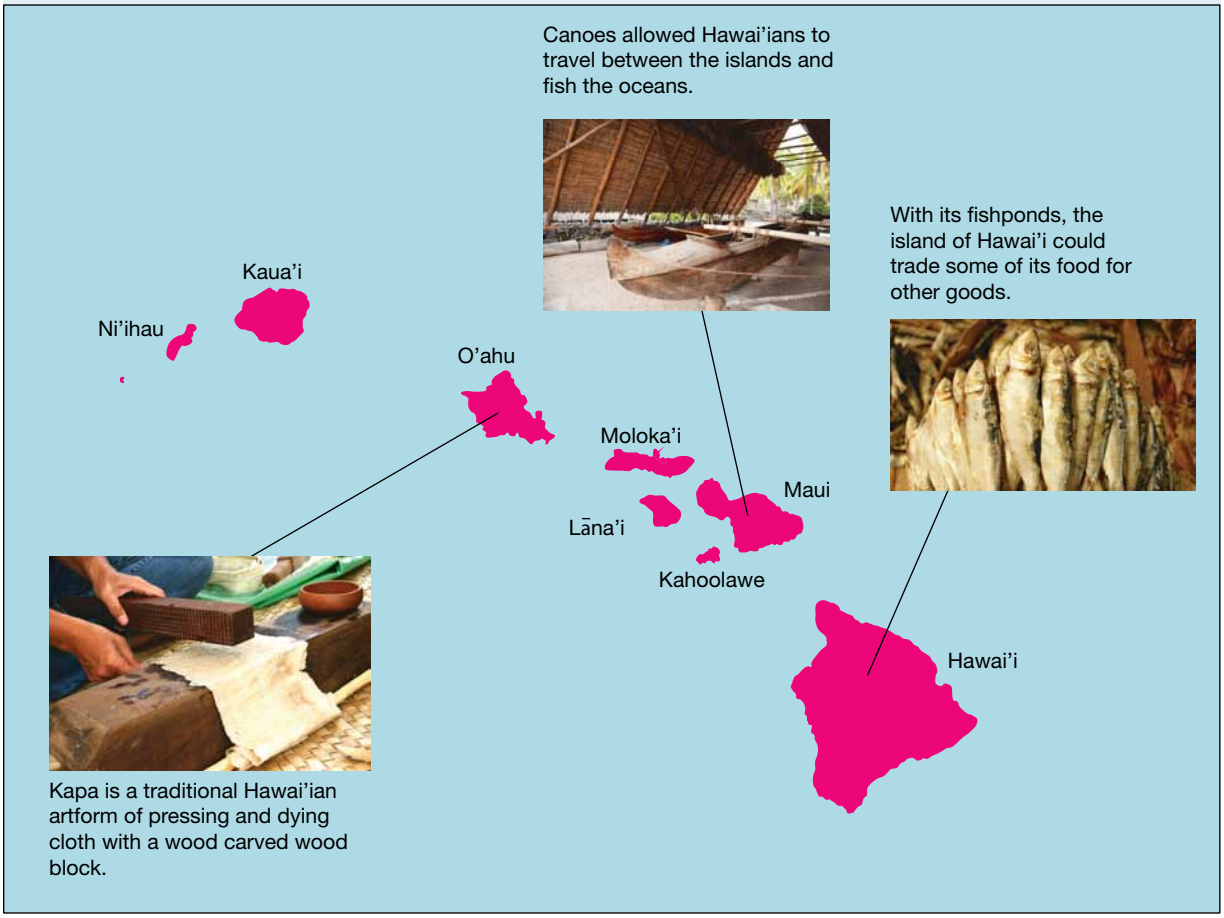
Hawaiians were among the first in the Pacific to specifically farm fish from a carefully constructed area designed to make harvesting easier. This guaranteed them food, rather than relying on the wind and weather to be good enough for sailing. They understood how to bait fish in by creating an environment full of food to attract them; they would then put slotted gates at the openings, trapping them inside. This meant that the fish populations would continue to grow and that they could remove any predators from the area.

Fish wasn't the only part of the Hawaiian diet, though. The *ali'i* were the managers of the land itself; they set the *maka'āinana* to work the land and farm food and materials for the whole island to use. It was believed that no one 'owned' the land, but rather that it belonged to the gods, and that the *ali'i* were just custodians.

Inter-island relations

Prior to the 1800s, there were many separate communities in Hawai'i. Each island had its own *ali'i nui* (supreme ruler) who controlled the land and the people on it. There was a great deal of conflict between these tribes, but more often there was trade and collaboration. Families became experts in their crafts and produced high-quality goods to share with each other. Quickly, islands became specialised in certain goods that they wanted to trade.

SOURCE 3 A map of the Hawaiian Islands showing what each community traded with others



SkillBuilder discussion

Continuity and change

1. Look at the map of the Hawaiian Islands showing what each community traded with others. Discuss why the particular items above were traded.
2. Do you know what the Hawaiian Islands trade today? Make some suggestions and check if you were correct.

The people of the Hawaiian Islands also interacted in different ways. They loved athletic competitions and champions would often be sent to represent their island — they would try to prove themselves the best in surfing, swimming, wrestling, boxing and running. One sport involved throwing spears at other contestants, so there was a lot at stake for the champions.

11.5 SkillBuilder activity HISTORICAL QUESTIONS

Juan Gaetano may have come to Hawai'i much earlier than the English. However, despite evidence supporting his visit, many historians are hesitant to recognise him as the first European to visit.

1. **Investigate**, conducting some basic research, Juan Gaetano and the theory of his visit to Hawai'i.
2. **Explain** why you think historians don't believe Gaetano visited first.
3. **Propose** your own arguments to support Gaetano's visit.
4. Until recently, much of United States and English history has been diligently collected and curated by people of English descent. To what extent do you think this influences the opinion that Cook (an Englishman) was the first outside person to come in contact with Hawai'i?
5. **Compare** this narrative with what you understand of Australia's history. What similarities, and what differences, do you notice?

11.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 5	2, 4, 6, 8	7, 9, 10, 11, 12

REMEMBER AND UNDERSTAND

1. Invaders followed the first Hawaiian settlers from which other Polynesian region?
   A. Otaheite
   B. Aotearoa
   C. Rapa Nui
   D. Spain
2. **Recall** the Hawaiian term for the 'supreme ruler' who controlled an island.
3. The voyage shown in **SOURCE 1** shows the ship named ***Wa'a kaulua*** / ***Hōkūle'a*** / ***maka'āinana*** arriving in **Honolulu** / **Kahului** / **Hilo**. This trip took **21** / **32** / **45** days and was done **with** / **without** modern equipment.
4. **Explain** why modern Hawaiians might start using fish ponds again.
   a. Put the following events in order (with earliest at the top) by numbering them 1–4 on the left.
   b. Assign a date to each event based on the content in this lesson.
      _____ Captain James Cook arrived in the _____ th century.
      _____ First waka arrived in Hawai'i in the _____ rd century.
      _____ Invaders from Otaheite arrived in the _____ th century.
      _____ Juan Gaetano may have visited the islands in the _____ th century.
6. **Explain** why the *Hōkūle'a* needed a navigator who was not of Hawaiian heritage.

ANALYSE AND APPLY

6. **State** what Kānaka Maoli means. **Explain** why they might have given themselves this name.
7. **Discuss** why islands would have sent champions to represent them in athletic competitions. **Explain** what was gained from this practice.

EVALUATE AND COMMUNICATE

8. Fish traps meant that Hawai'i had enough food to support its people. **Explain** whether you believe this practice was sustainable. **Justify** your response.
9. **Determine** how an event such as the voyage of the *Hōkūle'a* in 1976 provides important evidence for historians studying Polynesian expansion.
10. The *kauwā* (slaves) had no rights and could not move outside of their station. **Propose** why you think the people of Hawai'i wanted to have a caste like this.

Answers and sample responses for this topic are available online.

LESSON 11.6 Who were the people of Aotearoa?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** the main features of a Maori community explain how Aotearoa was founded and why this settlement was different to other Polynesian settlements.

Tune in

As **SOURCE 1** shows, New Zealand is much further south than other Polynesian settlements.

SOURCE 1 Polynesian explorers had to travel a vast distance to reach Aotearoa.

1. **What challenges do you think being this far south would pose to the people settling this area?**
2. **Consider what you know about how Polynesians lived and what might have to change if they wanted to stay in this new land.**

11.6.1 The land of the long white cloud

Historians are not certain when and why the human settlement of New Zealand began. Archaeological evidence suggests that sometime between 800 and 1130 CE, a small group of Polynesian people, perhaps even a single family, sailed from the Kūki ’Āirani (the Cook Islands) to the coast of what would become Aotearoa.

Why?

There is not enough evidence to give a definite answer to the question of why the first settlers came to New Zealand. Some theories are:

- They were escaping from war or disease.
- It was a search for land and resources because of island overpopulation.
- A spirit of adventure developed through sophisticated skills of navigation.
- A planned short voyage of exploration was blown off course.

Although none of these has been definitively proven, most historians agree that the voyage to New Zealand was intentional and carried out by careful planning and skillful exploration. In support of that theory, it is argued that a raft or canoe blown off course would not have had enough people or supplies to establish a long-term settlement.

When?

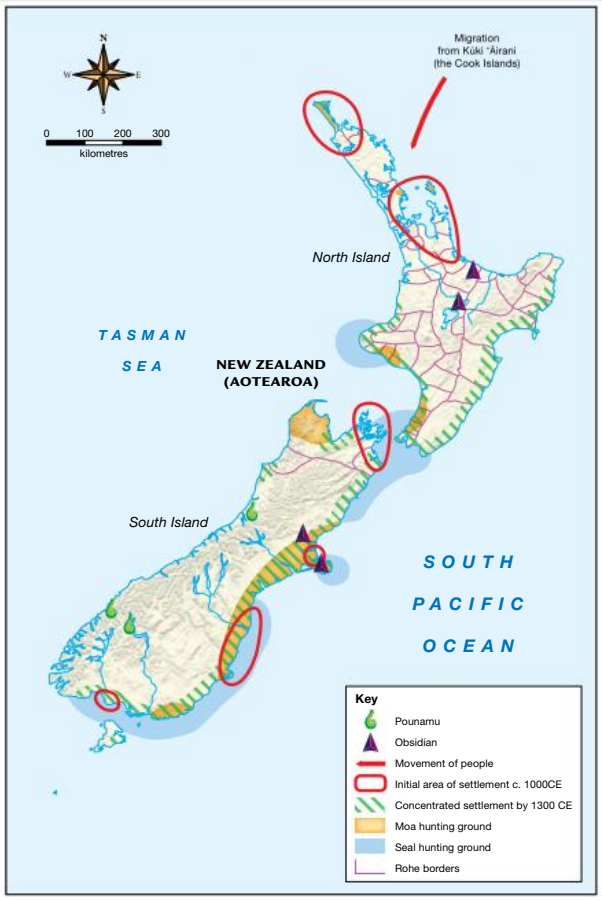
Archaeological evidence indicates that the western Pacific region, including South-East Asia, New Guinea and Australia, was settled long before the islands of New Zealand. Aboriginal and Torres Strait Islander Peoples arrived in Australia at least 50 000 years ago, and the Polynesian islands were settled more than 3000 years ago. In contrast, New Zealand was first settled only about one thousand years ago.

SkillBuilder discussion

Using historical sources

1. How did the geographic locations of the Māori settlements influence their way of life and culture?
2. Why were the hunting grounds of the moa significant for the Māori people, and what impact did this have on the society?
3. What role did the deposits of **pounamu** and obsidian play in the development of Māori tools and trade?

SOURCE 2 Areas of Maõ ri settlement, hunting grounds of the moa and deposits of pounamu and obsidian.



Source: Map drawn by Spatial Vision.

11.6.2 The geography of Aotearoa

The small coral **atolls** and volcanic islands in the Pacific gave the Polynesians a chance to farm and fish. Most Polynesian communities lived more from the sea than the land, but when they settled in Aotearoa (New Zealand), the Māori had to adapt to a new climate. They brought plants and animals with them and also used the natural resources of their new home.

Aotearoa was the last stop for Polynesian explorers and became their largest island home. The two main islands of New Zealand are bigger than all the other islands of Polynesia combined. Because of the big population and advanced technology, we know much more about life in Aotearoa than in other Polynesian cultures.

Aotearoa had a different climate and environment. This large and cold land had thick forests and huge trees reaching down to the coast. Volcanic activity created the central mountain ranges, covered in ice and snow, and a landscape with **thermal** springs, **geysers** and hot mud pools.

Millions of years ago, New Zealand was part of the supercontinent Gondwana, which included Australia and Antarctica. As Gondwana broke apart, the lands drifted away and were separated by seas. The seas around New Zealand are rough and swept by strong ocean currents.

Skillbuilder discussion

Communicating
Humans have learnt to exploit the environment to their own advantage. Discuss as a class how true this statement is with regard to Aotearoa.

SOURCE 3 An aerial shot of Whakaari, or White Island, and its active volcano. The island, uninhabited today, was a favourite hunting ground for Māori clans. In 2019, an unexpected eruption caught tourists on the island by surprise and led to 22 deaths.

11.6.3 The Māori

The first people of New Zealand are called the Māori, meaning 'original people'. By the time Captain Cook arrived in 1769, about 150 000 Māori lived in Aotearoa. The Māori named their land **Aotearoa**, meaning 'the land of the long white cloud'. According to legend, the first explorer to reach Aotearoa was the navigator Kupe and his wife. She saw a long white cloud and called it Aotearoa; the cloud helped them find the land.

In Māori culture, a person's status was very important. **Anthropologists** say Polynesian societies had a hierarchy, which means some people had higher ranks than others. A man's rank determined how much power he had in the iwi (tribe).

Māori development in Aotearoa

From the Polynesian arrival in Aotearoa to the modern day, historians divide the history of the Māori into four periods:

11.6.4 Carving out a history

Traditional Māori carving, known as *whakairo*, is famous for its detail and beauty, and took great skill to create. For this reason, the Māori held the talent of the wood carver in very high regard. The earliest carving tools were made from seashells and stone, such as obsidian, that were sharpened over many months in preparation for carving. The thick forests of Aotearoa provided a plentiful supply of high-quality timber for the Māori craftsmen.

SOURCE 4 Many paintings of early European arrivals to Polynesia, such as *View of Huaheine* by John Clevely the Younger, c. 1788, show a very romantic view of those early encounters.

The four periods of the history of the Māori

Ngā kākano (800–1200 CE)	Te tipunga (1200–1500 CE)
The East Polynesian or Archaic period, also referred to as Ngā kākano (meaning 'the seeds'), spanned from about 800 to 1200 CE. This is the time of the first Polynesian settlers and their immediate descendants. The people of this period are also known as the moa hunters. It was a time of discovery and adaptation to the new land. The farming way of life did not immediately develop in Aotearoa because the moa hunters survived well on a hunter–gatherer lifestyle.	The Te tipunga period (meaning 'the growth'), began on the North Island during the thirteenth century and had spread across Aotearoa by the sixteenth century. It was the era of expansion, when the Māori discovered and settled the more remote areas of their land and began developing their unique cultural traditions, beliefs and art.
Te puawaitanga (1500–1800 CE)	**Te huringa (1800–present)**
The Classical Māori period dated from the sixteenth to the nineteenth century. During this time, the earliest European explorers and settlers of Aotearoa recorded the features of Māori classical society and culture. This period is known as Te puawaitanga (the flowering), because it is regarded as the time when the most beautiful Māori art was created.	The final period from the nineteenth century to the present is known as Te huringa (the turning point), because it is the time of increased Māori contact with Europeans and the introduction of the modern world into Māori culture.

SkillBuilder discussion

Continuity and change

1. When do you think the photographs a) and b) were taken?
2. Do you think there were any significant changes in Māori carving techniques between the first and the second photograph?
3. Why were carvings like these made, and why are they still popular?

SOURCE 5 a) A modern Māori *whakairo* craftsman and b) an image from the past of a Māori elder next to a detailed carving

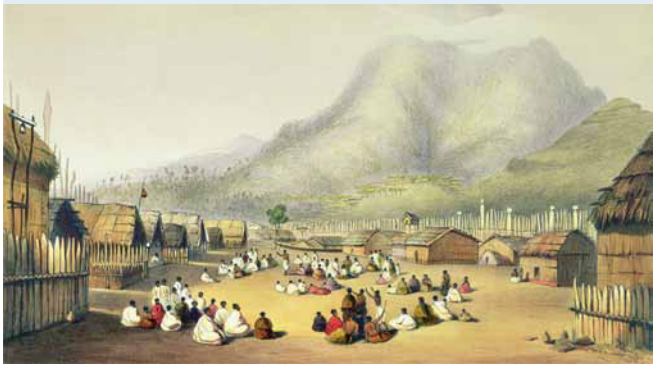
Māori carvings expressed religious beliefs, myths and images of gods. The finest examples of Māori art and carving were created for the *whare runanga*, the cultural centre of the village. Supporting posts were often carved with images of the seven waka ancestors, and interior wall panels featured ancestral figures. Bows of canoes also often displayed ornately carved and ferocious faces.

11.6.5 The community

The whanau was the family unit at the core of Māori society. Families and other members of the hapu (clan group) decided where people lived, who they married, who their friends were and who they fought. Village communities ranged in size from just a few families to over 500 people.

Land and most property were communally owned. Different families or tribal groups could have different rights to the same piece of land. For example, one family might catch birds in the forest while another might fish or grow crops in the same area.

SOURCE 6 *Tu Kaitote, the Pa of Te Whero Whero*, by George Angas. Painted c. 1845, this image shows a community meeting being held in the marae (courtyard).



The village

People gathered in the open courtyard, called the marae, in front of the formal meeting houses, known as the *wharenui*, for community meetings. The marae was the spiritual centre of the village where celebrations were held, the dead were mourned, guests were greeted, and important matters were discussed.

The traditional Māori *pa* (village) was often built on ridges and easily defended locations. Rivers and lakes provided natural barriers against enemy attacks. Defenses included trenches, earth ramparts and palisades made from large sharpened stakes lashed together.

The Māori were very successful farmers. Agriculture led to the construction of larger and more permanent village settlements. Village life was organised around food gathering, food growing and warfare.

11.6.6 Trade

Despite constant warfare, a network of trade developed between Māori tribes. Trade was important because food sources and natural resources were not evenly spread across the islands. Greenstone, called pounamu, was a type of jade found only in three small regions of the South Island. South Island tribes mined pounamu and shipped it by canoe to North Island coastal villages. Pounamu was the most valuable trade item, desired for its beauty and hardness. It was used to make weapons and ornaments. The South Island was named Te Wai Pounamu, meaning 'place of the pounamu'. According to Māori belief, pounamu came from the earth and was under the guardianship of the god Poutini.

11.6 SkillBuilder activity **HISTORICAL SIGNIFICANCE**

Māori culture has a strong presence in New Zealand today. In comparison, and although there are steps being taken, to recognise the impact of Aboriginal and Torres Strait Islander Peoples on modern culture and of European settlement on their way of life, there is still a long way to go.

1. **Explain** why you think New Zealand has been more effective in integrating Māori customs and culture into modern life.
2. **Propose** the steps Australia could take to recognise and integrate Aboriginal and Torres Strait Islander heritage more fully. Steps such as acknowledgement of country and official recognitions are excellent, but are very ceremonial. **Consider** what could be done more broadly in everyday life.

11.6 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 6, 8	7, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** what natural phenomena assisted the early navigators of the Pacific Ocean. **Select** all that apply.
   A. Knowledge of the constellations
   B. The behaviour of fish and whales
   C. Flight or migration patterns of birds
   D. The weather
   E. Sea currents and wave patterns
2. **State** whether the following sentence is True or False. The third period of Māori history is called 'the flowering'.
3. **State** why it is considered unlikely that the first voyages to New Zealand were accidental.

4. **Define** the following terms.

Māori	
Whakairo	
Iwi	
Te tipunga	

5. In your own words, **explain** how New Zealand came to be known as the 'land of the long white cloud'.

ANALYSE AND APPLY

6. Using **SOURCE 6**, **identify** natural and human-made defences that the Māori exploited or made to protect their village.
7. **Examine SOURCE 2**. **Identify** which period of Māori history it is depicting: Ngā kākano, Te tipunga or Te puawaitanga. **Justify** your answer.
8. **Clarify** why the concentrated settlements are mainly in coastal regions.

EVALUATE AND COMMUNICATE

9. **Compare** and **contrast** the discovery and settlement of Aotearoa to the experience on Rapa Nui.
10. Using the information in this lesson, **construct** a timeline reflecting the four periods of Māori history. Label each period with its key features, including the arrival of Captain Cook in New Zealand.

Answers and sample responses for this topic are available online.

LESSON 11.7 Were customs and culture the same everywhere?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **recognise** the artistic achievements of Polynesia
- **compare** the similarities and differences between several Polynesian cultures and consider how modern art helps with self-expression.

Tune in

Spiritual belief helps people explain the world around them and give reasons to the way things are.

How have societies in the past explained natural phenomena like:

- rain
- sunrise and sunset
- thunder and lightning
- the origins of language?

SOURCE 1 A geyser in Rotorua, New Zealand. This phenomenon can be explained through scientific study, but in the past it would have been understood to be a manifestation of mana.

11.7.1 Tapu and mana

Polynesian life was guided by a sacred law called tapu (or *kapu* in Hawai'i), meaning taboo. Breaking tapu could bring misfortune, sickness or death. For example, in Hawai'i, touching the shadow of the *ali'i* (chief) was punished because it was believed to steal his mana, a form of spiritual energy.

Mana was thought to be present in all things, living and non-living. The Māori believed their gods brought fire to their islands, which appeared as volcanoes and hot springs. The gods, or atua, were the sources of mana and tapu, and only their protection could save humans from evil. Objects declared tapu had to be respected; forests and fishing grounds could be tapu during certain seasons. Burial grounds were tapu, and the possessions of a dead person were tapu until cleansed by a spiritual leader.

11.7.2 The importance of art

Each Polynesian settlement was isolated, so unique art and culture developed independently. Art showed status and tribal differences, and became part of daily life. Even simple items like fishhooks were beautifully crafted. Possessions like canoes, paddles, musical instruments and gateways were decorated.

The Kānaka Maoli of Hawai'i created the hula, a dance and chant, after arriving to Hawai'i. **Petroglyphs** were found on many islands.

The Māori of Aotearoa used art and customs to show their culture and beliefs. The variety of materials available gave artists lots of options to create their work.

SkillBuilder discussion

Using historical sources

1. What is the significance of the petroglyph found on Rapa Nui in Polynesian culture and beliefs?
2. How did the isolated development of Rapa Nui influence the style and symbolism of this petroglyph?
3. Are there similarities between this petroglyph and other forms of Polynesian art, like tiki carvings?

SOURCE 2 A petroglyph found on Rapa Nui

11.7.3 Tiki

The art of woodcarving is central to many Polynesian cultures. Tiki is a term used by the Māori in the past to describe a large humanoid statue carved of wood. Its name comes from the story of the first man, Tiki, from whom everyone is descended.

Variations on this form of art can be found all over Polynesia, from the *ti'i* in Tahiti to the *ki''* in Hawai'i. While the Rapanui don't have this exact art, it resembles the mo'ai statues on their island. Tiki figures are common in many Polynesian cultures, and the term *tiki* means 'carving'.

The most valuable Māori carving was the *hei-tiki*. In classical Māori culture, the *hei-tiki* was worn by high-ranking men and women during ceremonies, often hanging from a flax cord around the neck. The *hei-tiki* represented a human figure, usually with the head tilted to one side and hands on hips. Each *hei-tiki* had its own name and family history.

The true meaning and origins of the *hei-tiki* are still not fully known. Some believe it comes from Māori mythology and the story of Tiki, the first man created by the god Tane.

SOURCE 3 A traditional *hei-tiki* ornament, showing the head tilted to one side and with hands on hips

11.7.4 Tatau

During his eighteenth-century journeys of exploration, Captain James Cook wrote about the Polynesian art of skin decoration known as *tatau.* The British called it 'tattoo'. Archaeologists believe that the Lapita people, ancestors of the Polynesians, were tattooed over 3500 years ago and carried the tradition with them on their great journeys of Pacific migration.

In Polynesia *tatau* came to have great cultural and spiritual importance. *Tatau* gave Polynesians status because it signalled strength and power. The most elaborate *tatau* were reserved for the chiefs and warriors. A straight blade or bone chisel was used to inject a sooty pigment into the skin, leaving a grooved scar with the appearance of a carving. Māori tattooists were regarded as master craftsmen who took many years to perfect their skills. The colonising British outlawed the practice because it was considered the devil's art, but it saw a revival in the twentieth century.

SOURCE 4 This early European depiction of a Māori ariki (chief) shows the intricately carved comb and jewellery that reflected social status. The tattooing is also visible.

Ta moko

The practice of classical Māori tattooing is called *ta moko*. In traditional Māori society, men were marked on the face, buttocks and thighs. Facial tattoo patterns were of greater significance to the identity of a person than their natural facial features. Women were tattooed on the face and breasts. The painful process was an initiation and rite of passage that took many years to complete.

Tatau represented culture and belief to the Polynesian people. Moko (tattoos) showed Māori rank, **genealogy** and tribal history. Moko designs were a personal statement of Māori identity that could never be lost or stolen. Only death could destroy the moko.

SkillBuilder discussion

Continuity and change

1. How long has tattooing (*tatau*) been a form of skin decoration?
2. What are some similarities and differences between the traditional Polynesian practice of *tatau* and modern tattooing practice?
3. Why do you think the practice of *ta moko* (classical Māori tattooing to the face, buttocks, thighs, breasts and hands) was outlawed by British colonisers?

SOURCE 5 Captain James Cook's description of the Māori moko

The marks in general are spirals drawn with great nicety and even elegance. One side corresponds with the other. The marks on the body resemble foliage in old chased [engraved] ornaments, convolutions of **filigree** work, but in these they have such a luxury of forms that of a hundred which at first appeared exactly the same no two were formed alike on close examination.

Did you know?

Legend says that *tatau* began when a young man called Mataora fell in love with a princess of the underworld called Niraweka. One day in a fit of rage Mataora struck Niraweka and she fled back to the underworld. He followed her and when he finally arrived at the realm of the underworld, his face paint was messed and dirty from the voyage.

He begged forgiveness for his wrongdoing but was mocked for his unkempt appearance. However, he was forgiven and Niraweka's father offered to teach Mataora the art of *ta moko*, which he then brought back to the human world.

11.7 SkillBuilder activity COMMUNICATING

Art today doesn't always have a spiritual significance, but it is always an expression of culture. Just like the people of Polynesia, we express ourselves through architecture, song, body modification and other aesthetic choices.

1. **Identify** how we modify our bodies today for the purposes of beauty.
2. **Explain** what self-expression comes from altering your body. **Explain** why you think people are so keen to change things about themselves.
3. Polynesian culture is integrated into many modern cultures. In 2020, Nanaia Mahuta was elected New Zealand's Foreign Minister. She has traditional *ta moko* face tattoos.**Explain** what this tells you about the acceptance of Polynesian culture in New Zealand and abroad.

11.7 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 4	2, 5, 9	6, 7, 8, 10

REMEMBER AND UNDERSTAND

1. **Identify** what the *whakairo* expressed. Select all that apply.
   A. Religious beliefs
   B. Myths
   C. Animals
   D. Images of gods
   E. Family members
2. Archaeologists believe that in classical Māori culture the _____ was worn only by people of the highest rank.
3. **Determine** whether each of the following statements is True or False.
   a. Fabric, clothing and ornaments helped Māori society differentiate status.
   b. Men wore combs in their hair and intricate jewellery.
4. **State** three reasons why art was valued in Māori culture.
5. **Explain** how the Māori exploited their natural environment to create *whakairo*.

ANALYSE AND APPLY

6. **Explain** why the *hei-tiki* was only worn by Māori of high rank.
7. **Examine SOURCES 2** and **3**. **Explain** what conclusions you can make about Māori craftsmanship.
8. Using **SOURCE 5** as evidence, **interpret** Captain Cook's attitude towards *ta moko*.
9. **Identify** four features in **SOURCE 4** that convey the status of this Māori ariki (chief).

EVALUATE AND COMMUNICATE

10. Using the sources in this lesson, **summarise** how dress and ornament were used to display position in Māori society.

Answers and sample responses for this topic are available online.

LESSON 11.8 What happened when Polynesians settled and stayed?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **understand** the impact that humans can have on local plant and animal life
- **reflect** on why people come into conflict describe the lifestyle of the Māori and the way they built their villages.

Tune in

The takahe (a flightless bird) was hunted almost to extinction. Today, many other species are facing the same fate due to climate change, impacts on their environment and human actions.

Mind-map some ways that we can reduce our impact on at-risk species. You might like to focus on one particular group, such as:

- numbats
- bandicoots
- elephants
- turtles
- rhinos.

SOURCE 1 The takahe

11.8.1 Living with a new land

While all Polynesian cultures share common ancestry, they are unique in many ways, such as clothing, food, language and art. The Māori settlement in New Zealand is well-documented and serves as a good example.

Initially, the Māori lived according to their ancient customs, despite the new climate. They brought plants like taro, yam, **gourd**, and **kumara**. They also introduced the kiore (rat) and kuri (dog). Settlements spread along the coasts, and the Māori learned to hunt, fish and use native plants like the New Zealand cabbage tree and flax for food and cloth.

11.8.2 Rāhui

Polynesian settlers had to adapt to their new environments. The concept of *rāhui* (prohibition) was used to prevent overuse of resources. It ensured that natural resources weren't depleted, allowing the land to recover. For example, a *rāhui* might be placed over an area to stop food gathering temporarily. This practice helped conserve food supplies and was accepted by all Māori tribes.

Sadly, some environmental damage occurred before *rāhui* could help. The introduction of dogs and cats destroyed habitats of flightless birds like the takahe, almost leading to their extinction. The moa, another flightless bird, was hunted to extinction. The Māori used moa meat, large eggs, bones and shells for food, ornaments, fishhooks and water containers. Moa meat was preserved and traded.

Did you know?

There are many examples of flightless birds around the world, including the emu, cassowary, kiwi and penguin, but the moa was unique — it had no wings. All other birds have some form of wing, even if it is a small stub of 'evolutionary leftovers'. But the moa simply had no appendages at all where wings would normally be.

11.8.3 The *pa*

The extinction of the moa threatened the Māori people's survival. Thankfully, they still had timber for boats, allowing many tribes to migrate when the moa vanished. This migration caused the South Island's Māori population to decrease.

Around the fifteenth century, larger permanent settlements began to form. The Māori had to rely on other food sources like shellfish and *aruhe*, a fern root that added much-needed carbohydrates to their diet. Though hard to prepare, *aruhe* became a staple even when taro or sweet potatoes were available.

Gardening replaced hunting as the main food source, increasing land competition and the use of slaves for hard labour. These changes marked the start of the Classical period in Māori history.

The *pa*, or fortified village, emerged during this time. Māori lived in whare (houses) within these villages. The floors of the whare were dug out to retain heat. The whare's construction varied by location and tradition, often featuring a framework of manuka tree branches and raupo leaves.

There were many aspects to the *pa*, as shown in **SOURCE 2**.

SkillBuilder discussion

Continuity and change

1. How do you think the construction of the whare (houses) within the *pa* helped the Māori people adapt to their environment?
2. What can you infer about the social and cultural structure of the Māori community based on the layout and features of the *pa*?
3. Why do you think the *pa* was fortified, and how might this have impacted daily life and interactions with neighbouring tribes?

SOURCE 2 A modern artist's impression of a Māori *pa*

A Storage pits covered by low roofs, often used for storing vegetables

B *Pataka* — storehouses built on platforms so rats and dogs could not steal the fish, meat, berries, and other food and goods. Weapons and other valuables were also kept in the pataka.

C Shelters for canoes and cooking sites

D *Whare runanga* — the meeting house was the focus of all cultural and tribal activities. It was a sacred building filled with symbolism. The house construction represents a man's body, with the first **rafter** being his extended arms stretching down to his fingers. The rafters following the arms represent the man's rib cage. A *tekoteko* carving is located at the front peak of each *whare runanga*. The *tekoteko* represents a protective tribal ancestor standing watch over the marae (courtyard). The ancestor's protective power is known as the mana.

E The village water source was not usually located within the boundary of the wooden fence. Water was carried every day from the outside wells and rivers. Firewood was also collected from afar. A large area of countryside was needed to provide the tribe with food. Gardens of kumara (a type of sweet potato) were dug with long wooden sticks called *ko*.

F *Whare whakairo* (carved house) — the family home of the village rangatira. A large pit filled with hot rocks was located at the centre of the *whare whakairo* to keep the family warm at night.

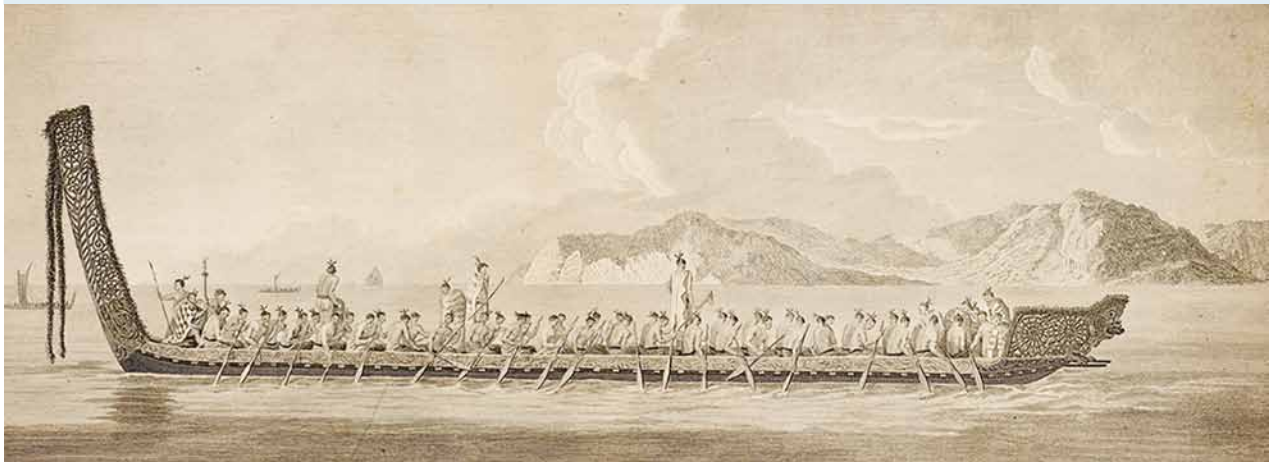
11.8.4 Warfare

Power in Polynesian societies, including the Māori, could be inherited or gained through war. From early times, warfare and the role of the warrior were vital parts of Polynesian culture. Leaders in Tonga, Hawai'i and Aotearoa maintained authority with punishment, rituals and battle.

Wars could start over insults, kidnapping, land or resources. In Otaheite (Tahiti) and Aotearoa, frequent tribal warfare prevented a single ruling family from taking control. Sometimes large tribal groups would temporarily unite under a supreme chief for bigger wars, hunting or trade.

Every Polynesian island has stories of fierce conflicts over land or power. Polynesian warfare could even mean large invasions involving thousands of warriors.

SOURCE 3 The Māori war canoe was up to 40 metres long and could carry dozens of warriors. It was formed from a large hollowed-out tree trunk that was then intricately carved and decorated, as shown in this etching, c. 1773.



Some of the first Europeans in New Zealand in the early nineteenth century were impressed by the courage of the Māori, but also shocked by the violence and incidence of **cannibalism**. The rangatira (chief) of a defeated tribe could be eaten by the enemy as a symbol of their victory and the end of his mana (power). The heads of important fallen enemies were preserved by smoking and oiling.

SOURCE 4 Prior to charging the enemy, Māori warriors often performed a war dance (haka), both to prepare themselves mentally for the battle and to strike fear into the enemy.

11.8 SkillBuilder activity HISTORICAL QUESTIONS

Within this lesson, there is a lot more discussion about Māori lifestyle than other Polynesian cultures.

1. **Explain** why there is such a wealth of knowledge available on Māori history compared to other Polynesian cultures.
2. **Determine** what information is not included about Hawai'i, Rapa Nui or any other Polynesian culture which you think would be interesting to know.
3. a. **Investigate**, by conducting research, and collect a series of primary and secondary sources on a Polynesian culture of your choice.
   b. **Discuss** how they adapted to the land they found themselves in and built a new life from the roots of Hawaiki.

11.8 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 6, 9	7, 8, 10

REMEMBER AND UNDERSTAND

1. Warfare was integral in Polynesian societies, with weapons being carved from wood or **stone** / **bone** / **clay**. Warfare was an important expression of **power** / **culture** / **insecurities**. In Polynesian societies, warriors were held in high esteem from earliest times. Warfare was used to gain and protect property including land, to avenge kidnappings and killings, and to **visit** / **purchase** / **invade** other islands.
2. **Determine** whether the following sentence is True or False. The Māori population of the South Island decreased due to war.
3. **Identify** the strategies the Māori people used to intimidate enemies. Select all that apply.
   A. Ritual dance (haka)
   B. Firing cannons
   C. Shrunken heads of fallen enemies
   D. Fighting at close quarters
   E. Sneak attacks
4. **Explain** how the construction of the *pa* (Māori village) reflects Māori values and customs.
5. **Explain** the meaning of *rāhui*. What was its benefit?

ANALYSE AND APPLY

6. **Examine SOURCE 3**. **Identify** what other warrior culture this scene resembles.
7. **Explain** what you can **determine** about Māori warfare from the size of this vessel in **SOURCE 3**.
8. Using evidence from the sources as well as the information in the lesson, **propose** reasons why the Māori developed such a strong warrior culture.

EVALUATE AND COMMUNICATE

9. **Explain** whether the personal qualities of the ariki — wisdom, authority, excellence and inherited power — have modern-day equivalents. **Identify** a profession or position in which these characteristics are valued.
10. Imagine you are a visitor to a *pa*. Refer to **SOURCE 2** and the text to **construct** a diary entry recording a typical day of village life. Provide details of the daily activities you see taking place, the *pa* layout, and the design and purpose of the buildings.

Answers and sample responses for this topic are available online.

LESSON 11.9 Inquiry: Religion in Polynesia

LEARNING INTENTION

By the end of this lesson you should be able to better understand the complexity of religion in Polynesia and its influence historically.

The Polynesian **cosmology** is diverse and complex, and each new branch of explorers built their own version. Below is a collection of major **deities** from Rapa Nui, Hawai'i, and Aotearoa.

Rangi and Papa	Māui	Hina/Sina
Kāne	Kanaloa	Lono
Kū	Make-make	Hotu Matu'a
Tangata manu	Haumiatiketike	Tangaroa

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching

Select three of the deities from the table above to research and find answers for. Use the questions below to guide your **research**. You may also come up with some of your own.

- What culture do they belong to?
- What are they responsible for?
- How do they fit into the **pantheon**?
- Are there gods in one of the other Polynesian pantheons who match them or are similar?

Research the questions. Be sure to use multiple reliable sources.

Step 2: Using historical sources

As a historian, you need to be able to **identify** sources and their usefulness to answering your question. An OPCVL analysis is a great way to quickly **identify** information about sources.

Origin	• Who created it? • When was it created? • Where was it created? • Is it a primary or secondary source?
Purpose	• Why was this created? • Who is the intended audience?
Content	• What information is included? • Is the language objective or does it sound exaggerated or one-sided?
Value	Overall question: why is this source helpful to a historian? • Is the author/creator credible/reliable? • Do we see the whole story?
Limitations	Overall question: why is this source helpful to a historian? • What is purposefully/accidentally left out? • Is the author/creator biased and trying to show only one side of the story?

When **examining** primary sources, asking these sorts of questions can really help guide your thinking. For instance, if you find a carving or visual representation of a deity, ask yourself these questions before including it (not all questions will apply to every source). Sometimes it can help you avoid less reliable or useful sources.

Step 3: Historical perspectives and interpretations

Because there is so little surviving physical evidence of Polynesian culture from pre-colonial times, we need to rely a lot on European writing from this time. Refer to lesson 11.2 for a deeper exploration of these themes.

When examining evidence about Polynesia, take the time to complete an OPCVL analysis (Step 2). A biased source is not a negative thing — sometimes it can reveal a lot more because of the bias! Try to identify a range of sources you can use to support your **discussion**.

Step 4: Communicating

Write out one of the stories surrounding a Polynesian deity. There are some who have many, such as Māui, and some who are only mentioned in the myths about others. Pick one that you think is particularly interesting and retell it in your own way.

Complete your self-assessment using the **Inquiry rubric** or access the 11.9 exercise set to complete it online.

LESSON 11.10 Review

11.10.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

11.2 How do we know about the Polynesian expansion across the Pacific?

- Understanding the history of Polynesia is difficult because of the lack of written sources.
- Some physical sources have survived, but due to the materials they are made of, they're difficult to find.
- It's important to keep in mind the colonial (mainly European) perspective that comes from written sources. Referring to Polynesian communities using their traditional names can help remove this bias.

11.3 Exploring the Polynesian Triangle

- The Polynesian Triangle is a large area of the Pacific Ocean, over 2 000 000 square kilometres, where island communities have formed.
- There are more than 20 000 islands, some of which are very small, in the area explored by these settlers.
- The people of Polynesia used their advanced understanding of seafaring to navigate to new islands and settle there.
- Movement across the Pacific spanned 10 000 BCE to 1500 CE.

11.4 What happened on Rapa Nui?

- Rapa Nui is also called Easter Island and is the furthest east of all Polynesian settlements.
- Rapa Nui is covered with mo'ai, enormous stone statues depicting former ariki (chiefs). Many of these stand on *ahu*, stone platforms near the ocean.
- The population and plant life of Rapa Nui was in decline when it was visited by European explorers. This could have been due to overuse of the forests, conflict between people, or the introduction of rats by the earliest settlers.

11.5 What was life like in Hawai'i?

- Settlers could have arrived in Hawai'i as early as the third century CE, and were later invaded by people from Otaheite (modern Tahiti) in 1300 CE.
- The people of Hawai'i called themselves the Kānaka Maoli and had a very rigid caste system.
- It is very unlikely that people arrived in Hawai'i accidentally. In 1976, the *Hōkūle'a*, a *wa'a kaulua* (double-hulled canoe) built in the traditional style, made the voyage from Hawai'i to Tahiti and back, demonstrating that it was not only possible but likely that they planned to make the trip.
- The people of Hawai'i were experts at fishing and established fish ponds to effectively and sustainably farm fish.

11.6 Who were the people of Aotearoa?

- Between 800 and 1130, a group of settlers arrived from Kūki 'Āirani (the Cook Islands) to the coast of what would become Aotearoa. These people became known as the Māori.
- The Māori named their land *Aotearoa*, meaning 'the land of the long white cloud' because of the cloud that helped them find the land.
- The Māori, like many other Polynesian cultures, used wood to carve depictions of stories and express religious beliefs, myths, and images of gods.
- Māori people lived in communal villages. Property was communally owned and they relied on their ability to farm to build larger and more permanent settlements.
- The Māori traded many goods, but pounamu (greenstone) was the most valuable. It was found on *Te Wai Pounamu* (South Island).

11.7 Were customs and culture the same everywhere?

- Almost all Polynesian communities practised tapu (taboo), which helped them govern their actions towards each other and the land around them.
- Mana (spiritual energy) was affected by tapu and was used by Polynesians to explain the world around them.
- Art was very important to all Polynesian communities. Although they came from the same roots, each new settlement developed its own set of customs and traditions, including art.
- *Tatau* (tattoo) was practised all throughout Polynesia. Examples of *tatau* have been found in Lapita art as well.

11.8 What happened when Polynesians settled and stayed?

- The people of Polynesia had a great impact on their environment. Many adapted effectively but some kept their traditional ways.
- *Rāhui* (prohibition) was tied to the concept of tapu and helped Polynesians avoid overusing the resources available to them.
- Warfare and conflict were present in many Polynesian communities. The Māori in particular fought over resources and land in Aotearoa and built their villages to be defensible.

11.9 Inquiry: Religion in Polynesia

- The Polynesian cosmology is diverse and complex, and each new branch of explorers built their own version.

11.10.2 Key terms

anthropologist a person who studies the culture and beliefs of different groups of people
archipelago an area that contains a chain or group of islands scattered in lakes, rivers or the ocean
atoll a circular coral island often enclosing a lagoon
cannibalism the practice of eating human flesh
caste a social status which is set by birth and passed down from one's parents and family members
cosmology the world view of a group of people, including gods, goddesses, creation stories and explanations for the way things are
deity a god or goddess
double-hulled canoe a canoe with two connected parallel hulls — a feature that made it light, fast and stable
filigree a type of delicate ornament made from fine threads of metal
genealogy the study of the past and present members of a family
geyser a hot spring that sends a jet of steam and boiling water into the air
gourd an edible fruit with a shell that can be dried and used for storage
kumara sweet potato
obsidian a type of rock that is almost like glass
pantheon the collection of gods, goddesses and other deities worshipped in a religion
petroglyph a form of art where rocks are carved with images
pounamu a term for several types of hard green stone found in New Zealand which were highly valued by the Māori
rafter sloping timbers supporting the outer covering of a roof
taro the root of a plant that is made edible through boiling
thermal relating to heat or temperature
trolling lure a hook designed to trail behind a boat or canoe and mimic dying, injured or fast-moving prey
yam a potato-like tropical plant used as food

11.10.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview:

What is significant about the Polynesian people and their lives?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry questions, outlining your views.

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Post-test	Online post-test
eWorkbook	Customisable worksheets for this topic (ewbk-14248) Reflection (ewbk-10718)
Digital document	Key terms glossary (doc-43125)

11.10 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
4, 5, 7, 9, 11	1, 2, 3, 8, 12, 13	6, 10, 14, 15

REMEMBER AND UNDERSTAND

1. Which of the following could be found within the boundary of a Māori *pa*? Select all possible answers.
   A. Village water source
   B. Storage pits
   C. Meeting house
   D. Cooking sites
2. 'Polynesia' refers to:
   A. the traditional name of Easter Island.
   B. the traditional name of Hawai'i.
   C. the traditional name of New Zealand.
   D. a large area in the Pacific Ocean.
3. Rāhui refers to:
   A. the spiritual energy in all things.
   B. the inked markings many Polynesians had on their skin.
   C. a way of managing the land.
   D. a double-hulled canoe.
4. The *Hōkūle'a* set sail in:
   A. 1966.
   B. 1976.
   C. 1986.
   D. 1996.

5. Polynesian history is difficult to study because:
   A. there are so many different cultures to keep track of.
   B. much of the history has been lost to climate change.
   C. most Polynesian cultures didn't have a written language.
   D. all of the above.
6. In Aotearoa, pounamu was:
   A. the totem at the centre of the village.
   B. a precious green stone.
   C. the first name of the newly settled land.
   D. a type of seal.
7. Why did the Kānaka Maoli use fish ponds for farming food?
   A. It was more sustainable.
   B. It gave them a regular food supply.
   C. It was more effective.
   D. All of the above.
8. How large is the Polynesian Triangle?
   A. Approximately 1 000 000 square kilometres
   B. Approximately 2 000 000 square kilometres
   C. Approximately 3 000 000 square kilometres
   D. Approximately 4 000 000 square kilometres
9. Polynesian explorers used *rebbelibs* (stick charts) to navigate between islands. The shells on these charts represented:
   A. islands.
   B. currents.
   C. waves.
   D. birds.
10. Captain Cook visited:
   A. Hawai'i.
   B. Aotearoa.
   C. Rapa Nui.
   D. all of the above.

ANALYSE AND APPLY

11. **Describe** what the mo'ai are and why they are found all over Rapa Nui.
12. **Explain** why the most ornate carvings were reserved for the *whare runanga* in Māori culture.
13. In your own words, **define** *mana* and *tapu*.
14. **Explain** why it's important to recognise the traditional names of the areas in this topic.
15. **Explain** what signs Polynesian settlers would look for to guide them to new islands.

Answers and sample responses for this topic are available online.

12 Geographical concepts and skills

LESSON SEQUENCE

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12.4 SkillBuilder: Concluding and decision-making ..... online only
12.5 SkillBuilder: Communicating ..... online only
12.6 SkillBuilder: Reading contour lines on a map ..... online only
12.7 SkillBuilder: Recognising land features ..... online only
12.8 SkillBuilder: Using latitude and longitude ..... online only
12.9 SkillBuilder: Calculating distance using scale ..... online only
12.10 SkillBuilder: Drawing simple cross-sections ..... online only
12.11 SkillBuilder: Interpreting an aerial photo ..... online only
12.12 SkillBuilder: Understanding thematic maps ..... online only
12.13 SkillBuilder: Drawing a line graph using Excel ..... online only
12.14 SkillBuilder: Using positional language ..... online only
12.15 SkillBuilder: Constructing a field sketch ..... online only
12.16 SkillBuilder: Creating and describing complex overlay maps ..... online only
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LESSON 12.1 Overview

INQUIRY QUESTION

Why is geography important to study, and what skills do I need to understand geography?

Studying Geography helps you and your community by building essential knowledge and skills for the present and future. These concepts will aid not only in Geography but also in everyday tasks like navigation. It might even benefit your future career in Australia or abroad. You will explore topics that enhance your understanding of local and global environments and investigate pressing issues for the future.

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eWorkbook
Customisable worksheets for this topic

Digital document
Key terms glossary

Video eLesson
Geography concepts and skills

SkillBuilder

Use the SkillBuilder activities to develop these Geographical concepts and skills:

- **GEOGRAPHICAL INQUIRY**
- **CONCLUDING AND DECISION-MAKING**
- **COMMUNICATING**

LESSON 12.2 Geographical concepts and skills

LEARNING INTENTION

By the end of this lesson you should be able to:

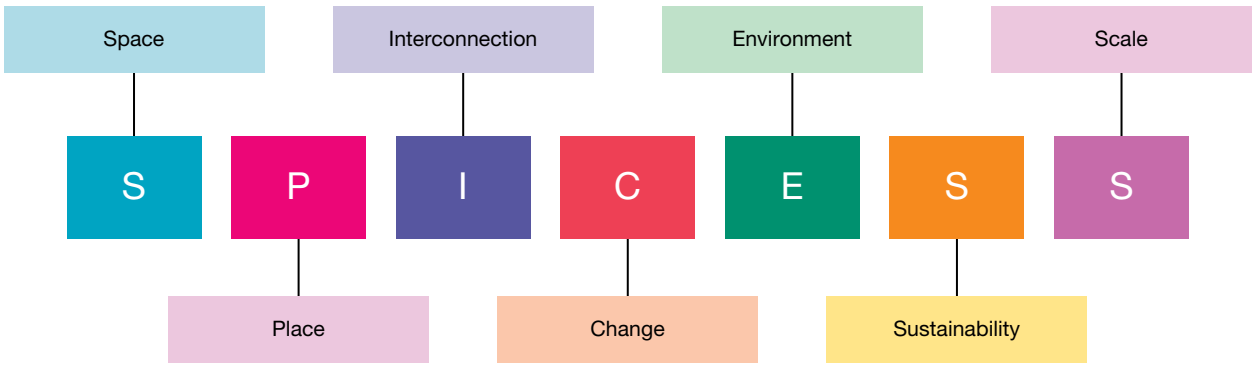
- **identify**, **explain** and **apply** the seven Geography concepts using the acronym SPICESS
- **apply** the skills that geographers use.

12.2.1 Geographical concepts: SPICESS

Geographical concepts help you to make sense of your world. By using these concepts, you can investigate and understand the world you live in. The concepts help you to think geographically. There are seven major concepts: **space**, **place**, **interconnection**, **change**, **environment**, **sustainability** and **scale**.

You will use the seven concepts to investigate two units: *Landscapes and landforms* and *Changing nations*.

FIGURE 1 A way to remember these seven concepts is to think of the acronym SPICESS.



12.2.2 What is space?

The concept of space focuses on the location and distribution of things on the surface of the Earth. The space can be organised and managed by people or it can simply be where things are located in the natural environment.

When referring to space in Geography, location can be absolute or relative.

- Absolute location is the unique location of a site or geographical feature. For example, the absolute location of Shepparton is 36°22' south longitude and 124°24' east latitude.
- Relative location is the location of a place or feature in relation to other places. It can be described by direction and distance from other places and features. For example, Shepparton is 189 km NNE of Melbourne.

A place can be described by its absolute location (latitude and longitude) or its relative location (in what direction and how far it is from another place).

12.2.3 What is place?

The world is made up of places, so to understand our world we need to understand its places by studying their variety, how they influence our lives and how we create and change them.

Places may be natural (such as an undisturbed wetland) or highly modified (like a large urban conurbation).

Place refers to how people perceive a location. You often have mental images and perceptions of places — your city, suburb, town or neighbourhood — and these may be very different from someone else's perceptions of the same places.

SkillBuilder discussion

Concluding and decision-making

1. What challenges would you imagine that people living in the Paraisopolis favela face?
2. Would the residents of the favela have a different sense of 'place' to that of the residents of the wealthier areas?

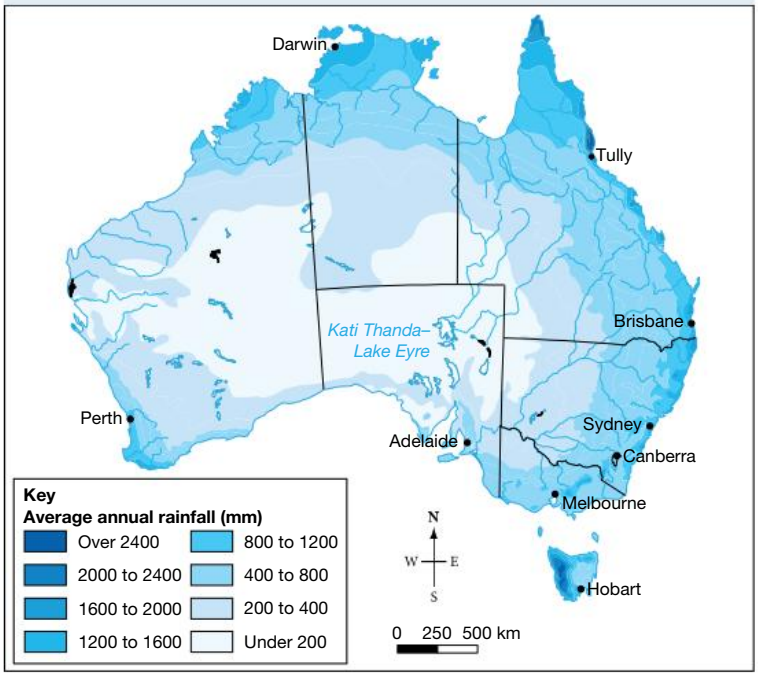
FIGURE 2 The Paraisópolis favela (slum), home to 60 000 people, is situated next to the gated complexes of the wealthy Morumbi district of São Paulo in Brazil.

12.2.4 What is interconnection?

People and things are connected to other people and things in their own and other places. Understanding these connections helps us to understand how and why places are changing. The concept of interconnection emphasises that no object of geographical study can be viewed in isolation. It is about the ways that geographical phenomena are connected to each other through environmental processes, the movement of people, flows of trade and investment, the purchase of goods and services, cultural influences and the exchange of ideas and information.

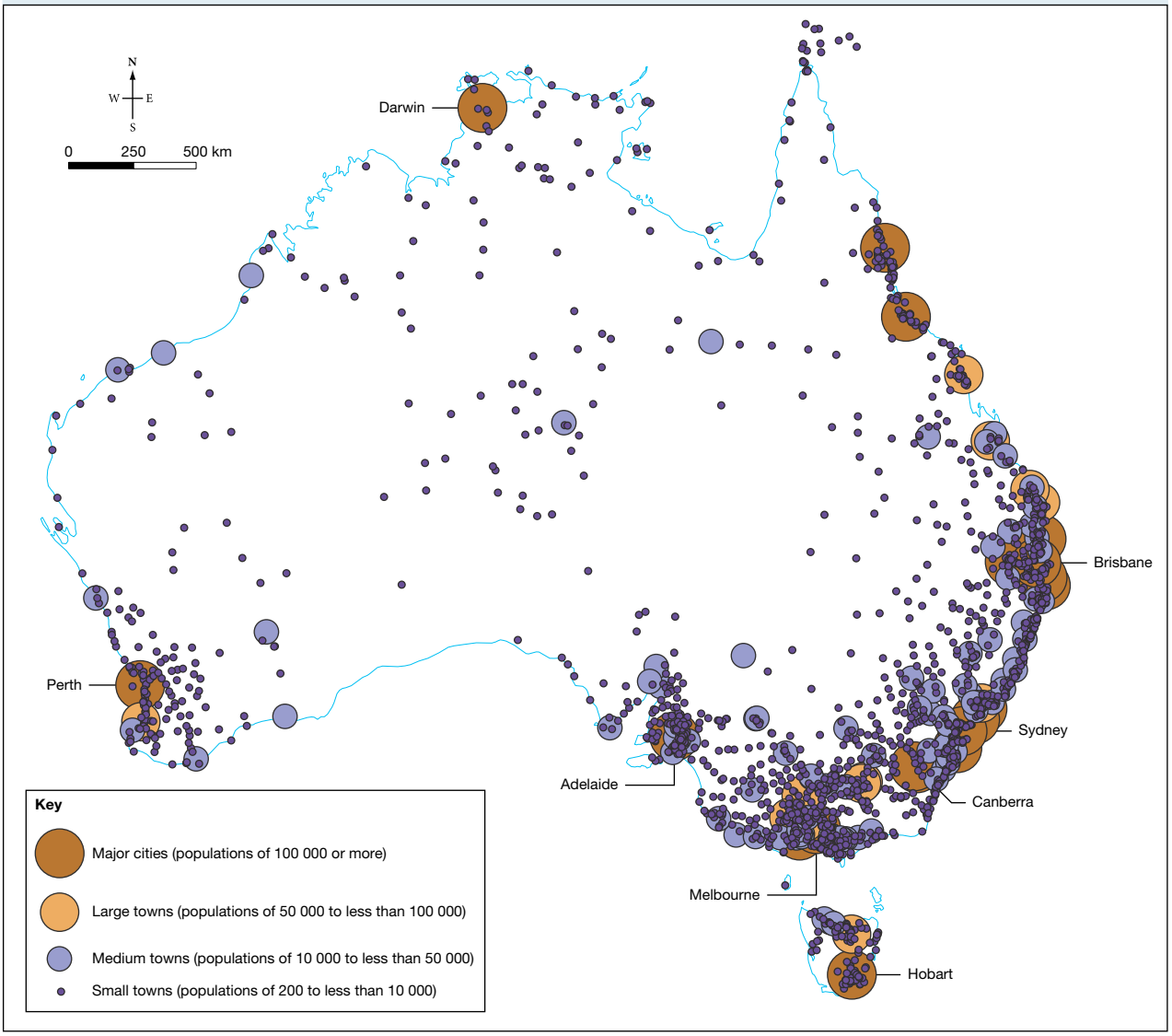
An event in one location can lead to change in a place some distance away.

FIGURE 3 Distribution of annual rainfall in Australia



Source: MAPgraphics Pty Ltd, Brisbane

FIGURE 4 Australia's population distribution and density



Source: Australian Bureau of Statistics

SkillBuilder discussion

Geographic inquiry

Look at **FIGURES 3** and **4**. Do these factors lead to change elsewhere? Are rainfall and population interconnected?

12.2.5 What is change?

The concept of change refers to using time to better understand a place, an environment, a spatial pattern or a geographical problem.

Some changes can be fast and easily observed; others are very slow. For example, cities can expand outwards over a number of years. Similarly, landforms generally change very slowly, as with the formation of mountains. But some landscape change can be very fast, as is the case with landslides, volcanic eruptions and deforestation.

FIGURE 5(a) Landscape before deforestation

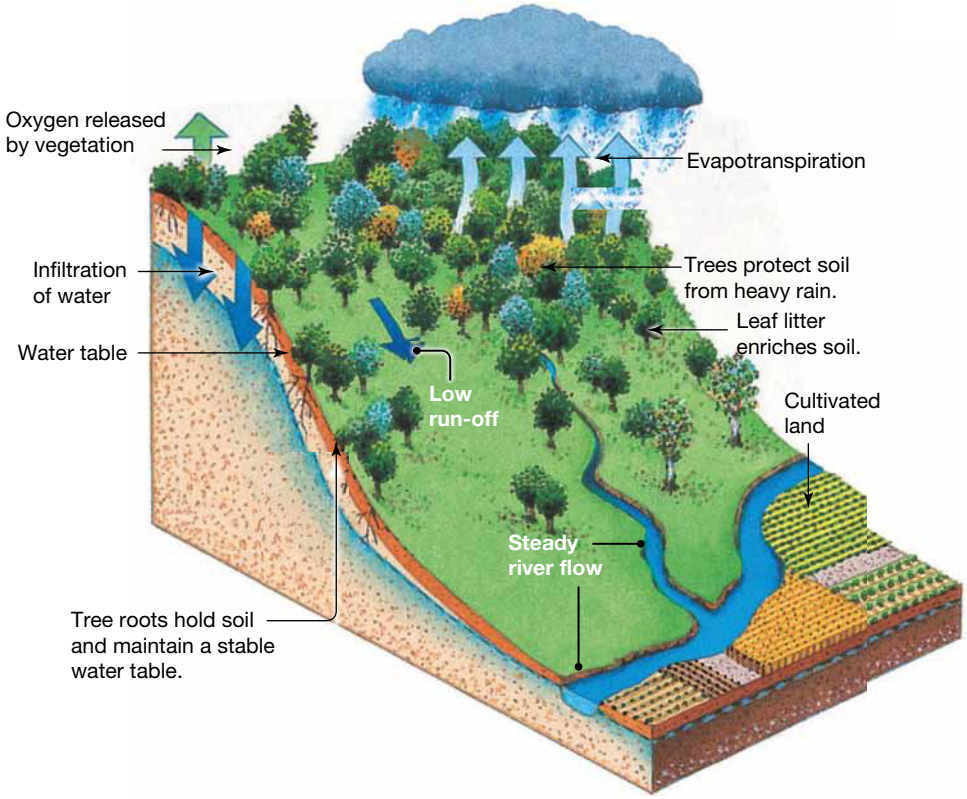
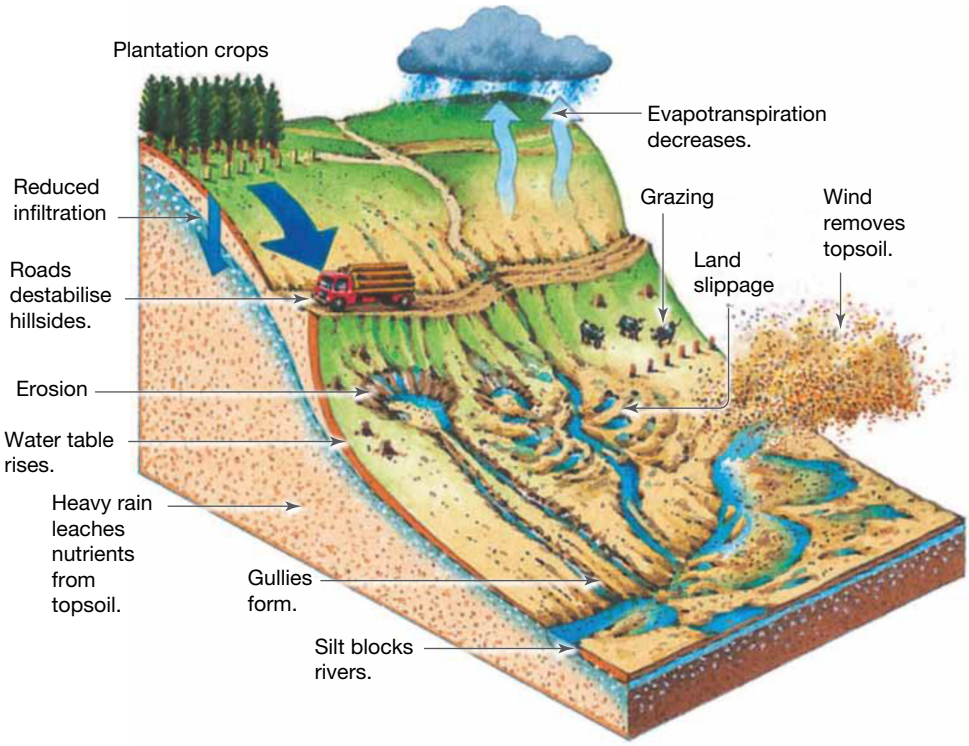


FIGURE 5(b) Landscape after deforestation



SkillBuilder discussion

Geographical inquiry

1. Look at **FIGURES 5 a** and **b**. Describe the scenes before deforestation and after deforestation.
2. What are the most significant changes?

12.2.6 What is environment?

People live in and depend on the environment, so it has an important influence on our lives.

The environment is the physical and biological world around us. It supports and enriches human and other life by providing raw materials and food, absorbing and recycling wastes, and being a source of enjoyment and inspiration to people.

12.2.7 What is sustainability?

Sustainability refers to the capacity of the environment to support our lives and those of other living creatures.

Sustainability is about the interconnection between the human and natural world, and who gets which resources and where. It involves the use of resources in a responsible way that doesn't exhaust them for future generations.

FIGURE 6 An image of a 'shelterbelt'. Shelterbelts are a sustainable farming practice, where land is divided by trees and shrubs.

FIGURE 7 Melbourne Airport is developing a solar panel network designed to generate enough energy to power all of its terminals.

SkillBuilder discussion

Geographical inquiry

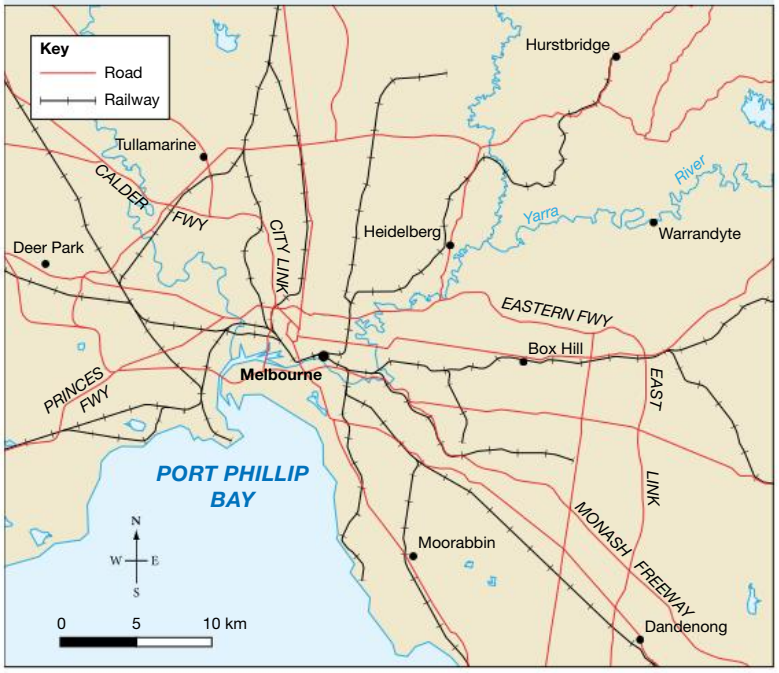
1. Look at **FIGURE 6**. List the ways that shelterbelts are sustainable.
2. Consider **FIGURE 7**. Explain how this is sustainable in a geographical sense.

12.2.8 What is scale?

When we examine geographical questions at different spatial levels, we are using the concept of scale to find more complete answers.

Scale can vary from personal and local to regional, national or global. Looking at things on a range of scales provides a deeper understanding of geographical issues.

FIGURE 8 Melbourne, Victoria. Building sustainable communities means we must work at various scales.



Source: Department of Environment, Land, Water and Planning

Ways to improve sustainability at the local scale include:

- reducing the ecological footprint
- protecting the natural environment
- increasing community wellbeing and pride in the local area
- changing behaviour patterns by providing better local options
- encouraging compact or dense living
- providing easy access to work, play and schools.

Ways to improve sustainability at the city scale include:

- building strong central activity areas (one major hub or a number of activity areas)
- reducing traffic congestion
- protecting natural systems
- avoiding suburban sprawl and reducing inefficient land use
- distributing infrastructure and transport networks equally and efficiently to provide accessible, cheap transportation options
- promoting inclusive planning and design
- providing better access to healthy lifestyles (e.g. cycle and walking paths)
- improving air quality and waste management
- using stormwater more efficiently
- increasing access to parks and green spaces
- reducing car dependency and increasing walkability
- promoting green spaces and recreational areas
- demonstrating a high mix of uses.

FIGURE 9 Activity and green areas in a Melbourne suburb

12.2.9 Skills used in studying Geography

As you become more familiar with Geography, there are three essential skills to practise and master. The SkillBuilder lessons in this topic will show you how to apply the skills related to the topics covered in this subject.

TABLE 2 There are three broad geographical skills that you need to develop in Year 8.

Geographical skill	Description
Geographical inquiry	You will develop questions for a geographical inquiry related to a phenomenon or issue. Collect and process information from primary and secondary sources, including fieldwork. Use geospatial technologies and digital tools to make decisions and come to conclusions. You will also use a range of formats, including maps and geospatial technologies to explain patterns, relationships and trends in information presented: issues such as wealth and liveability or the relationship between mountain ranges and rainfall.
Concluding and decision-making	Geography is all about making decisions and coming to conclusions in an evidence-based manner. You will consider ethical values and analyse data using the concepts of space, change, interconnection and environment. For example, you could be using an analysis of the distribution of water to determine the sustainability of a farm.
Communicating	Communicating your ideas and justifying your conclusions are key skills you will develop in Geography. Using geographical concepts and knowledge and a range of digital and non-digital formats, you will seek to express your thoughts on a wide range of concepts and issues. When communicating in Geography, you need to ensure that you consider your audience, acknowledge your sources and choose appropriate methods of communication to ensure your message is clear and well-conceived. In Year 8, you will be expected to explore new ways of presenting information, take risks and develop new presentation skills.

12.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
3, 5, 7	1, 2, 6, 8	4, 9, 10

REMEMBER AND UNDERSTAND

1. How does the concept of 'place' influence human activities?
   - **A.** It is a physical location with a specific address.
   - **B.** It holds meaning and significance for individuals or groups.
   - **C.** It is characterised by a particular climate.
   - **D.** It is a space used for human activities.
2. What role does interconnection play in geography?
   - **A.** It separates regions from one another.
   - **B.** It shows how features and processes are related and affect each other.
   - **C.** It identifies isolated geographical locations.
   - **D.** It maps the boundaries of continents.

3. Which of the following best defines the concept of 'space' in geography?
   A. The arrangement of objects and people on the Earth's surface
   B. The physical distance between two locations
   C. An area with defined boundaries
   D. The atmosphere surrounding the Earth
4. What does sustainability aim to achieve in geographical terms?
   A. Unlimited consumption of resources
   B. Preservation of resources for future generations
   C. Economic growth without environmental concerns
   D. Expansion of urban areas
5. Which of the following is an example of a natural environment?
   A. A city park
   B. A rainforest
   C. A shopping mall
   D. A residential neighborhood

ANALYSE AND APPLY

6. **Explain** what is meant by the concept of 'space' in geography. How does the arrangement of different spaces influence human activities?
7. **Discuss** the concept of 'change' in geography and provide examples of both natural and human-induced changes. Refer to a place that has changed over time.
8. What are the key components of the skill of geographical inquiry?
9. **Explain** why concluding and decision-making is a key skill in geography. Use an example to support your answer.

EVALUATE AND COMMUNICATE

10. **Identify** one advantage and one disadvantage of each method for collecting geographical information: field observations, remote sensing, and GIS.

Answers and sample responses for this topic are available online.

To help develop your Geographical skills further, see bonus SkillBuilders from lessons 12.3 to 12.20.

LESSON 12.3 SkillBuilder: Geographical inquiry

online only

What is a basic choropleth map?

A basic choropleth map is a shaded or coloured map that shows the density or concentration of a particular aspect of an area. The key/legend shows the value of each shading or colouring. The darkest colours show the highest concentration, and the lightest colours show the lowest concentration.

LESSON 12.4 SkillBuilder: Concluding and decision-making

online only

What is a population pyramid?

A population pyramid is a bar graph that provides information about the age and gender of a population. The bars identify the proportion of a country's population within a particular age group. The graph is split to show information about males and females. The shape of the population pyramid tells us about a particular population.

LESSON 12.5 SkillBuilder: Communicating

online only

What are compound bar graphs?

A compound bar graph is a bar or series of bars divided into sections to provide detail of a total figure. These bars can be drawn vertically or horizontally. The height or length of each section represents a percentage, with the total length of the bar representing 100 per cent.

LESSON 12.6 SkillBuilder: Reading contour lines on a map

online only

What are contour lines?

Contour lines drawn on a map join all places of the same elevation (height). These lines are usually brown and have a number written on them to indicate height above sea level. Contour maps are used to show the relief (shape) of the land and the heights of the landscape. Land heights are identified from aerial photography. Natural features, such as rivers, lakes and beaches, and human features, such as towns, roads and power lines, are added to the map to complete the landscape picture. Symbols provided in a legend (or key) or labels on the map add information to complete the image of the environment.

LESSON 12.7 SkillBuilder: Recognising land features

online only

What are land features?

Land features are landforms with distinct shapes, such as hills, valleys and mountains. You recognise these as you look around your natural environment. On topographic maps you recognise land features from the patterns formed by the contour lines.

LESSON 12.8 SkillBuilder: Using latitude and longitude

online only

What are latitude and longitude?

Latitude and longitude are imaginary grid lines encircling the Earth. They can be drawn over a map to help us locate a place.

LESSON 12.9 SkillBuilder: Calculating distance using scale

online only

What does it mean to calculate distance using scale?

Calculating distance using scale involves working out the actual distance from one place to another using a map. The scale on a map allows you to convert distance on a map or photograph to distance in the real world — what it represents on Earth's surface. A linear scale is the easiest to use, but sometimes the distance being measured between places is not straight.

LESSON 12.10 SkillBuilder: Drawing simple cross-sections

online only

What are cross-sections?

A cross-section is a side-on, or cut-away, view of the land as if it had been sliced through by a knife. It is like taking a vertical slice of the landscape and looking at it side-on. Cross-sections provide us with an idea of the shape of the land. We can use contour lines on topographic maps to draw a cross-section between any two points. Cross-sections also indicate heights at a range of points.

LESSON 12.11 SkillBuilder: Interpreting an aerial photo

online only

What are aerial photos?

Aerial photographs are those that are taken from above the Earth from an aircraft. Aerial photos, either oblique or vertical, record how a place looks at a particular moment in time. Greater detail of a place can be captured than in a photo taken from ground level. Some aerial photos are also satellite compilations; that is, created by a number of images transmitted from the satellite.

LESSON 12.12 SkillBuilder: Understanding thematic maps

online only

What is a thematic map?

A thematic map is a map drawn to show one aspect; that is, one theme. For example, a map may show the location of vegetation types, hazards or weather. Parts of the theme are given different colours or, if only one idea is conveyed, symbols may show location.

LESSON 12.13 SkillBuilder: Drawing a line graph using Excel

online only

What is a line graph?

A line graph is a clear method of displaying information so it can be easily understood. It is best used to show changes in data over time. In this SkillBuilder, you will develop your skills in constructing a line graph using Excel, which is a spreadsheet program. Using a digital means of drawing a line graph enables you to show multiple data sets clearly.

LESSON 12.14 SkillBuilder: Using positional language

online only

What is positional language?

Positional language uses compass points to locate places and provide directions between places. A magnetic compass will always point to north. All other directions are taken from this reference point. An 8-point compass — with points north, north-east, east, south-east, south, south-west, west, and north-west — is standard in most Geography books and atlases. A 16-point compass provides even further detail.

LESSON 12.15 SkillBuilder: Constructing a field sketch

online only

What are field sketches?

Field sketches are drawings completed during fieldwork — Geography outside the classroom. Field sketches allow a geographer to capture the main aspects of landscapes in order to edit the view, focusing on the important features and omitting the unnecessary information. Field sketches are free-hand drawings with annotations. Colour may be added but is not a requirement. A field sketch aids our sense of observation and allows us to record and interpret environments.

LESSON 12.16 SkillBuilder: Creating and describing complex overlay maps

online only

What is a complex overlay map?

A complex overlay map is created when one or more maps of the same area are laid over one another to show similarities and differences between the mapped information. All maps must be at the same scale. Laid over a base map with information that is consistent (for example, landforms), traced copies of maps showing variables (for example, population) allow you to see the elements underneath. Traditionally, the second map is on tracing paper that is attached to the original map.

LESSON 12.17 SkillBuilder: Drawing a précis map

online only

What is a précis map?

A précis map is a simplified map — the cartographer has decided which details to leave in and which to leave out. It is different from a sketch map, which includes all the main features.

LESSON 12.18 SkillBuilder: Creating and reading pictographs

online only

What is a pictograph?

A pictograph is a graph drawn using pictures to represent numbers, instead of the bars or dots that are traditionally used on graphs. Data can be drawn vertically or horizontally. Each picture is given a value.

LESSON 12.19 SkillBuilder: Describing photographs

online only

What is meant by 'describing a photograph'?

A description is a brief comment (up to a paragraph) on a photograph, identifying and communicating features from a geographic point of view. Sometimes it is necessary to infer information from a photograph; for example, a cloud of dust in an image may tell us that the climate is dry, or that the place is experiencing drought, or that some movement disturbed the soil at the time the photograph was taken.

LESSON 12.20 SkillBuilder: Constructing a basic sketch map

online only

What is a basic sketch map?

A basic sketch map is a map drawn from an aerial photograph or developed during fieldwork. It identifies the main features of an area and is different from a précis map, in which the cartographer opts to include or leave out certain features.

LESSON 12.21 Review

12.21.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

12.2 Concepts in Geography

- The acronym SPICESS helps you remember the seven geographical concepts:
- space
- place
- interconnection
- change
- environment
- sustainability
- scale.

12.3 Skills used in Geography

- Many occupations are linked to the study of Geography.
- New jobs are developing in the spatial sciences that use geographical tools such as GPS, GIS, satellite imaging and surveying.
- You will learn, practise and master a range of essential practical skills, including geographical inquiry, concluding and decision-making, and communicating.

12.2.2 Key terms

change the process by which places, environments or spatial patterns alter over time. In Geography, change can be natural (like erosion or climate change) or human-made (like urban development or deforestation).
environment the natural and human surroundings in which people, plants and animals live, including ecosystems, landscapes, and built environments.
interconnection the way people, places and environments are linked to each other through natural processes, trade, migration, culture and technology.
place a specific location on Earth that has unique physical and human characteristics, making it meaningful to people.
sustainability the responsible use and management of resources to meet current needs while ensuring future generations can also meet theirs.
space how features and places are arranged on Earth's surface; where things are located, how they are distributed, and the patterns they form
scale the ratio that shows how much smaller a map is compared to the real world, e.g. one centimetre on a map equals one kilometre in real life

12.2.3 Reflection

Complete the following to reflect on your learning.

Revisit the Inquiry question posed in the Overview.

Why is geography important to study, and what skills do I need to understand geography?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

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eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary
Video eLesson	Geography concepts and skills

12.21 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
3, 7, 11, 12	1, 2, 5, 6, 9, 13	4, 8, 10, 14, 15

REMEMBER AND UNDERSTAND

1. Identify what the acronym SPICESS stands for in Geography.
   A. Space, Place, Interconnection, Change, Environment, Sustainability, Scale
   B. Space, Population, Interaction, Climate, Ecosystem, Sustainability, System
   C. Soil, People, Integration, Change, Ecosystem, Species, Scale
   D. Space, People, Interaction, Climate, Environment, Sustainability, Scale
2. From the following, identify the word that is *not* part of the SPICESS framework in Geography.
   A. Space
   B. Population
   C. Place
   D. Sustainability
3. Geography primarily focuses on:
   A. exploring space.
   B. understanding the world's environments and human interactions.
   C. creating maps.
   D. studying historical events.
4. The geographical inquiry approach is best described as:
   A. memorising facts and figures.
   B. investigating geographical questions by gathering and analysing data.
   C. making creative representations.
   D. listening to oral histories.
5. From the following, identify the essential tool used by geographers to study the world.
   A. Books
   B. Maps
   C. Computers
   D. Photographs
6. Maps provide detailed information primarily about:
   A. species distribution.
   B. locations and spatial relationships between places.
   C. weather patterns.
   D. historical events.
7. When producing maps, geographers typically:
   A. draw by hand or use digital tools.
   B. paint abstract representations.
   C. sculpt terrain models.
   D. use photographs exclusively.

8. The primary reason geographers use maps is to:
   A. navigate from place to place.
   B. document cultural history.
   C. interpret spatial patterns and relationships.
   D. develop artistic representations.
9. To fully engage with geography, one must develop:
   A. practical analytical skills.
   B. advanced artistic abilities.
   C. physical fitness skills.
   D. drawing and painting techniques.
10. What is the main value of studying geography?
   A. To learn the capitals of the world
   B. To understand the physical world, its people and their interactions
   C. To improve artistic creativity
   D. To develop navigational skills

ANALYSE AND APPLY

11. **Explain** the importance of geography in understanding the world's environmental and societal dynamics.
12. **Explain** how the concept of 'space' in geography helps explain the distribution of people, resources and environments.
13. **Distinguish** between the concepts of 'environment' and 'sustainability' within a geographical context.

EVALUATE AND COMMUNICATE

14. **Assess** the role and effectiveness of technological advancements in geographical research and data collection.
15. **Discuss** how geographical skills can be applied to real-world scenarios, and how they assist in everyday decision-making.

Answers and sample responses for this topic are available online.

13 Landforms and landscapes – diversity, significance and management

LESSON SEQUENCE

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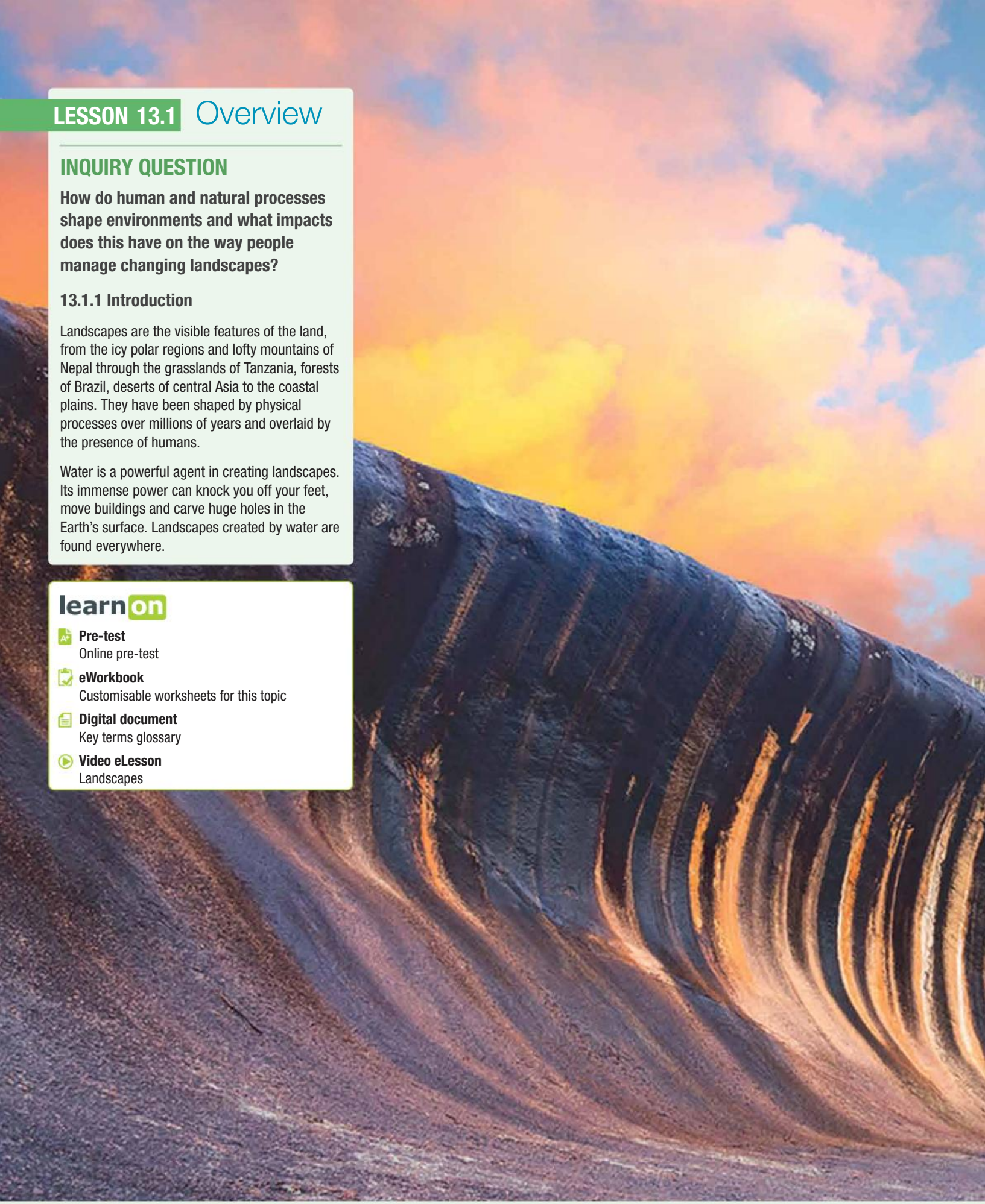

LESSON 13.1 Overview

INQUIRY QUESTION

How do human and natural processes shape environments and what impacts does this have on the way people manage changing landscapes?

13.1.1 Introduction

Landscapes are the visible features of the land, from the icy polar regions and lofty mountains of Nepal through the grasslands of Tanzania, forests of Brazil, deserts of central Asia to the coastal plains. They have been shaped by physical processes over millions of years and overlaid by the presence of humans.

Water is a powerful agent in creating landscapes. Its immense power can knock you off your feet, move buildings and carve huge holes in the Earth's surface. Landscapes created by water are found everywhere.

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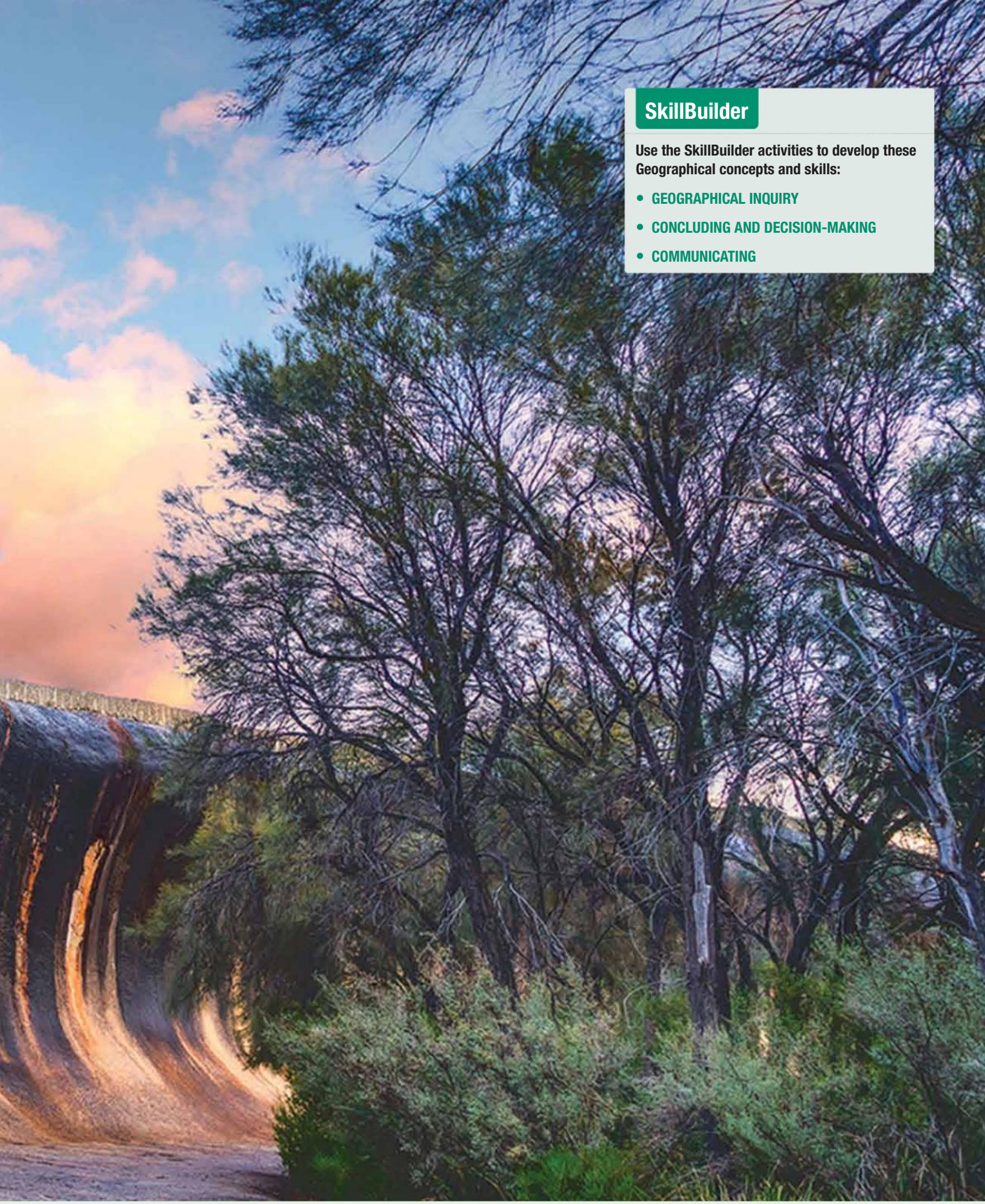
Pre-test
Online pre-test

eWorkbook
Customisable worksheets for this topic

Digital document
Key terms glossary

Video eLesson
Landscapes



SkillBuilder

Use the SkillBuilder activities to develop these Geographical concepts and skills:

- **GEOGRAPHICAL INQUIRY**
- **CONCLUDING AND DECISION-MAKING**
- **COMMUNICATING**

LESSON 13.2 Why do landscapes vary?

LEARNING INTENTION

By the end of this lesson you should be able to **identify** different types of landscapes.

Tune in

Did you know the Earth has many different types of landscapes and that there are variations within landscapes?

1. **Make a mind-map of different types of landscapes.**
2. **What factors do you think influence the formation of landscapes?**
3. **Select one of the landscapes you identified and suggest:**
   a. **how people could have a positive impact on this landscape**
   b. **how people could have a negative impact on this landscape.**

FIGURE 1 At 8848 metres, Mount Everest in the Himalayas is the highest mountain on Earth.

13.2.1 Types of landscapes

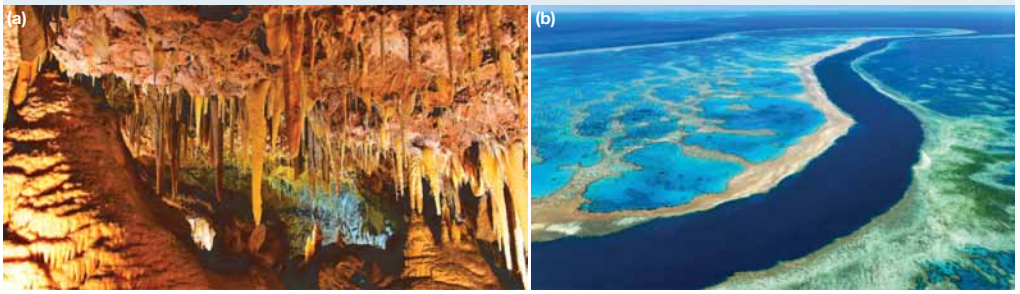
The Earth has a variety of landscapes with regional similarities. Differences are influenced by factors such as climate, geographical features (such as mountains and rivers), latitude, human impact and location.

SkillBuilder discussion

Communication

1. Describe the landscapes at (a) and (b).
2. These landscapes are both protected. Why do you think this is?
3. How do you think these landscapes were formed?

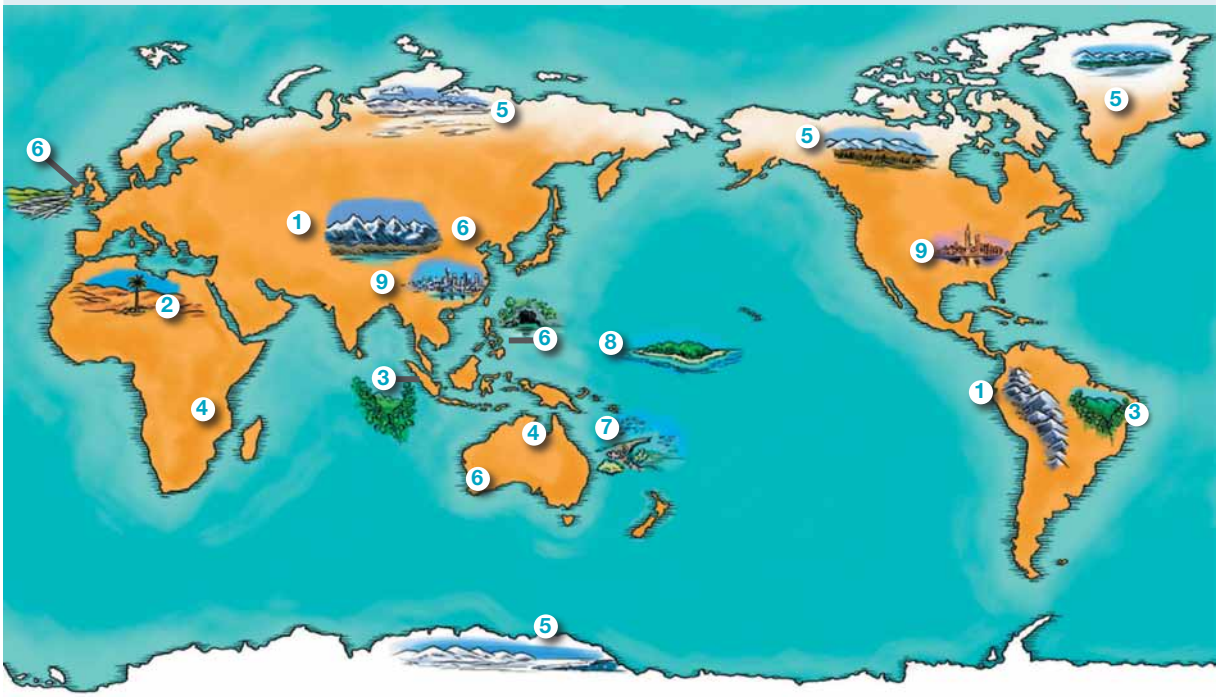
FIGURE 2 The Ngilgi cave formations in Western Australia are protected, due to their historical and cultural significance. **(a)** The Ngilgi cave formations in Western Australia **(b)** The Great Barrier Reef in Queensland.



Did you know?

The Great Barrier Reef can be seen from space. At 2300 kilometres in length, it is one of the largest and most visible natural features on Earth.

FIGURE 3 Selected world landscapes



1. Mountains rise above the surrounding land. They have steep sides and high peaks. They form from processes deep inside the Earth. Some mountains are so high that snow is found on their peaks.
2. Deserts are areas with low rainfall. They are dry environments. Deserts can experience temperature extremes: hot by day and cold by night. Not all deserts are hot. Antarctica is the world's largest desert. The Gobi Desert is a cold desert on a high plateau in Asia.
3. Rainforests are the most diverse landscapes on Earth. They are found in both tropical and temperate areas. The lush vegetation depends on high rainfall. Over 50 per cent of all known plant and animal species live in rainforests. Many foods and medicines come from rainforests.
4. Grasslands, or savannas, lie between forests and deserts. They contain grasses of different heights and small or widely spaced trees. Grasslands are often home to grazing animals.
5. Polar regions and tundra are found in polar and alpine areas. These regions have permafrost and are too cold for trees. Dwarf shrubs, grasses and lichens grow here. Glaciers carve landscape features as they move down mountains.
6. Karst landscapes form when mildly acidic water flows over soluble rock like limestone. Small fractures form and increase in size, leading to underground drainage systems. Common features include limestone pavements, disappearing rivers, reappearing springs, sinkholes, caves and karst mountains. Around 25 per cent of the world's population gets water from karst aquifers.
7. Aquatic landscapes cover around three-quarters of the Earth. They can be freshwater or marine. Marine landscapes include oceans and coral reefs. Freshwater landscapes include lakes, rivers and wetlands.
8. Islands are surrounded by water. They can be continental or oceanic. Continental islands lie on a continental shelf, an extension of a continent under the sea. Oceanic islands rise from the ocean floor and are often volcanic. A group of islands is called an archipelago.
9. Human or built landscapes are created or altered by humans.

13.2 SkillBuilder activity COMMUNICATING

Your objective is to create a short video showcasing one of the landscapes from **FIGURE 3**. Your target group is aged 20–25. Present your video idea as a script, with carefully selected images.

Choose a location with notable landscape features and include the following:

- location
- climate
- striking natural features
- unique or interesting animal and/or plant species
- specific cultural or historical human aspects.

Presentation tips: Use geographical languages when referring to your chosen place. Tailor your content to appeal to your target audience. Use persuasive language and information to entice travellers to your destination.

FIGURE 4 A peaceful and idyllic place to interact with nature

13.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 7	4, 5, 8	6, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** the difference between the terms *natural environment* and *built environment*.
   A. Natural environments are created or altered by humans, whereas built environments are not.
   B. Built environments are created or altered by humans, whereas natural environments are not.
2. **Determine** whether the following statement is True or False.
   Altitude, latitude, geographical features and climate are examples of factors that do not make landscapes different.
3. From the following, **identify** four human or built environments.
   a. Forests
   b. Zoos
   c. Camping grounds
   d. Caravan parks
   e. Grasslands
   f. Farms
4. **Explain** why people change landscapes.
5. **Select** two of the landscapes featured in this lesson and explain how they are different.

ANALYSE AND APPLY

6. Copy the following table into your workbook.

Characteristics	How it formed	How people use it	Positive impacts	Negative impacts	Human impacts, both positive and negative

   a. **Select** one of the landscape types described in this lesson and complete the table, stating the positive and negative aspects of human use.
   b. **Determine** which list is larger — the positive impacts or negative impacts.
   c. Review the column of negative impacts. **Select** three of these impacts and propose a way in which the environment could be used more sustainably.
7. **Describe** how the scale of the following landscapes might differ around the world: deserts, polar regions, aquatic landscapes and islands.
8. **Explain** which of the featured landscapes you would like to know more about. **Create** a list of questions that you would like to have answered.

EVALUATE AND COMMUNICATE

9. **Evaluate** the comment that rainforests are the most diverse landscape on Earth.
10. **Identify** the featured landscape that you think would be the least diverse. **Justify** your answer.

Answers and sample responses for this topic are available online.

LESSON 13.3 How are landscapes created?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **explain** the geomorphological processes that produce landforms
- **explain** how water changes landscapes.

Tune in

Processes are at work to continuously sculpt and change the landscape. In the future, the Earth's surface will look quite different from the way it looks today. **FIGURE 1** (a) and (b) show similar landforms at different locations.

FIGURE 1 **(a)** Arches at Santa Cruz, USA (a coastal environment) **(b)** Lake Powell, USA (an inland environment) **(c)** the Grand Canyon.

1. **Do you think these landforms were created by the same processes? Justify your response.**
2. **Describe how you think one of these landscapes looked one million years ago.**
3. **Explain how you think one of these landscapes might change over the next one million years.**

13.3.1 Are all processes natural?

Natural processes such as tectonic uplift, **erosion**, **deposition** and **weathering** continuously shape the Earth's surface and what lies below. People change landscapes when they clear the land for agriculture or to build cities and road networks.

13.3.2 The role of tectonic forces

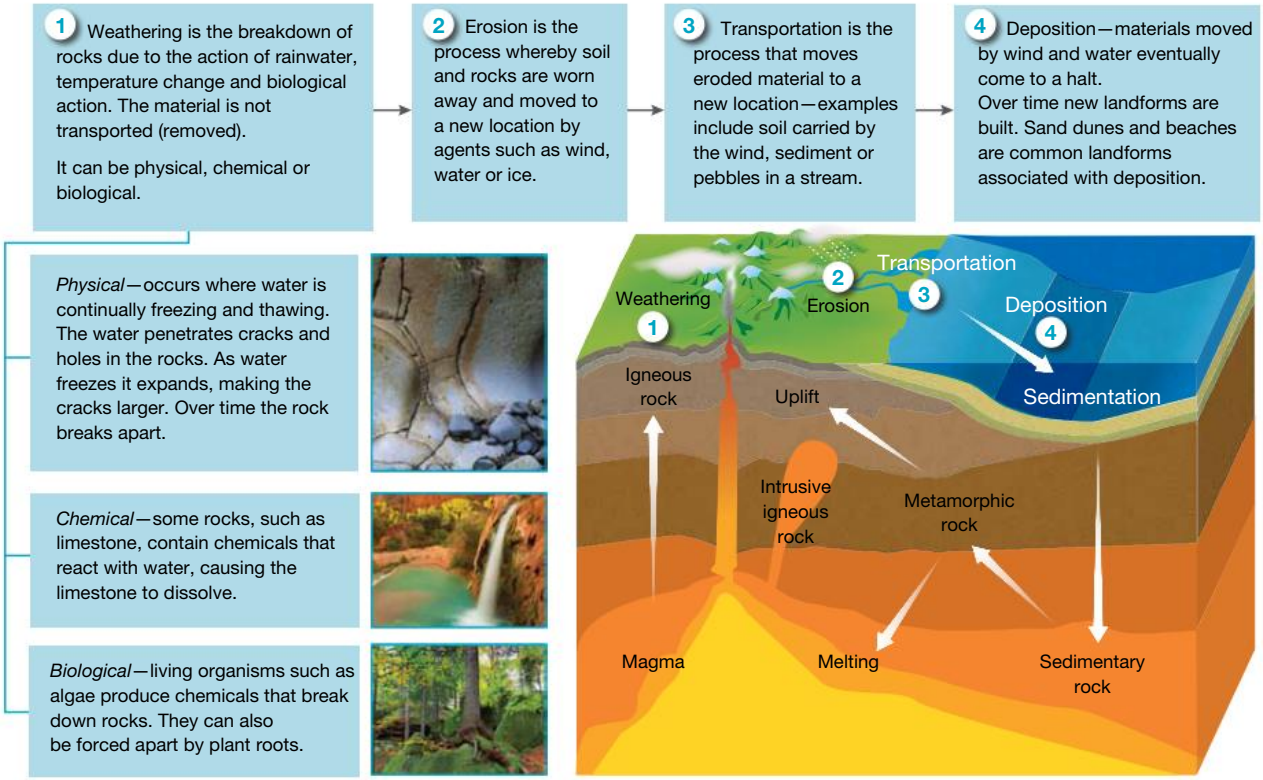
The Earth's crust consists of a series of plates that fit together like a jigsaw puzzle. These plates sit on a layer of semi-molten material in the Earth's **mantle**. Heat from the Earth's core creates **convection currents**, causing the plates to move.

When two plates collide, one will slide under the other in a process known as **subduction** and become part of the mantle. Other rocks will bend and buckle as they are forced upwards. Great mountain ranges such as the Himalayas in Asia and the Rocky Mountains in North America were formed this way. You will learn more about the formation of mountains in Topic 14.

13.3.3 Changing landscapes — how is the landscape worn away?

Erosion is the wearing away of the Earth's surface by wind, water, ice and human activity. Further erosion occurs as the eroded material is **transported** and deposited in a new location. Over time, this material can build up, creating new landforms. The Grand Canyon in Arizona **FIGURES 1b** and **3** are examples of these elements at work. Stunning landforms have been created as the river cut deep channels into softer rocks.

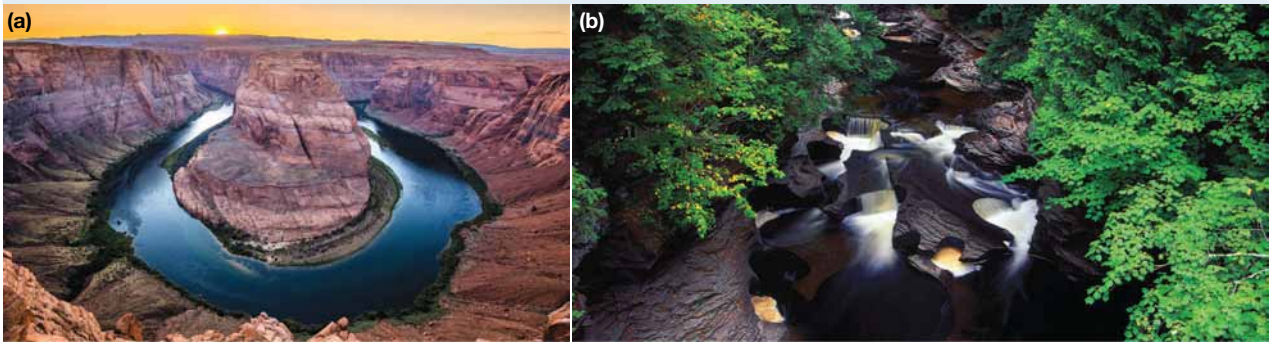
FIGURE 2 After tectonic forces cause a section of the Earth to be raised (uplifted), other processes take over and resculpt the landscape.



13.3.4 How does water shape landforms?

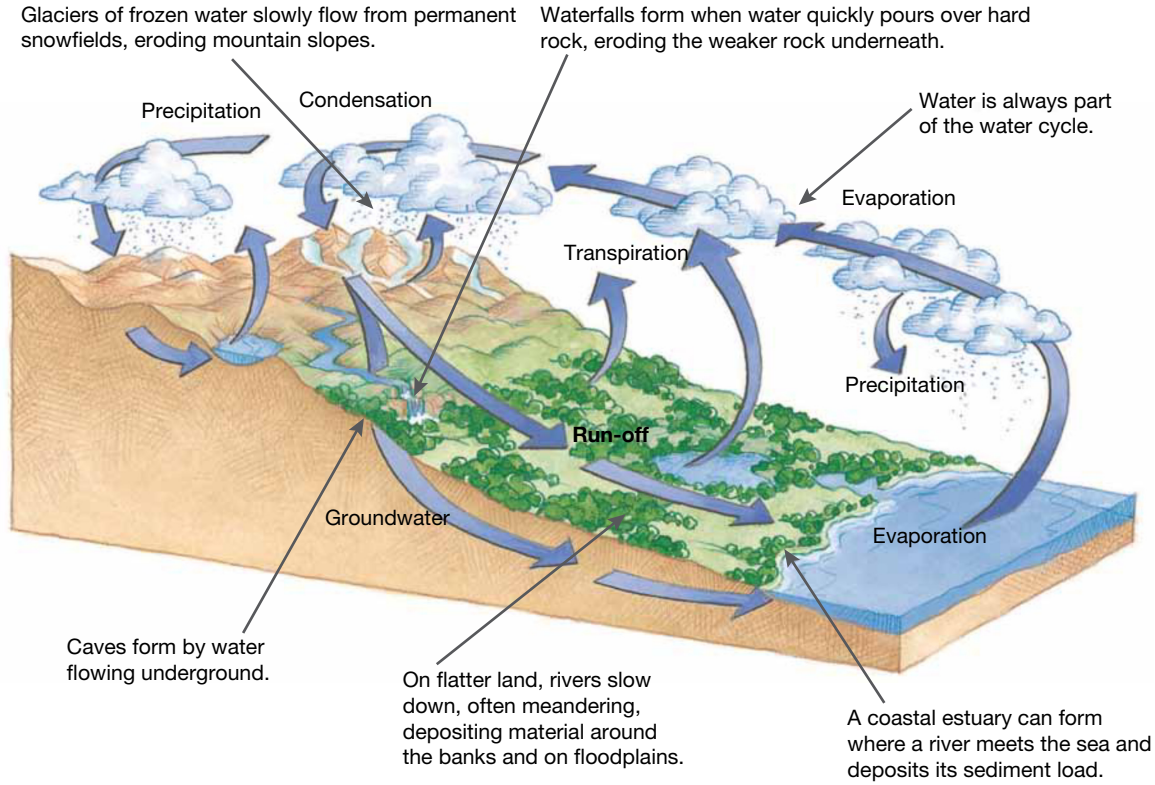
Water changes landscapes through erosion and deposition. Torrents of gushing water can shift rocks, strip away topsoil and carve river valleys. Gentle rain chemically alters surface material, sculpting impressive coastal landforms. In cold climates, glaciers work like slow-moving bulldozers, eroding the land and creating unique features.

FIGURE 3 Horseshoe Bend is a meander in the Colorado River, created over millions of years as the river flowed through the Grand Canyon, eroding softer rock, and transporting the material downstream. **(a)** The Colorado River meandering through the Grand Canyon and **(b)** water flow changing the landscape.



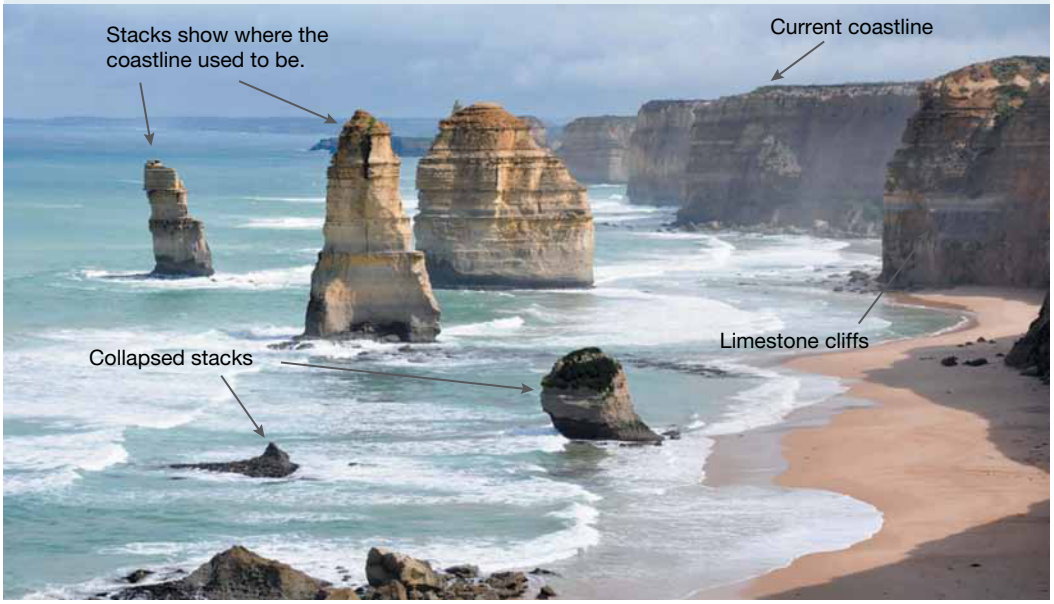
At the coast, the power of waves can carve through rock, reducing once mighty cliffs to lowly sea-stacks. Through deposition, water creates beaches, spits and sand dunes. You can see the power of water as it rushes over a rock face, creating rock pools (**FIGURE 2**) or carving coastal features (**FIGURE 4**).

FIGURE 4 Water constantly moves over and through the earth, and through the air.



The coastal features that we see today have evolved over hundreds or thousands of years. **FIGURE 5** shows the Twelve Apostles on Victoria's south-western coast. In the foreground you can see the remnants of collapsed stacks. These stacks were once part of the mainland — constant rainfall and wave action on soft limestone cliffs have created the landforms we see today.

FIGURE 5 The Twelve Apostles in Port Campbell National Park, Victoria



SkillBuilder discussion

Geographical inquiry

1. What geographical processes have shaped the Twelve Apostles?
2. Suggest how this landscape would have looked a million years ago.
3. Predict how this landform might look in the future.

13.3.5 What is soil?

Soil is formed through the processes of weathering and erosion and is the basis of all life on Earth. It provides the nutrients needed for agriculture and raising livestock.

Australian soils are poorer than those on other continents such as North America and Europe. In some areas they are low in nutrients and have a high salt content. Patches of good soil are found scattered across the continent.

For example:

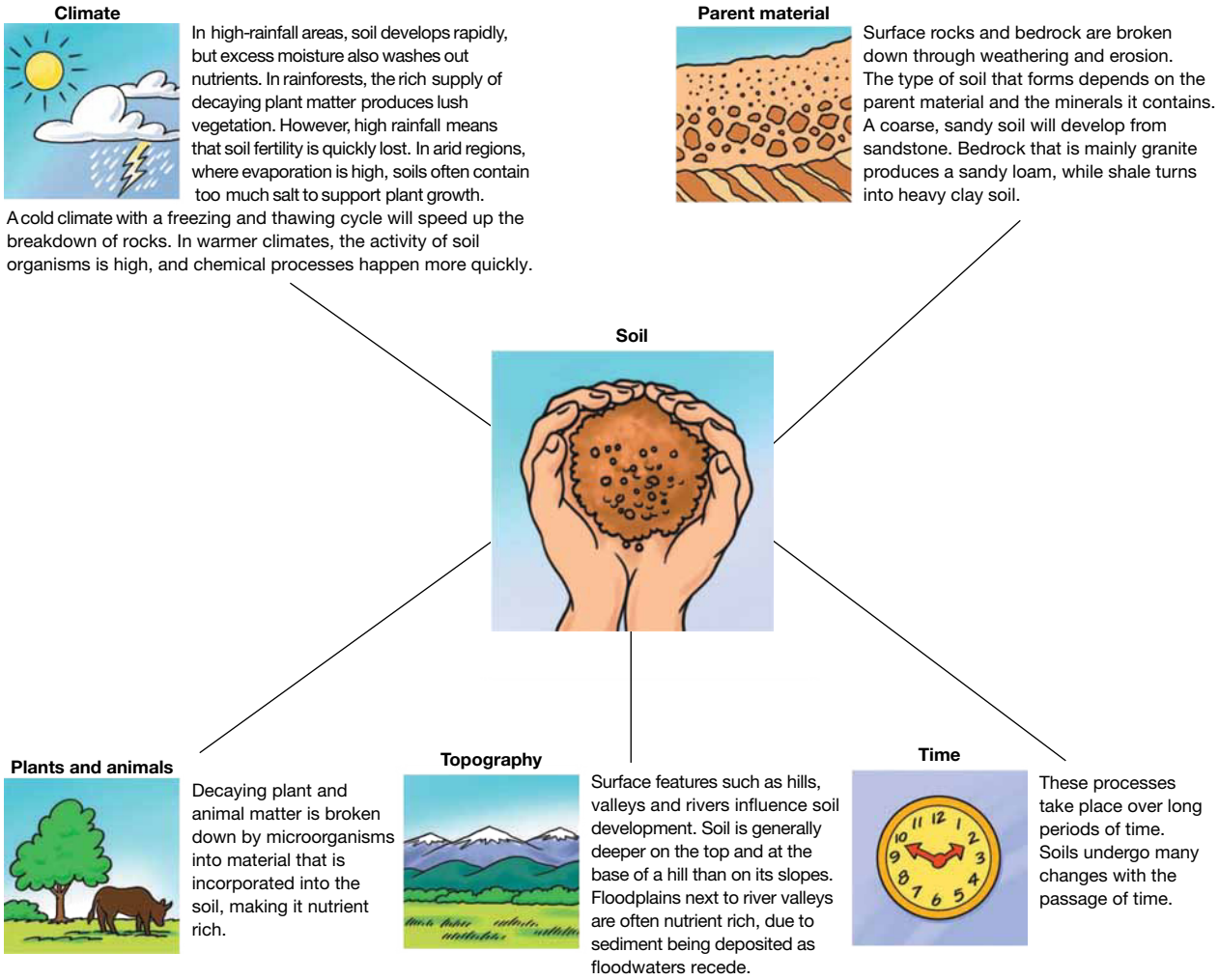
- Volcanic soil is found in Darling Downs in Queensland and Orange in New South Wales.
- Rich alluvial soil is located in river valleys around Margaret River in Western Australia and Goulburn River in Victoria.
- In highland regions of the Snowy Mountains and Central Australia's arid and semi-arid regions, it can take more than 1000 years for natural processes to produce 3 centimetres of soil.

SkillBuilder discussion

Geographical inquiry

1. Look closely at **FIGURE 6**. Mind-map why Australian soils are of poor quality.
2. What do you think is the most important influence on soil formation?
3. Where do you think the most fertile and least fertile soils are located in Australia?

FIGURE 6 Influences on soil formation



13.3.6 How does human activity change landscapes?

Human activity, such as deforestation, agriculture, urban sprawl, logging and road construction alters the natural balance and may increase erosion by up to 40 per cent in some areas. Vegetation not only provides habitats for native animals but is vital for binding the soil. Once vegetation is removed, the soil is more prone to erosion by wind and water (**FIGURE 7**). Loss of topsoil means there are fewer nutrients for plant growth, and gullies may form.

SkillBuilder discussion

Geographical inquiry

1. What is a gully?
2. Why do you think this gully has formed?
3. Do you think the people in the image would be concerned about the size of this gully? Give a reason for your answer.

FIGURE 7 Note the scale of this gully compared to the people.

13.3 SkillBuilder activity GEOGRAPHICAL INQUIRY AND COMMUNICATING

Your task is to create a presentation to:

- **explain** how physical processes have shaped and changed the landscape over time
- **describe** the traditional Dreaming creation story associated with your landscape and explain its significance to Aboriginal and Torres Strait Islander Peoples of Australia.
  1. Use the internet to find a well-known landform in Australia (other than those shown in this spread).
  2. Annotate your image to describe how your landform has changed over time and the processes that have resulted in these changes.
  3. Predict how your landform might look in the future.
  4. Add additional annotations or diagrams to illustrate the Dreaming creation story of Aboriginal and Torres Strait Islander Peoples.
  5. Explain the significance of your chosen landscape or landform feature to Aboriginal and Torres Strait Islander Peoples of Australia.
  6. Find an example of your feature in a different part of the world. Explain how it is similar and different to your Australian example.

13.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4, 5	3, 6, 9, 10	7, 8

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statements are True or False.
   a. Soil is the thin layer of material on the surface of the Earth in which plants can grow.
   b. Australia generally has superior soils when compared with those found on other continents such as North America and Europe.
   c. When one tectonic plate slips under another, it is known as subduction.
   d. The breakdown of rocks (weathering) is only a physical process.
   e. Soil is generally shallower on the top and at the base of a hill than on its slopes.
   f. Erosion processes work more quickly on softer rocks.
2. **Consider** the natural processes at work shaping the Earth and complete the following passage using the words below.

erosion	corrosion	deposition	transportation	weathering	deportation

   a. _____ refers to the process of eroded or weathered material being moved to new locations by agents such as wind, water and ice. _____ on the other hand refers to materials being dropped in new locations and may result in new landforms being created.
   b. _____ is the process whereby soil and rocks are worn away and moved to a new location by agents such as wind, water or ice. Whereas _____ refers to the breakdown of rocks due to the action of rainwater, temperature change and biological action.
3. **Determine** whether the following statement is True or False.
   Deposition is a more powerful process than erosion.
4. **Explain** how the water cycle and the formation of landscapes are interconnected.
5. a. **Identify** the two natural processes powered by water that are most responsible for continually changing landscapes.
   a. Erosion
   b. Transportation
   c. Deposition
   d. Transpiration
   b. **Identify** how these two processes are linked.

6. **Identify** the material that the Twelve Apostles and Ko Ta Pu rock are made from.
   a. Granite
   b. Sandstone
   c. Limestone
   d. Marble

ANALYSE AND APPLY

7. **Explain** how and why human activity might contribute to weathering and erosion.
8. Using terms such as *uplift*, *erosion*, *deposition*, *weathering* and *transportation*, **explain** the interconnection between physical processes and the environment.

EVALUATE AND COMMUNICATE

9. **Predict** how Horseshoe bend (**FIGURE 3**) might change over time.
10. **Suggest** how the landforms will change as a river carves its way from its source to the sea.

Answers and sample responses for this topic are available online.

LESSON 13.4 Coastal landscapes: the role of erosion and deposition

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the impacts of erosion, transportation and deposition of water on a coastal landscape.

Tune in

1. **What geological process do you think has caused this sand to be black?**
2. **How might wave action change this beach?**

FIGURE 1 The black sands of Reynisfjara, Iceland

13.4.1 How do waves change the environment?

The coast is the zone or border between land and ocean. It is the collision zone where the movement of sea water and the impact of the ocean create coastal landscapes.

Coastal erosion is mostly caused by wave action. Waves are caused when wind blows over the ocean. The size of the wave depends on wind strength and the distance it travels (referred to as the ***fetch***).

A strong wind and long fetch create powerful **destructive waves**, which can strip beaches and erode the landscape. A gentle wind with a small fetch will create less powerful **constructive waves**, which may deposit sand on the coast and create depositional landforms.

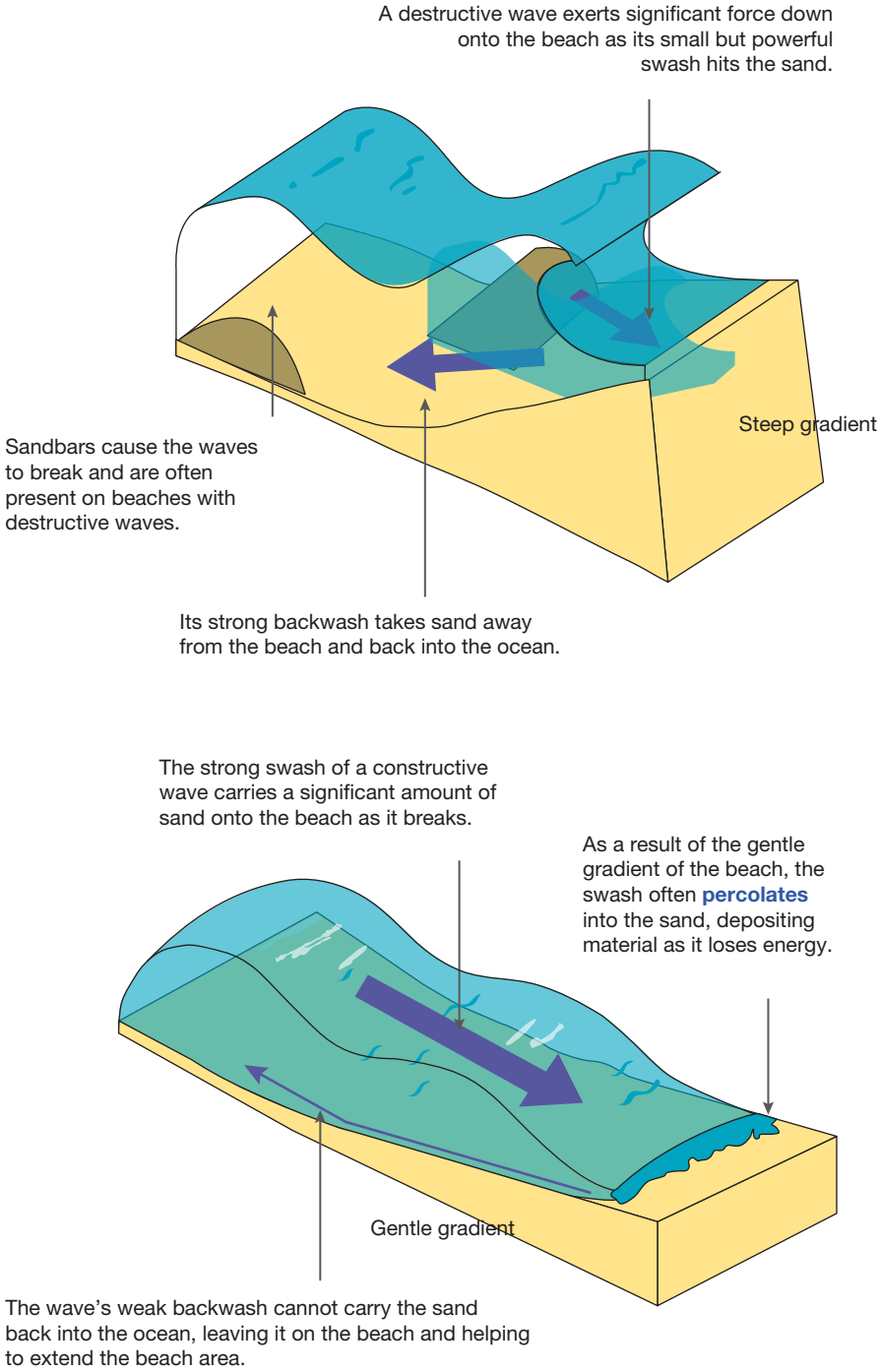
If the **swash** is more powerful than the **backwash**, the waves are constructive, and depositional landforms will be present. On the other hand, if the backwash is more powerful than the swash, the waves will be destructive, and erosion will be evident (**FIGURE 2**).

SkillBuilder discussion

Geographical inquiry

1. Look at **FIGURE 2**. Explain the difference between constructive and destructive waves.
2. Why are sandbars associated with beaches that have destructive waves?
3. Will a sandy beach be created by constructive or destructive waves? Justify your answer.

FIGURE 2 Comparing constructive and destructive waves

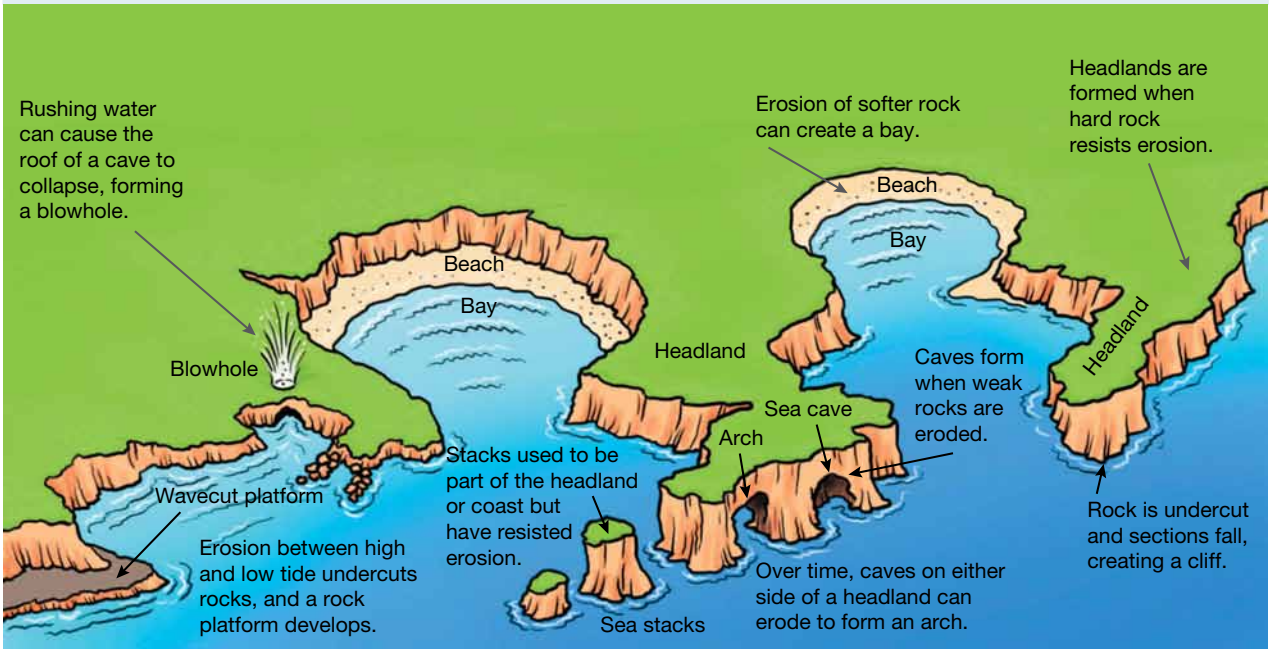


Coastal landforms are shaped by more than just wave action. Rainfall, winds and physical processes like evaporation, which leaves behind salts that interact with rocks, contribute to changes, potentially forming crevasses. Other factors include natural events like earthquakes and volcanoes, fluctuating sea levels, and human activities such as construction projects.

13.4.2 Which coastal landscape features are created by erosion?

Coastal features like cliffs, headlands and caves form as rainfall and wave action erode weak cliff spots, creating notches that develop into caves. Continued erosion causes cliffs to collapse, while water forms deep channels. Destructive waves reshape sandy coastlines by removing sand, destroying dune vegetation and damaging protective structures.

FIGURE 3 Coastal landforms created by erosion



SkillBuilder discussion

Concluding and decision-making

1. Why would people choose to build their home in this location?
2. What do you think will happen to these homes over time?
3. Do you think people should be allowed to build homes on a cliff face? Give reasons for your answer.

FIGURE 4 Destructive waves erode the coastline.

13.4.3 What is the role of deposition in coastal environments?

Constructive waves lack the force of destructive waves, but still play a vital role in shaping and forming coastal landforms. They deposit materials like sand, shells, coral and pebbles on the shore. Over time, these materials form beaches, spits, dunes, lagoons and other features (see **FIGURE 5**).

Additionally, material from eroding cliffs and river silt might also be transported to the coast. Dried by the sun, sand is blown inland to create dunes.

FIGURE 5 Depositional landforms: coastal landforms created by deposition

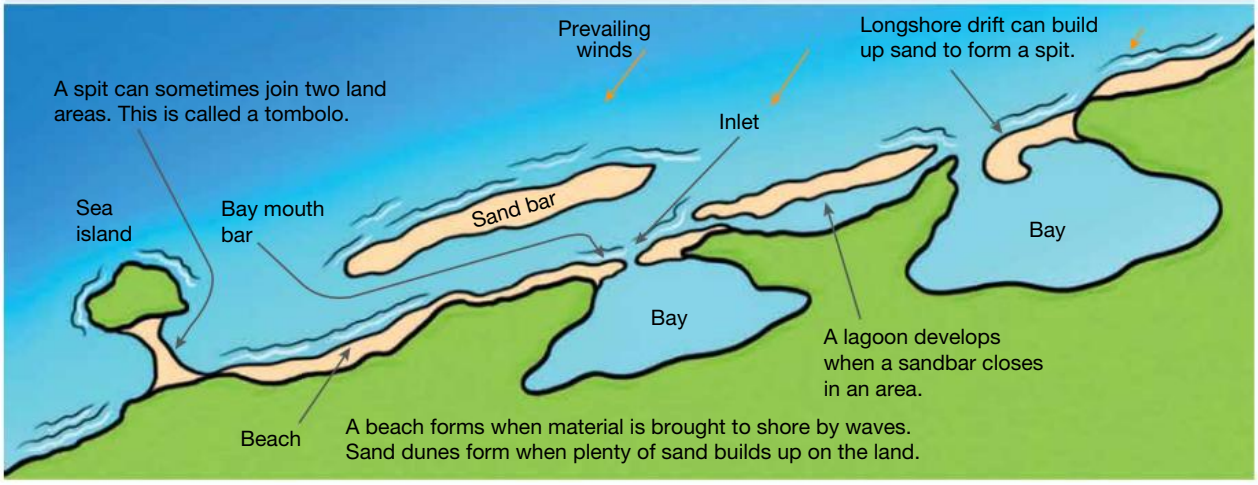
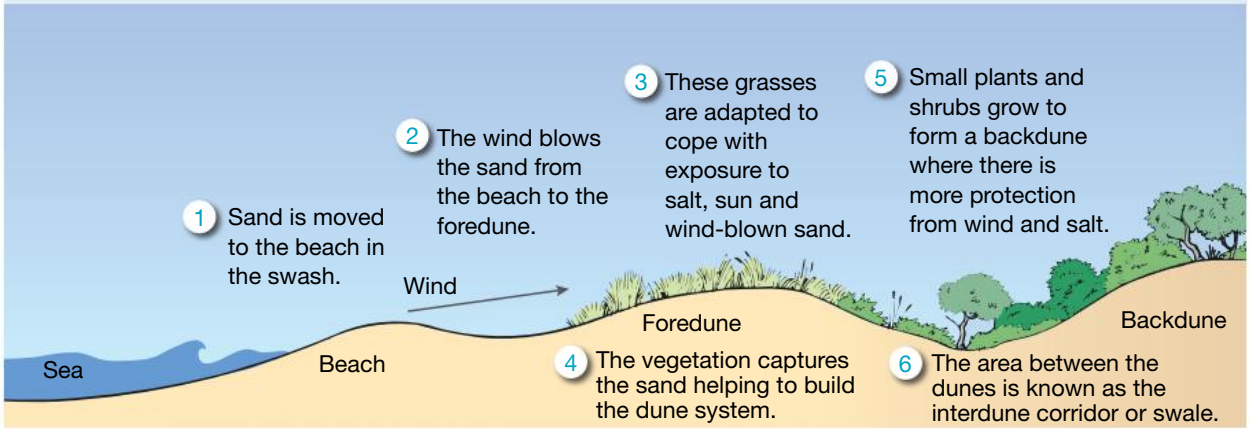


FIGURE 6 The formation of sand dunes



Beach material is shifted by wind and waves. The wind influences the angle at which the waves move towards the coast. Waves come from the direction of the **prevailing winds**. Waves approach the shore at an angle and their swash pushes material onto the beach at an angle. The backwash returns to the sea in a straight line, creating a zigzag pattern of movement.

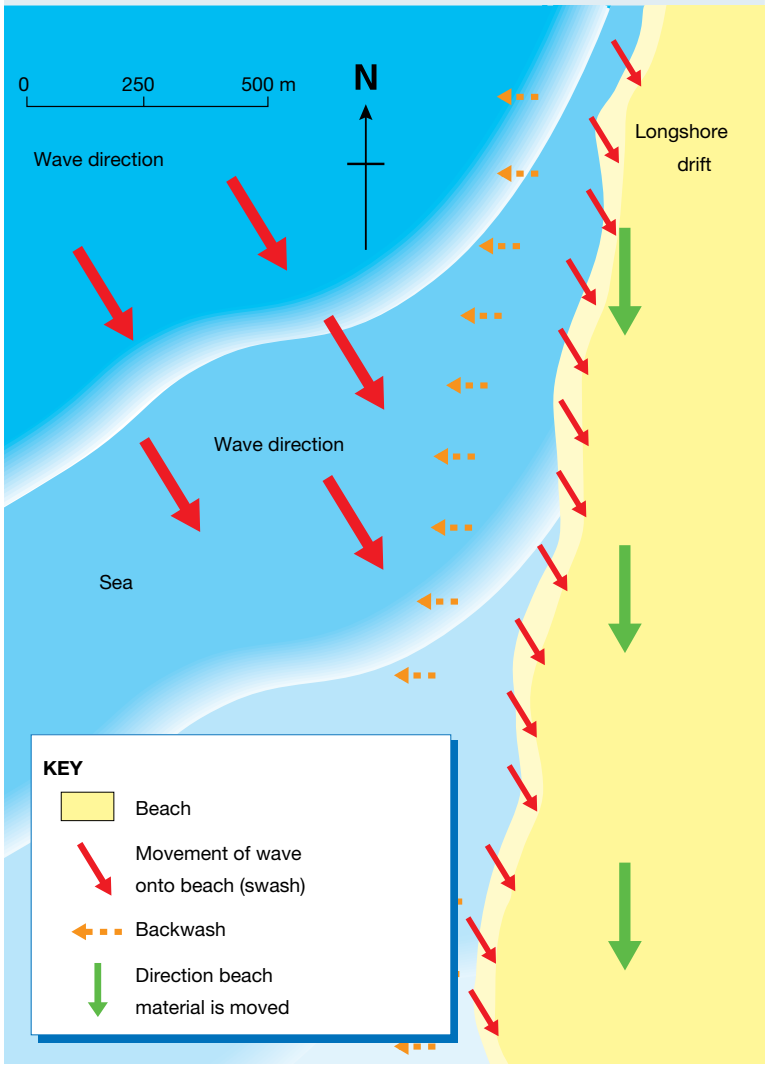
This process of material moving along the beach is known as **longshore drift**, and it creates features such as spits and sandbars. If the prevailing wind changes direction, so does the direction of longshore drift.

SkillBuilder discussion

Geographical inquiry

1. Use the compass shown in **FIGURE 7** to answer the following questions.
   a. Identify the direction of the swash.
   b. Identify the direction of the backwash.
   c. Identify the direction of longshore drift.
2. If this pattern continues, predict what feature might develop at the southern end of the beach. Give a reason for your answer.
3. Is this an example of constructive or destructive wave action? Explain.

FIGURE 7 The process of longshore drift



CASE STUDY
Cape Peron

Cape Peron in Western Australia's Shoal Islands Marine Park is a prime example of a **tombolo** — a landform created when a sand spit joins one island to another or the mainland.

At the end of the last ice age, some 10 000 years ago, Cape Peron was part of a limestone ridge which created high points along the coast. Rising sea levels created a chain of islands and wave action moved sand between the islands, forming a **cuspate spit**. Over the last 2000 years, this process has created a tombolo, connecting Cape Peron to the mainland. Today, the same process is joining Penguin Island to the coast by a sandbar. A tombolo typically forms in areas with constructive waves that are sheltered from prevailing winds, resulting in sandy beaches such as those along the eastern shore of Cape Peron.

Erosion is evident in other parts of the marine park. Cape Peron's western shore includes erosional landforms such as cliffs, arches and collapsed bridges. These locations are exposed to prevailing winds and destructive waves. Reefs and offshore stacks are also present in the west (**FIGURE 8**).

FIGURE 8 Coastal landforms at Cape Peron

13.4 SkillBuilder activity COMMUNICATING

This lesson requires you to create several examples of annotated diagrams, such as **FIGURES 2** and **5**.

Create your own annotated diagram showing at least six erosional or depositional landforms, or a combination of both landform types.

Depositional landforms		Erosional landforms	
• a spit • a beach • sand dunes • a bay • sandbar or ridge	• a delta • an estuary • a tombolo • a lagoon	• a cave • a cliff • an arch • a stack • a blowhole	• a rock platform (wave-cut platform) • a headland (point, cape or promontory)

Annotations should include details of how each was formed.

Find two examples of each landform from various parts of the world and add them to your diagram. Include the location of each feature in your annotations.

13.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 4, 5	3, 6, 7, 9, 10	2, 8

REMEMBER AND UNDERSTAND

1. **Select** the correct term: A **beach / coast / river / cliff** is the zone or border between land and ocean.
2. **Place** the following landforms in the order in which they would be created:
   a. arch, cave, headland, stack
   b. blowhole, cave, cliff
3. **Explain** the difference between constructive and destructive waves.

4. **Determine** where beach building material comes from. Select all answers from the options provided.
   a. Rivers
   b. Lakes
   c. Eroding cliffs
   d. Offshore
   e. Wind
5. **Select** the correct terms in the following sentences: Longshore drift moves material along the beach in a **circular / zigzag** pattern that follows the direction of the prevailing wind.
   Longshore drift moves sand along the beach and creates spits and **bars / bays / inlets**. If the prevailing wind changes direction, then so does the direction of longshore drift.
6. The formation of sand dunes cannot occur unless there is plenty of sand in the swash to allow the dunes to grow. **State** whether you agree or disagree. Use the information in **FIGURE 6** to **provide** the evidence for your response.

ANALYSE AND APPLY

7. If it were a windy day, **identify** where on the beach or dune would be the best place to take shelter. **Explain** your answer.
8. **Suggest** what might be some of the impacts on Cape Peron if a marina was constructed in the areas marked 'sandy beaches' in **FIGURE 8**.

EVALUATE AND COMMUNICATE

9. **Identify** the construction materials that might be deposited on a beach and the potential sources of this material.
10. **Describe** how coastal landforms are the result of the interconnection between the sea and the atmosphere.

Answers and sample responses for this topic are available online.

LESSON 13.5 How do rivers shape landscapes?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** the different phases of a river
- **describe** the landform features that form from a river's source to its mouth.

Tune in

Major cities are built near rivers, such as the Yarra River in Melbourne.

Using the evidence provided in **FIGURE 1**, create a mind-map of the ways the people in Melbourne might use the Yarra River. Consider different groups within the population. Share your list with the class.

FIGURE 1 The Yarra River winding towards Melbourne.

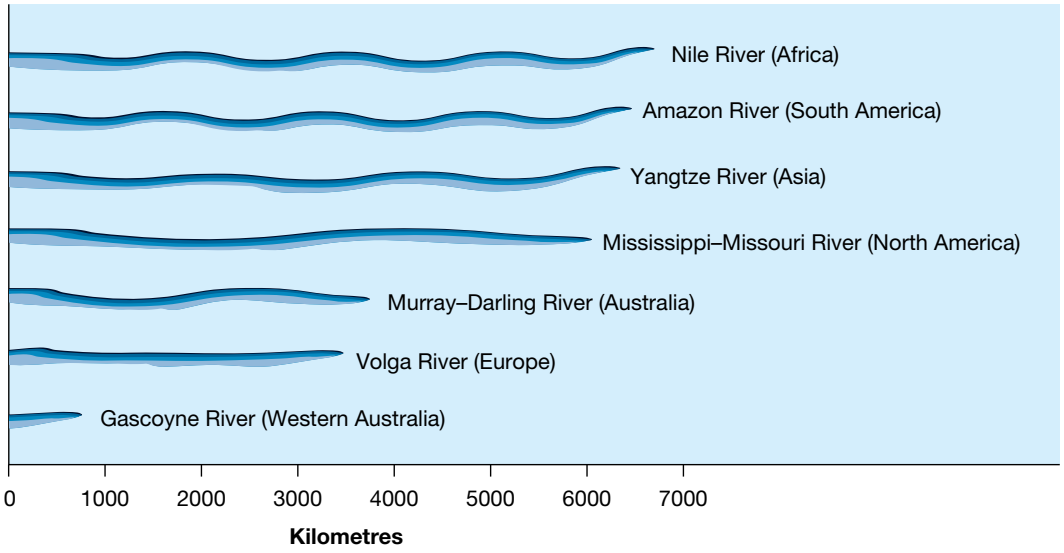
13.5.1 Moving water

Erosion, transportation and deposition are the key processes rivers use to sculpt landscapes. **Perennial** rivers, such as the Gordon River in Tasmania, flow all year. Others, such as Cooper Creek in Queensland, are **intermittent** and have seasonal flows.

Water is constantly moving through the water cycle; it evaporates from the surface and returns in the form of rain. It flows across the surface of the Earth into streams, eventually flowing into water bodies or soaking through rocks and soil into **groundwater**.

Groundwater is essential for keeping rivers flowing in dry months and preventing them from running dry.

FIGURE 2 Rivers of the world: the longest river on each continent



SkillBuilder discussion

Geographical inquiry

1. Look at **FIGURE 2**. How does each of these rivers compare to the Yarra River that runs through Melbourne?
2. What is your 'local' or closest river? Where does it start and end? How long is it?

13.5.2 River systems and features

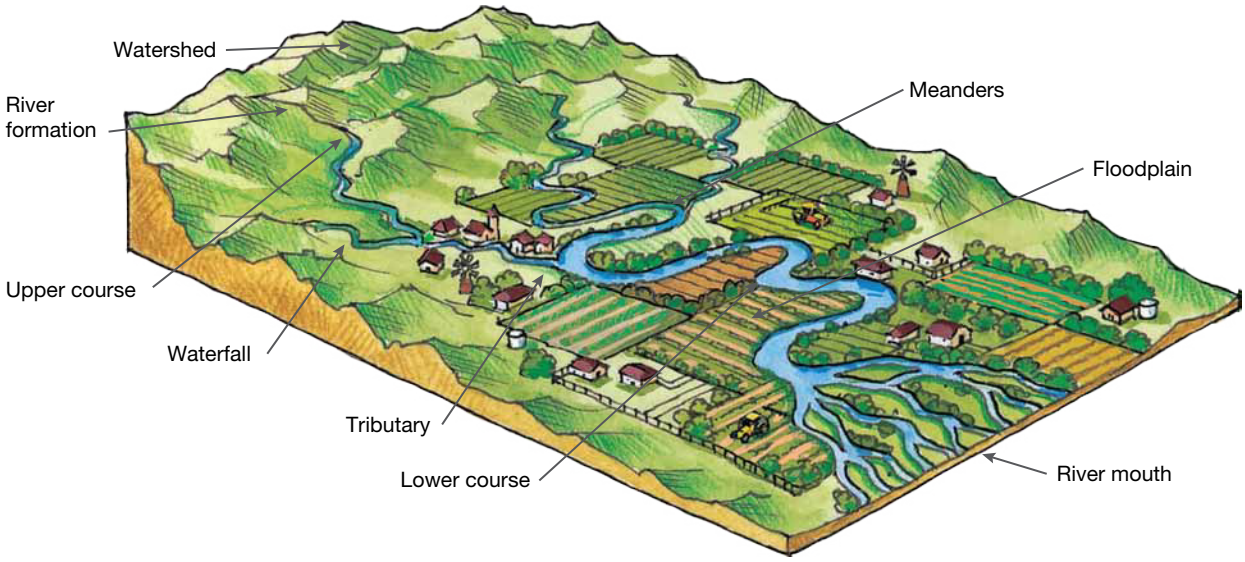
All parts of the Earth are related to the formation of river landscapes:

- The lithosphere (rocks and soil)
- The hydrosphere (water)
- The biosphere (plants and animals)
- The atmosphere (temperature and the water cycle)

Changes to a river can happen quickly or gradually. Any change can impact other locations along its course.

Rivers flow downhill; the source (start) will be at a higher altitude than its mouth (end). A fast-flowing flooded river will erode and transport large amounts of material **downstream**. As water speed or volume decreases, much of this material will be deposited. Rivers have three main sections — the upper, middle and lower course. Different processes and landforms are associated with each section (**FIGURE 3**).

FIGURE 3 A river system



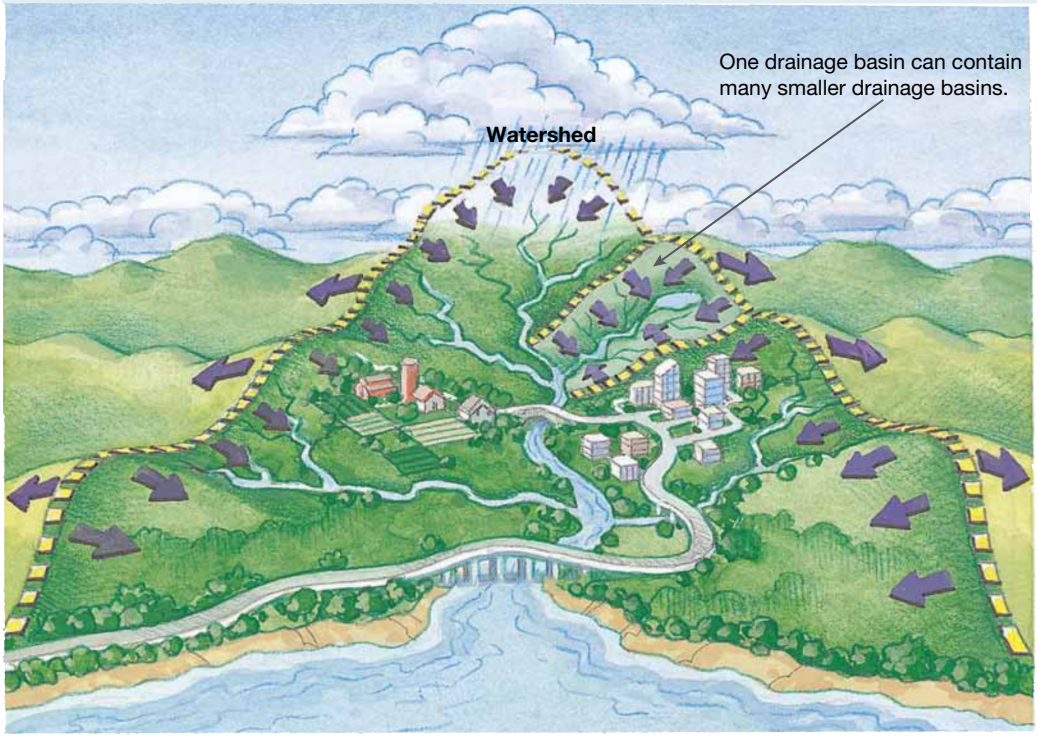
SkillBuilder discussion

1. Why do you think waterfalls develop close to the source of a river?
2. Why do you think meanders have developed in the middle section of the river?
3. Why does the river split into several smaller channels as it reaches the sea?

Upper course

A river's water comes from within its drainage basin or catchment (see **FIGURE 4**). Its boundary is identified by higher land such as mountains and hills. This boundary is referred to as the watershed, and it determines the direction of river flow.

FIGURE 4 The watershed and catchment (drainage basin) of a river system



Within a drainage basin, water collects in small depressions (rills) and these join to form larger streams. Eventually, these streams (tributaries) combine to form the main river.

Water flows swiftly in the upper course, moving from higher to lower elevations. The faster a river flows, the more erosive power it has.

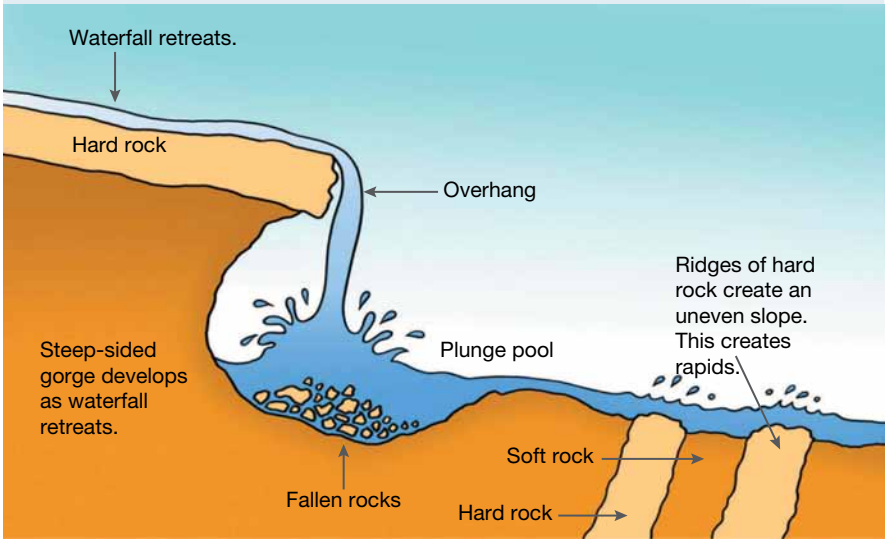
Common features in the upper course include waterfalls, plunge pools and rapids.

SkillBuilder discussion

Communication

1. What are a waterfall and a plunge pool?
2. Why do you think they develop in the upper course of a river?
3. Would it be safe to swim in this area? Discuss.

FIGURE 5 A waterfall



Middle course

Rivers follow the topography of the surrounding area. As the land flattens, the river forms long sweeping turns called **meanders**. The river's energy slows as it carves a new path through the landscape. Over time, a meandering river will change its path, creating new bends and cutting off others. This can form an **oxbow lake**, referred to as a **billabong** in Australia.

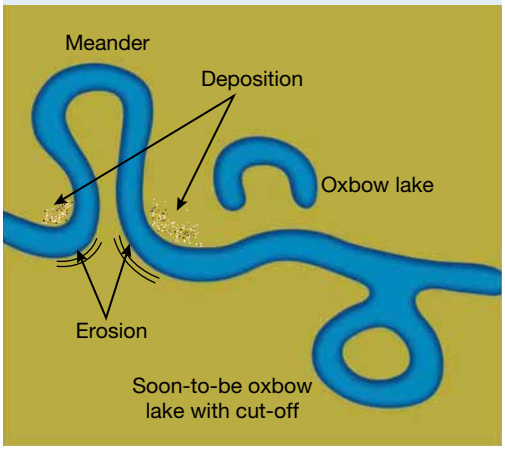
During times of high rainfall, the river may overflow its banks, flooding the adjacent land. This is referred to as a **floodplain**. As the floodwaters subside, they leave behind nutrient-rich sediment (alluvium) transported from the upper course, enriching the soil, which is often used for agriculture.

SkillBuilder discussion

Communication

1. Why do you think a river slows in the middle course?
2. Why do you think the river changes its course and creates oxbow lakes?
3. Suggest a reason the middle course of a river is ideal for agriculture.

FIGURE 6 The formation of a meander and oxbow lake



Lower course

As a river enters the lower course, it slows down, splitting into smaller streams called distributaries. Any remaining sediment it is carrying is deposited in an area referred to as the delta. **River deltas** are commonly fan shaped, arrow shaped and bird-foot shaped. A delta's shape is influenced by tides, waves and the volume of sediment and water carried by the river. Some rivers end with a wide mouth where fresh water mixes with salt water. This is known as an **estuary**.

Did you know?

Australia has no major river deltas because of the strong ocean currents surrounding the continent.

13.5 SkillBuilder activity GEOGRAPHICAL INQUIRY

A river finishes its long journey at the delta. Here, the river deposits the material it has carried, creating landscapes with nutrient-rich soils. Agricultural activity is common in these regions due to the high quality of the soil. However, life in the delta is not without its hazards, as floods occur frequently in these regions.

1. Research river deltas around the world, paying closer attention to the positive and negative aspects of living in a delta region.
2. When you have completed your research, create a table which identifies and explains the costs (negative) and benefits (positive) of living in a delta.

FIGURE 7 Salvaging crops after a flood in Bangladesh

13.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 3, 4	1, 5, 6, 7	8, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** the correct statement.
   a. The Nile River is 1.8 times longer that the Murray–Darling River.
   b. The Murray–Darling River is 1.8 times longer than the Nile River.
   c. The Nile River is 2.3 times longer that the Murray–Darling River.
   d. The Murray–Darling River is 2.3 times longer than the Nile River.
2. Study **FIGURE 5**. **Identify** the feature, other than water, that has to be present for waterfalls and rapids to develop.
   a. Winds
   b. Soft rocks
   c. Bands of hard rock
   d. Heavy rainfall

3. **Explain** why people settle and farm on floodplains. **Select** all answers.
   a. The land is flat.
   b. The land is steep.
   c. Regular flooding improves soil fertility.
   d. It is easy to sandbag during times of high river flow.
   e. A river is a source of water.
4. **Explain** how rivers are part of the water cycle.
5. Refer to **FIGURE 2** and **compare** the scale of Australia's longest river with the world's longest river.

ANALYSE AND APPLY

6. **Identify** a river that flows through the capital city in one state or territory in Australia. **Describe** its source, any tributaries and its mouth.

EVALUATE AND COMMUNICATE

7. **Propose** what you think will happen to deltas if sea levels rise.
8. **Predict** the changes that will occur to the waterfall in **FIGURE 5**. **Justify** your answer.
9. **Discuss** what changes will occur along a river if there is unusually high rainfall in its upper course. Think in terms of erosion and deposition.
10. **Explain** whether governments should stop people from living on floodplains. **Justify** your response.

Answers and sample responses for this topic are available online.

LESSON 13.6 Australian landforms

LEARNING INTENTION

By the end of this lesson you should be able to **identify** the distinctive landform features and their distribution in Australia.

Tune in

Many of Queensland's mountain peaks were formed by volcanic activity around 20 million years ago. The Glass House Mountains, north of Brisbane, are volcanic plugs. Over millions of years, the volcano that surrounded the plugs has been worn away by weathering and erosion.

1. **What do you think led to the formation of the volcanic plugs?**
2. **Distinguish between weathering and erosion.**
3. **Why do you think weathering and erosion wore away the volcano but not the plugs?**

FIGURE 1 The Glass House Mountains, Queensland

Did you know?

Australia once had volcanoes and is an ancient landmass, dating back about 4300 million years. The Earth itself is about 4600 million years old.

13.6.1 What processes have shaped Australia?

Australia's landforms are shaped by tectonic processes such as folding, faulting and volcanic activity, along with weathering, erosion and deposition. Over millions of years, the Earth's crust has buckled, folded and uplifted due to these processes, forming mountains, hills, valleys and coastal headlands.

FIGURE 2 Relief map of Australia. The Great Dividing Range stretches from north of Cairns in Queensland to Mount Dandenong near Melbourne in the south.

Source: ©WorldSat International, 2017

Situated in the centre of a tectonic plate, Australia lacks active volcanoes and experiences little tectonic lift, resulting in more worn-down mountains compared to other continents. About 33 million years ago, Australia moved northward after separating from Antarctica and encountered a hotspot, leading to eruptions that formed the Great Dividing Range. The oldest volcano erupted 35 million years ago at Cape Hillsborough, and the most recent around 6 million years ago at Macedon.

Rivers and streams have further eroded the land, carving valleys in Australia's higher regions. Slowing streams, glaciers and winds have dropped the materials they carried (deposition), leading to the formation of broad coastal and low-lying inland valleys called flood plains.

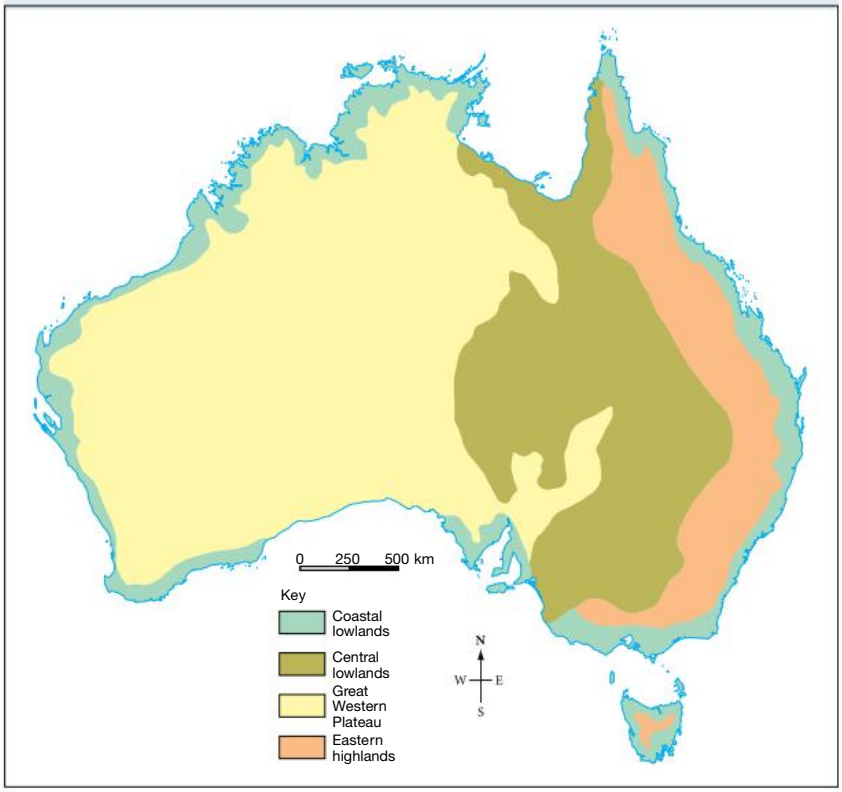
13.6.2 Australia's landform regions

SkillBuilder discussion

Communication

1. Describe what is meant by the term *landform region*.
2. What factors do you think are used to categorise landform regions?
3. Describe the area covered by each landform region.

FIGURE 3 Australia's four major landform regions



Source: MAPgraphics Pty Ltd Brisbane

Coastal Lowlands

The Coastal Lowlands around Australia's edge are narrow and fragmented. The plains often take the form of river valleys, such as the Hunter Valley in NSW, and include significant wetlands and estuaries.

Eastern Highlands

The Eastern Highlands include the Great Dividing Range and consist mainly of tablelands and plateaus. The area is rugged as rivers have cut deep valleys. It is the source of many of Australia's great rivers, including the Fitzroy, Darling and Murray. The highest part is in the south-east, where a small alpine area is covered with snow most of the year. Significant mountain peaks are found in the Australian Alps and Snowy Mountains, including Mount Kosciuszko.

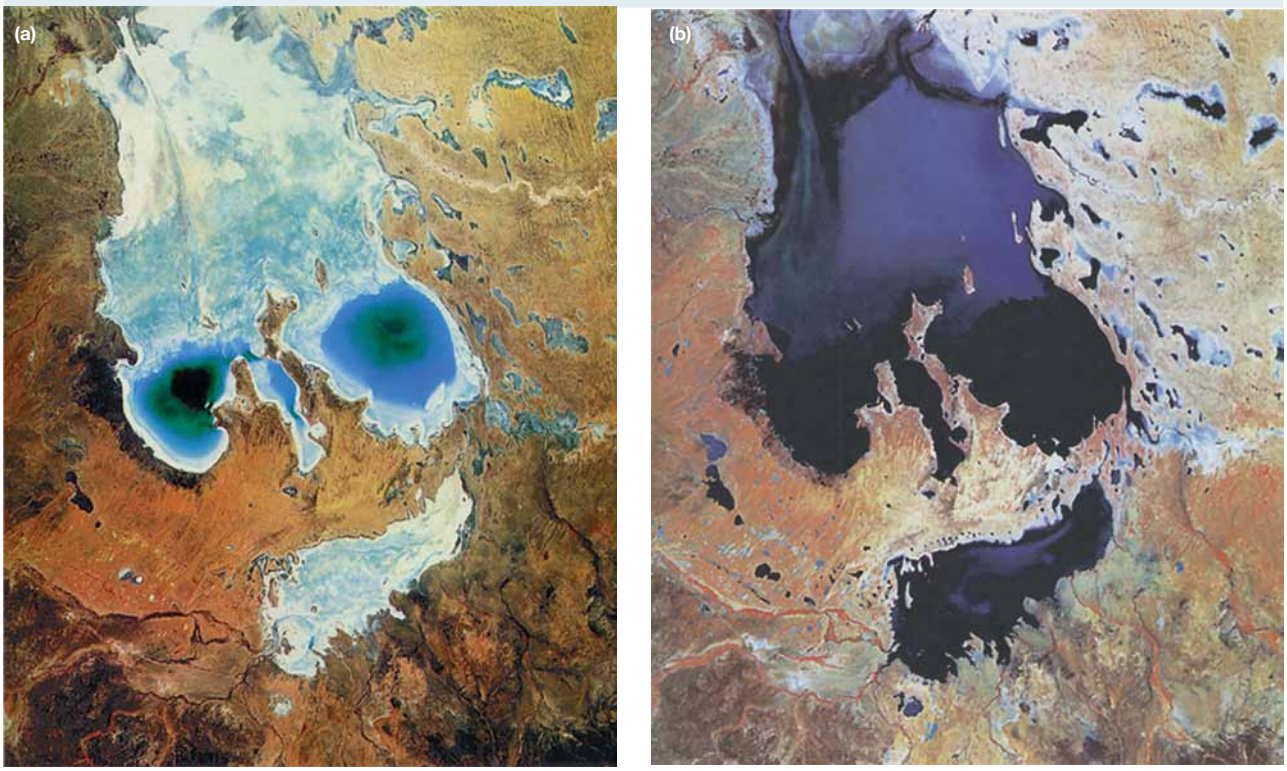
Central Lowlands

The Central Lowlands are a vast, very flat, low-lying land that contains three large **drainage basins**: the Carpentaria lowlands in the north, the Lake Eyre Basin in the centre (see **FIGURE 4**) and the Murray–Darling Basin in the south. The Great Artesian Basin, one of the largest and deepest underground freshwater reserves, is also in this region.

Great Western Plateau

The Great Western Plateau covers significant parts of Western Australia, South Australia and the Northern Territory. It is a huge area of tablelands, which are mostly 500 metres above sea level. It includes areas of gibber (stony) desert and sandy desert. There are several rugged upland areas, including the Kimberley and MacDonnell Ranges.

FIGURE 4 Kati Thanda–Lake Eyre, the lowest point on the Australian mainland, is part of the Great Artesian Basin. It is 15 metres below sea level. Once a freshwater lake, the region is now the world's largest salt pan. The evaporated salt crust shows white in the satellite image **(a)** below. The lake fills with water only three or four times each century, transforming it into a haven for wildlife. Deep water is shown as black in image **(b)** below.



SkillBuilder discussion

Geographical inquiry

1. Study **FIGURE 4**. Where is Kati Thanda–Lake Eyre located?
2. Explain why it only fills with water every three or four times each century.
3. Describe how this place changes from image (a) to image (b).

CASE STUDY
Water issues in the Murray–Darling Basin region

FIGURE 5 Mouth of Murray River near Goolwa at confluence of Mundoo and Goolwa Channels, with Hindmarsh Island and Lake Alexandrina in background, South Australia

- The Murray–Darling Basin spans one million square kilometres with over 20 rivers. It includes diverse landscapes from alpine areas to plains and produces 43% of Australia's food and 40% of its agricultural income. Covering 14.3% of the continent, its annual water flow equals a day's flow of the Amazon River.
- Severe problems affect the basin:
  - Only 20% of its water reaches the sea; the rest is used for agriculture, industry, and domestic purposes.
  - The Murray supplies 50% of Adelaide's drinking water, but quality declines due to rising salinity.
  - 50–80% of wetlands are damaged or destroyed, over a third of native fish species are endangered, and the number of water birds has halved.
  - Average river system inflows dropped from 9030 GL to 4820 GL annually over the last 20 years, with 2023 recording 1756 GL.
  - Climate change predictions suggest a 25–30% reduction in flow to the Murray River mouth by 2030 and 40–50% by 2050, drastically impacting water availability.

13.6.3 How does water flow across the land?

Permanent rivers and streams flow in only a small proportion of the Australian continent. Australia is the driest inhabited continent. It has:

- the least amount of run-off
- the lowest percentage of rainfall as run-off
- the least amount of water in rivers
- the smallest area of permanent wetlands
- the most variable rainfall and stream flow.

Australia has many lakes and drainage basins (see **FIGURE 7**) but many hold little water compared with those found on other continents. The largest drainage basins are in the tropical north, far from major population centres.

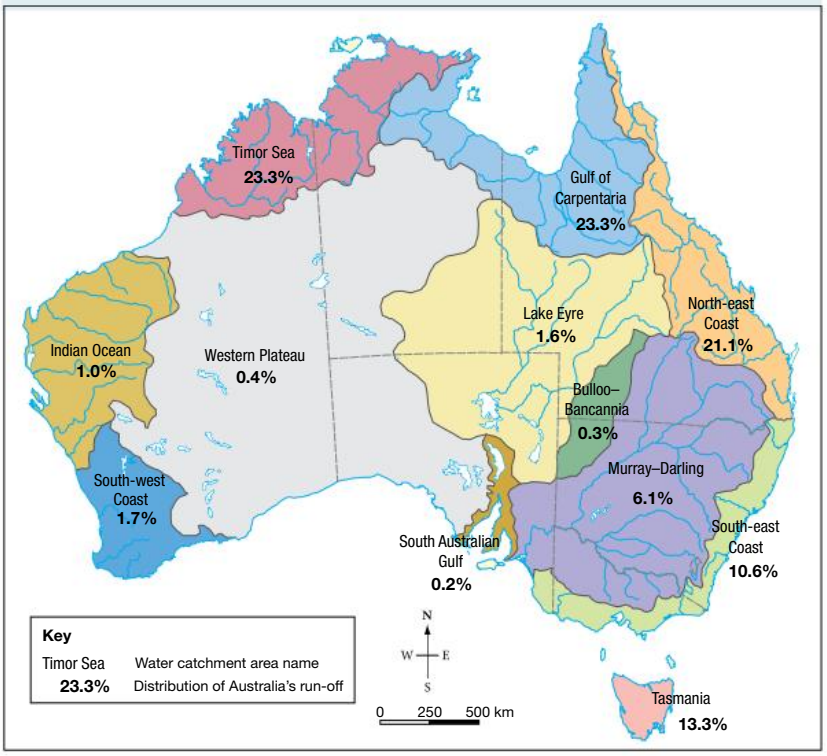
FIGURE 6 Lake Argyle is one of Australia's largest freshwater man-made reservoirs by volume.

SkillBuilder discussion

Communication

1. Some drainage basins are located in more than one state. What impact might this have on the management of these basins?
2. Identify the drainage basins that receive the highest and lowest amounts of run-off.
3. Suggest reasons to explain why drainage basins in the north have higher levels of run-off than those in the south.

FIGURE 7 Australia's drainage basins



Source: MAPgraphics Pty Ltd Brisbane

The Ord River Scheme near Kununurra in Western Australia was designed to harness water that flowed into the Timor Sea. The Ord River dam can hold up to 5641 gigalitres of water, the equivalent of 11.2 Sydney Harbours. The water is used to irrigate crops, transforming land once only suitable for cattle ranches into economically viable land for crops. However, the scheme is controversial. Critics argue it is a waste of money and an environmental disaster. Others view the scheme as a potential bread basket for Western Australia, providing thousands of jobs and export earnings.

13.6 SkillBuilder activity GEOGRAPHICAL INQUIRY, COMMUNICATING

Divide your class into five groups and assign groups 1 to 4 one of Australia's landform regions to investigate. Collectively **compile** a list of landforms that are found in each region, have each member of the group **investigate** a different landform and prepare a series of slides that show the following:

a. the landform
b. where it is located
c. how it was formed
d. its importance to Aboriginal and Torres Strait Islander Peoples
e. reasons why it is or is not a popular place that people want to visit.

Group 5 should use their atlas to **locate** the highest mountains in each Australian state and territory.

a. **State** the height of this mountain.
b. **Identify** where it is located.
c. **Explain** how it has changed over time.
d. **Discuss** its importance to Aboriginal and Torres Strait Islander Peoples — **explain** what creation story explains its formation.

Groups should work collaboratively online using Google Slides or a similar program to put their presentation together for viewing by the rest of the class.

13.6 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 4, 6	2, 3, 8, 10	5, 7, 9

REMEMBER AND UNDERSTAND

1. Circle the correct options to complete the passage below. The Murray–Darling Basin covers **one-seventh** / **one-fifth** of the Australian continent and is the largest drainage basin in Australia. It covers about **one** / **two** million square kilometres and is fed by more than **10** / **20** / **30** major rivers. The basin produces **25** / **43** / **62** per cent of Australia's food and over **40** / **60** / **90** per cent of Australia's agricultural income, making it the most important drainage basin in Australia.
2. Complete the following passage using the words below.

faulting	uplift	tectonic	crust	surface

Folding, faulting and uplift are processes that occur as a result of _____ activity. Pressures deep within the Earth's _____ cause the rocks that make up its _____ to buckle and fold, in much the same way that an aluminium can does when squeezed. Sometimes breaks occur or fractures develop, known as _____, and blocks or sections of the crust are pushed upwards, known as _____.

3. **Determine** whether the following statement is True or False.
Australia is so low in altitude and flat compared with other continents because the continent is located in the middle of a tectonic plate, has no active volcanoes and very little tectonic uplift from below.
4. **Describe** some of the physical changes Australia's landmass has undergone.
5. **Describe** the major characteristics of Australia's four main landform regions.

ANALYSE AND APPLY

6. Use your atlas to find the Cape Hillsborough and Macedon volcanoes, or refer to **FIGURE 2**.
   a. **Calculate** the distance between them.
   b. Use the information in this lesson to work out the rate at which the Australian landmass is moving.
   c. **State** how far Australia has moved over the Bass Strait hotspot. Now **calculate** where under Bass Strait this hotspot might be now.
   d. Use the information in this lesson to **explain** why this hotspot has changed its location over time.
7. It is said that the amount of water that flows down the Amazon River in a day is more than flows down the Murray River in a year.
   a. **Consider** what this tells you about the dryness of Australia's climate.
   b. **Describe** how this might affect the environment around the Murray River.
8. **Describe** the role of the Bass Strait hotspot in creating the landforms on Australia's east coast.
9. **Describe** how Kati Thanda–Lake Eyre has changed over time. **Identify** a reason for these changes.

EVALUATE AND COMMUNICATE

10. Approximately 80 per cent of the water flowing through the Murray–Darling Basin is diverted.
    a. **Identify** what this water is used for.
    b. **Predict** what impact this might have on people and the environment.

Answers and sample responses for this topic are available online.

LESSON 13.7 Rainforests and grasslands

LEARNING INTENTION

By the end of this lesson you should be able to:

- **describe** the characteristics and distribution of rainforests
- **describe** the characteristics and distribution of grasslands
- **explain** the importance of rainforests
- **compare** Australia's grasslands with those in the Serengeti.

Tune in

Aboriginal and Torres Strait Islander communities use fire sticks to light fires, referred to as 'cool burns' as a method of land management in grassland ecosystems. Only small areas are burnt, and careful attention is paid to the condition of the grass, temperature and winds. Fires are low and lit in the early morning or late afternoon when it is cooler to help prevent them from getting out of control. The dry undergrowth is burnt, reducing fuel load. The practice helps encourage new growth and maintains the grassland.

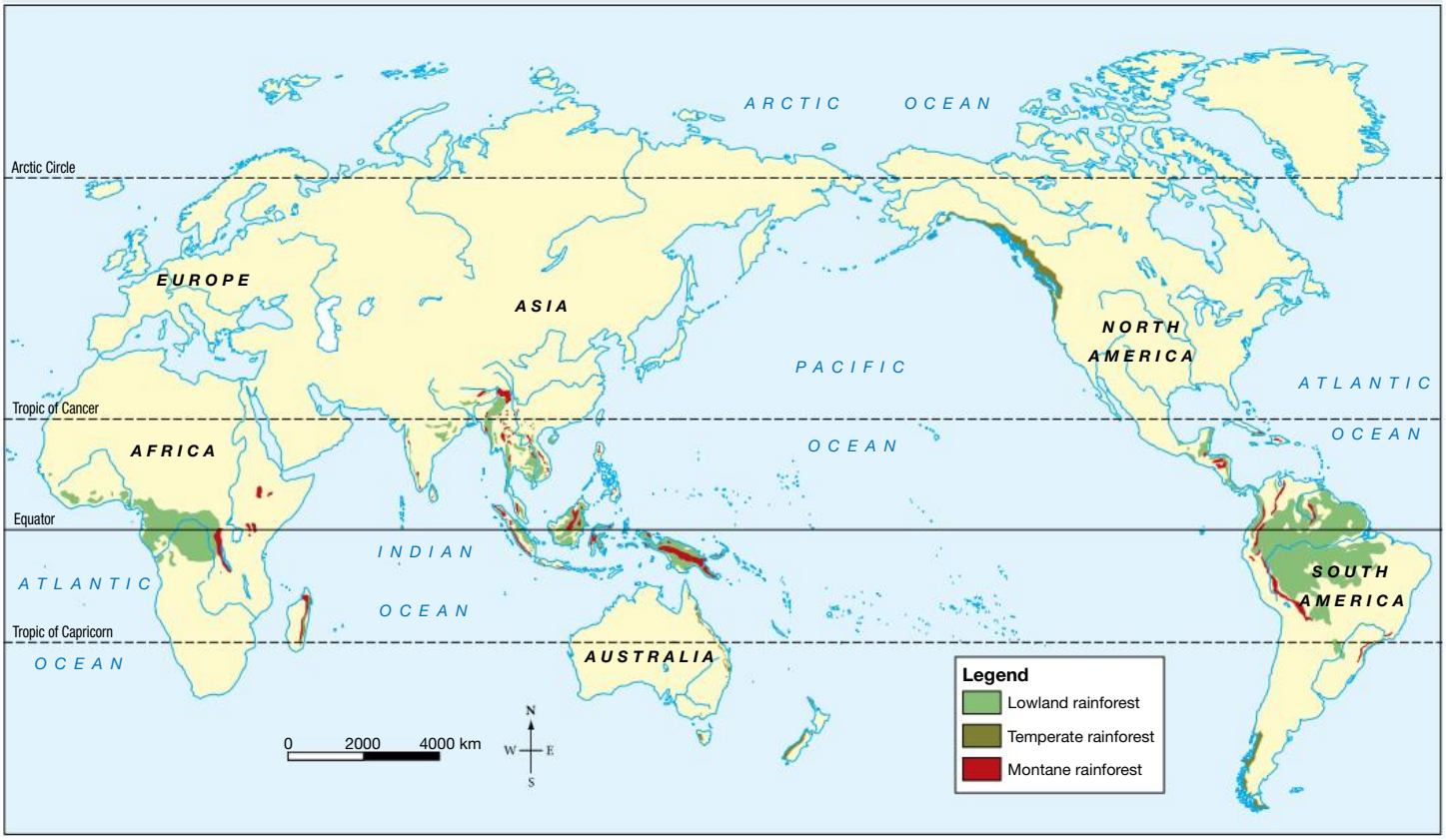
1. **Discuss with a partner the benefits of landscape burning.**
2. **It has been suggested that more selective burning of bushland should take place during winter to reduce the threat of bushfires in summer. Brainstorm a list of advantages and disadvantages of this suggestion.**

FIGURE 1 A cool burn

13.7.1 Where are the world's rainforests?

Rainforests are areas that are constantly wet. More than 1300 millimetres of rain spread evenly throughout the year is needed to support the tropical rainforest ecosystem.

FIGURE 2 World rainforest types



Source: MAPgraphics Pty Ltd Brisbane

SkillBuilder discussion

Communication

1. Study **FIGURE 2**. Decide what it is that makes something 'a rainforest'.
2. Do you think that all rainforests are the same? Explain.
3. What might it be like in a rainforest?

Tropical rainforests are located on both sides of the Equator between the Tropic of Capricorn and the Tropic of Cancer, where both temperatures and rainfall are high.

Montane rainforests are located at elevations of more than 1000 metres above sea level, and lowland rainforests are found below 1000 metres. Temperate rainforests, on the other hand, are located in the **temperate zone** lying between the tropics and polar regions.

DID YOU KNOW

Did you know that rainforests have been described as the Earth's lungs and are important carbon sinks? They take in carbon dioxide and store it in their leaves, branches and trunk. A by-product of photosynthesis is the production of the oxygen that we breath.

13.7.2 The rainforest ecosystem

Rainforests are unique **ecosystems** consisting of four different layers, each with distinct characteristics — the emergent, canopy, understory and forest floor (**FIGURE 3**).

FIGURE 3 Layers in a tropical rainforest

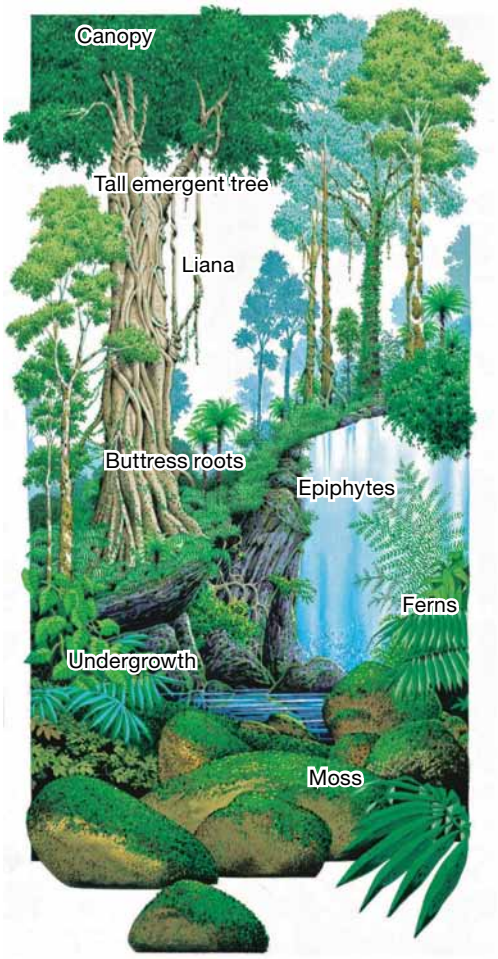


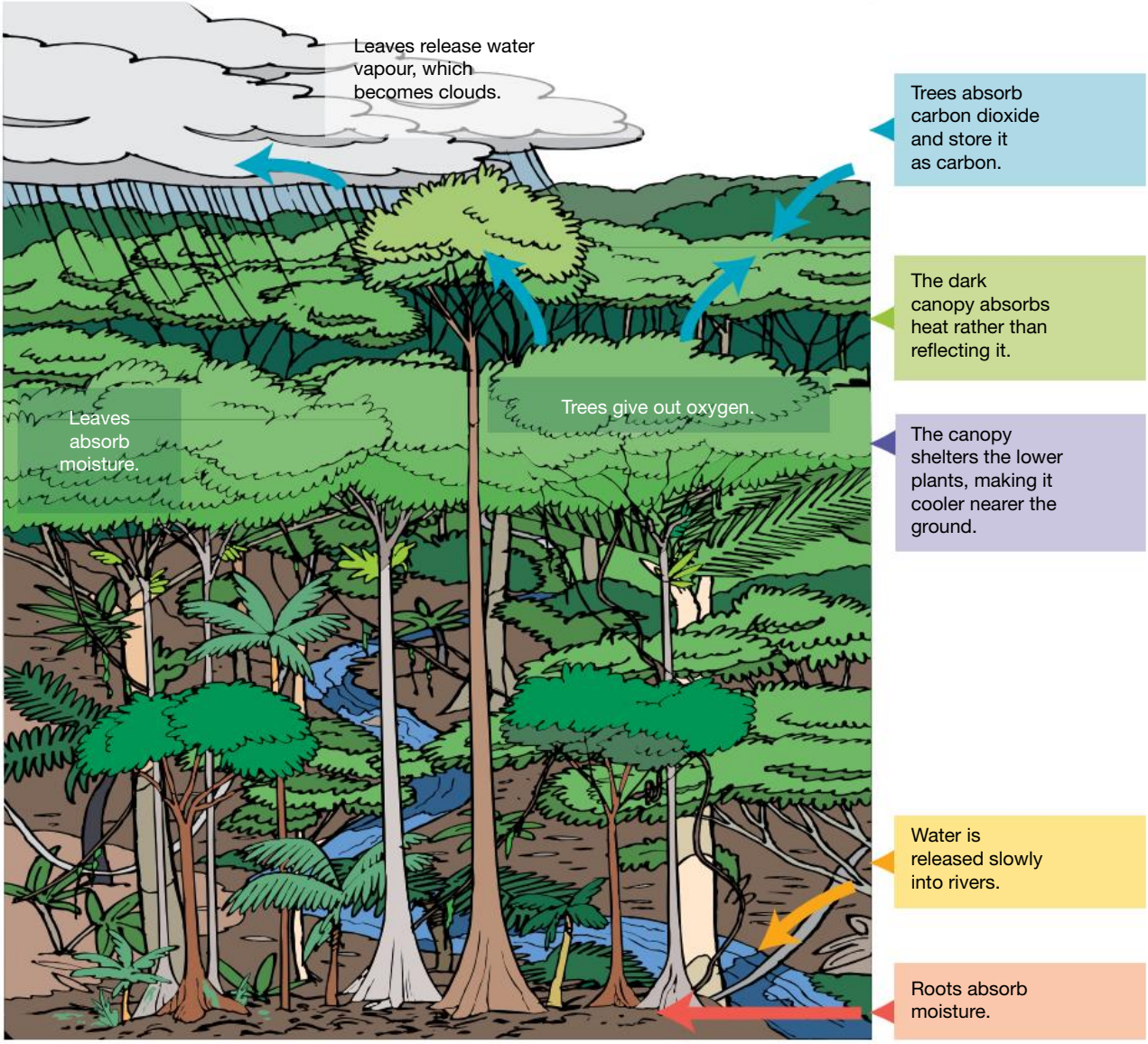
TABLE 1 The characteristics of the four different layers of the rainforest — the emergent, canopy, understory and forest floor

Layer	Height	Characteristics	Animal life
Emergents	30 to 50 metres	Rise out of the forest canopy, huge crowns of leaves	Abundant animal life
Canopy	20 to 45 metres	Dense layer of treetops, distinct microclimate, special vines (lianas), epiphytes	Variety of plants and animals
Understorey	Not specified	Mixture of smaller trees and ferns, receives about 5 per cent of the sun's energy	Many animals move around in darkness and humidity
Forest floor	Bottom layer	Thick carpet of leaves, fallen trees, huge buttress roots, poor soil, living compost	Larger animals roam in search of food

13.7.3 Amazing rainforests

We use rainforest products every day, plus they help control our climate and our oxygen supply (see **FIGURE 4**).

FIGURE 4 Rainforests play a vital role in controlling the world's climate and oxygen supply. Scientists believe that half of the world's oxygen is produced by the Amazon rainforest alone.



- Globally, at least 50 million Indigenous peoples live in or depend on rainforests. Examples include the Kuna people of Panama, the Yanomami of Brazil, the Baka of Cameroon and the Penan of Borneo (Indonesia) maintain their traditional lifestyle with minimal impact on the forest environment.
- Notable rainforest timbers include mahogany, teak, balsa and rosewood. These hardwoods are decay resistant and attractive for building. Rosewood, for instance, is valued in the manufacture of guitars. In many tropical countries, people timber is gathered as fuel for cooking and heating.

SkillBuilder discussion

Concluding and decision-making

1. List the products you use that you think come from a rainforest.
2. Do you think that we should rely on rainforests for these products? Discuss.
3. Rainforests are carbon sinks. What do you think this means and why is it important?

FIGURE 5 Many of the foods we eat come from rainforests.

- Chocolate originally came from the cacao tree, native to the Amazon rainforest. Today it is sourced from plantations in West Africa.
- Many fruits and nuts, now grown by farmers, were originally harvested from rainforests. These include Brazil and cashew nuts, cinnamon, ginger, pepper, vanilla, bananas, pineapples, coconuts, paw-paws, mangoes and avocados.
- The gum used in chewing gum and the tree that produces rubber are both found in the rainforest.

FIGURE 6 Only 1 per cent of known rainforest plants and animals have been analysed for their medicinal potential.

- Over 7000 modern medicines come from rainforest plants, addressing issues from headaches to malaria. Treatments for multiple sclerosis, Parkinson's disease, leukemia, asthma, acne, arthritis, glaucoma, diabetes, dysentery and heart disease originate in rainforests.
- Cacao helps lower cholesterol, blood sugar and heart disease risk. Australian tree frogs produce chemicals for healing sores, and South American frogs provide powerful painkillers.
- Twenty-five per cent of all cancer-fighting drugs come from rainforests.

13.7.4 Where have our rainforests gone?

The world's rainforests are being destroyed for economic gain (see **FIGURE 7**).

- Around 36 per cent of the Earth's surface is covered by rainforests.
- 21 per cent of the Earth's rainforests are protected from deforestation.
- More than 28.3 million hectares of rainforest were lost between 2000 and 2024.
- Globally around 2400 trees are cut down each minute — enough to fill four Australian Rules football fields.
- Collectively 2400 trees store 5660 metric tons of carbon — equivalent to the carbon emissions of 1230 cars driven for a year.
- NASA estimates that by 2100 there may be no rainforest left.

Factors causing deforestation

Deforestation is the process of clearing forests or trees, often to make way for agriculture, urban development or logging. It leads to the loss of biodiversity, disrupts ecosystems and contributes to climate change by reducing the amount of carbon absorbed by trees.

SkillBuilder discussion

Concluding and decision-making

Look at **FIGURE 7**. List, and discuss, all the impacts of gold mining in the Amazon, on people, place and environment.

FIGURE 7 Illegal gold mining in the Amazon destroys the rainforest and contaminates rivers with mercury.

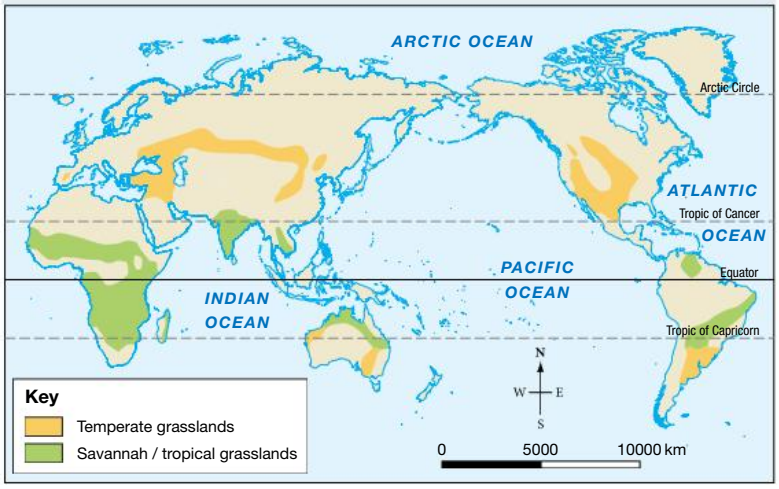
TABLE 2 Causes of deforestation

Cause	Description
Agricultural production	Plantation crops such as soy, palm oil; agricultural pasture for grazing, plus infrastructure accounts for two-thirds of deforestation.
Forest fires	Degraded forests are more prone to uncontrolled natural fires. Some are deliberately lit to clear an area for other uses.
Illegal and unsustainable logging	Forest timbers are in high demand on international commercial markets.
Fuelwood harvest	For those living in poverty the forest is a cheap source of fuel and commercially as charcoal.
Mining	Land is cleared to extract the rich supply of minerals and build roads for easy access.
Climate change	Reduces rainfall and increases temperatures which dry out the rainforest and increase the risk of fire.

13.7.5 What is a grassland?

Temperate and tropical grasslands, often called savannas, are dominated by an almost continuous cover of grass. They are a transitional zone between rainforests and deserts. Rainfall levels are too high to be classified as a desert, but not enough to support the tall trees and dense vegetation of a rainforest (see **FIGURE 8**).

FIGURE 8 Grasslands are found on every continent except Antarctica.



Source: Based on data from Geography Teachers Associations of NSW. Map redrawn by Spatial Vision.

Grasslands have a 'park like' appearance, due to the absence of trees. When present, trees are scattered and often 'flat topped' resembling stunted shrubs. Narrow strips of trees, referred to as 'gallery forests', are found rivers and streams.

The ecosystem is maintained by grazing animals and Indigenous communities who use fire to manage the landscape. Fire prevents tree growth and encourages the growth of grass which attracts grazing animals. Grasslands can easily be converted to desert if not managed carefully.

Savanna grasslands have three main characteristics: wet summers, dry winters, and hot all year round.

- wet summer — the wet
- dry winters — the dry
- hot all year round.

13.7.6 The Serengeti grasslands

Located in northern Tanzania and south-west Kenya the Serengeti grassland ecosystem has rich volcanic soils and the mass migration of animals has a positive ecological impact on the area.

The Masai live a traditional nomadic lifestyle as cattle herders, subsisting off their herds and the land; they believe that sedentary agriculture damages the environment.

Today, their lifestyle is threatened by restrictions imposed by drought; the government limits how land can be used within a national park. The tourism industry operates under strict conditions (**FIGURE 9**).

FIGURE 9 The lifestyle of the Masai and the opportunity to go on a wildlife safari has resulted in a massive influx of tourists into the Serengeti.

13.7.7 Australian grasslands

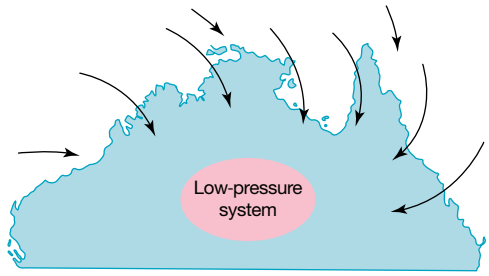
Australia's top end, stretching from Broom in the west to Townsville in the east, is a tropical grassland or savanna landscape. Aboriginal and Torres Strait Islander Peoples have maintained this environment for thousands of years by using cool burns to encourage new plant growth. A distinct wet season corresponds with the monsoon season (**FIGURE 10**). The lives of Aboriginal and Torres Strait Islander Peoples in northern Australia are governed by changes that occur due to the wet and dry seasons.

SkillBuilder discussion

Geographical inquiry

1. When is the monsoon season in northern Australia? Support your answer with evidence from the map.
2. What type of weather do you expect during the monsoon season?
3. When do you think cool burns would be used in this region? Justify your answer.

FIGURE 10 Australia's wet and dry seasons are the result of air movements and pressure systems.

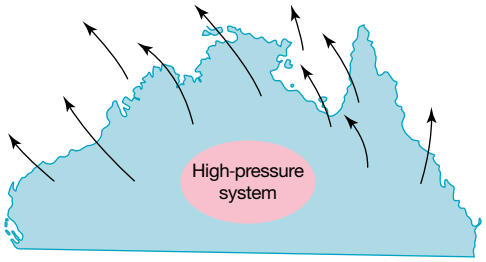


a. Summer months

→ Major wind direction

In summer

- The land heats up; the air is hot and light.
- Hot air rises and cools, creating a low-pressure system.
- Air moves in from over the ocean to replace the rising air.
- This air is wet and brings rain to northern Australia.



b. Winter months

→ Major wind direction

In winter

- The land cools down.
- The air is heavy and sinks, creating a high-pressure system.
- The air is dry as it has passed over the interior of the continent.
- Dry air moves to the north, bringing dry weather to northern Australia.

13.7 SkillBuilder Activity GEOGRAPHICAL INQUIRY, COMMUNICATION

TABLES 1 and **2** contain the climate statistics for Cloncurry in Australian and Serengeti National Park in Tanzania. The lives of Indigenous communities are often governed by the climatic changes that take place throughout the year.

TABLE 1 Cloncurry Australia 21°S

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Temp °C	31	30	29	26	22	19	18	20	23	27	30	31
Rain mm	112	108	61	18	13	15	8	3	8	13	33	69

TABLE 2 Serengeti National Park Tanzania 2°S

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Temp °C	28	28	28	26	25	25	25	26	27	28	27	27
Rain mm	81	100	121	137	68	23	9	19	34	51	100	97

1. **Create** climate graphs, using geographic conventions, for both Cloncurry and Serengeti National Park.
2. Both places have a wet and a dry season. **Explain** what you understand by the terms wet and dry season.
3. The lives of the people in the Northern Territory recognise six seasons and their lives are governed by these seasons. Use the **Ngurrungurrudjba** weblink in the Resources panel to learn more about the way Aboriginal and Torres Strait Islander Peoples recognise changes in the environment. **Create** a calendar of seasons, or annotate your climate graph to show what occurs in each season.

13.7 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5, 6, 7	8, 9, 10

REMEMBER AND UNDERSTAND

1. Fill in the gaps:
   Rainforests thrive in locations that receive _____ of rainfall evenly spread throughout the year. This is most commonly experienced in the equatorial regions of the planet, where climatic conditions are moist and warm all year round.
2. **Compare** montane and lowland forests by inserting the correct type into the spaces.
   _____ rainforests are found at altitudes below 1000 metres. Trees are tall and include a great variety of fruiting trees.
   _____rainforests are found at an altitude of 1000 metres or higher. They are not as threatened as others.
3. **Explain** why rainforests are sometimes called the 'lungs of the Earth'.
4. Refer to **FIGURE 8**. The largest area of grassland is found in:
   a. Africa.
   b. Australia.
   c. Europe.
   d. Antarctica.
5. **Identify** the continent that does not have any grasslands.
   a. Europe
   b. Asia
   c. Antarctica
   d. Africa

ANALYSE AND APPLY

6. **Explain** why grasslands are described as a transitional landscape.
7. a. **Identify** the name given to the tallest trees in the rainforest.
   b. **Explain** why they were given this name.
8. Answer the following questions.
   a. **Explain** why there are few trees in grasslands.
   b. **Define** the term *gallery forest*.
   c. **Propose** a reason why gallery forests are usually found along watercourses, even when the watercourse is dry.

EVALUATE AND COMMUNICATE

9. Many rainforest environments are located in developing countries. **Explain** why this makes the problem of rainforest destruction harder to solve.
10. Soils in the rainforest are generally poor, but they are able to support so much vegetation. **Discuss** why the rainforest is able to support so much vegetation but cannot sustain agricultural production without the additional use of fertilisers.

Answers and sample responses for this topic are available online.

LESSON 13.8 Deserts in Australia and China

LEARNING INTENTION

By the end of this lesson you should be able to:

- **describe** the global distribution of deserts
- **identify** and make comparisons between important desert landscapes in Australia and China
- **explain** why Uluru is an iconic Australian landmark.

Tune in

The actions of wind, and sometimes water, shape the rich variety of landscapes found in the desert regions of the world. Deserts may be hot or cold, and subject to temperature extremes.

1. **What processes do you think created the landscape shown in FIGURE 1?**
2. **How can some deserts be hot, while others are cold?**
3. **Work with a partner to brainstorm a list of characteristics that define the desert landscape.**
4. **As a class, create a combined list of the characteristics of deserts.**

FIGURE 1 While the extreme conditions make it difficult for people to survive, there are many desert locations around the world where people can and do live.

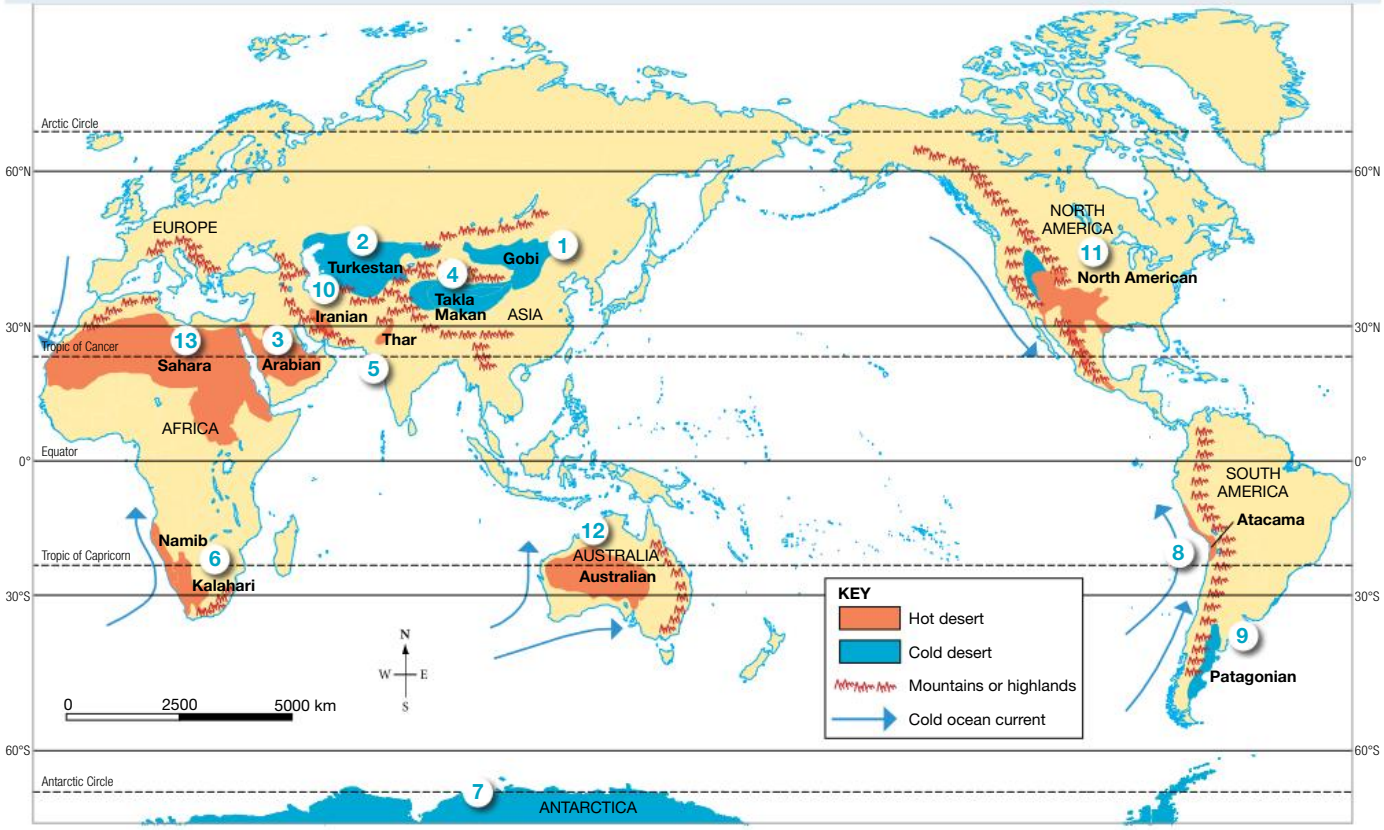
13.8.1 What defines a desert?

Deserts are hot or cold regions with little or no rainfall. Around one-third of the Earth's surface is desert, and they are home to about one billion people. Although they receive little rainfall, most deserts receive some form of precipitation. Rain usually occurs as a few heavy storms that last a short time and can be so intense that normally dry rivers overflow their banks.

TABLE 1 Rainfall levels in different types of desert

Rainfall (mm/year)	Type of desert	Examples
< 25	Hyper-arid	Namib; Arabian
25–200	Arid	Mojave
200–500	Semi-arid	Parts of Sonoran Desert

FIGURE 2 Distribution of the world's deserts



Source: MAPgraphics Pty Ltd, Brisbane

1 **Gobi Desert:** Asia's largest desert is a cold desert. Situated 900 metres above sea level, it covers around 1.2 million square kilometres. Its winters can be freezing.

2 **Turkestan Desert:** The cold Turkestan Desert covers parts of south-western Russia and the Middle East.

3 **Arabian Desert:** This is a hot desert, and as big as Australia's deserts. To the south is Rub al-Khali (meaning 'empty quarter'), which has the largest area of unbroken sand dunes, or ergs (shifting sand dunes), in the world.

4 **Takla Makan Desert:** The Takla Makan ('place of no return') Desert is a cold desert in western China. The explorer Marco Polo crossed it some 800 years ago.

5 **Thar Desert:** The Thar Desert is a hot desert covering north-western parts of India and Pakistan. Small villages of around 20 houses dot the landscape.

6 **Kalahari and Namib deserts:** The Namib Desert extends for 1200 metres along the coasts of Angola, Namibia and South Africa. It seldom rains, but early-morning fog from the ocean often leaves dew behind, providing moisture for plants and animals. It joins the Kalahari Desert, which is about 1200 metres above sea level.

7 **Antarctic Desert:** The world's biggest and driest desert, the continent of Antarctica is a cold desert. Only snow falls there, equivalent to about 50 millimetres of rain per year.

8 **Atacama Desert:** The Atacama Desert is the driest hot desert in the world. Its annual average rainfall is a tiny 0.1 millimetre.

9 **Patagonian Desert:** The summer temperature of this cold desert rarely rises above 12 °C. In winter, it is likely to be well below zero, with freezing winds and snowfall.

10 **Iranian Desert:** Two large deserts extend over much of central Iran. The Dasht-i-Lut is covered with sand and rock, and the Dasht-i-Kavir is covered in salt. Both have virtually no human population.

11 **North American deserts:** The desert region in North America is made up of the Mojave, Sonoran and Chihuahuan deserts (all hot deserts) and the Great Basin (a cold desert). The Great Basin's deepest depression, Death Valley, is the lowest point in North America.

12 **Australian deserts:** After Antarctica, Australia is the driest continent in the world. Its deserts are generally flat lands, often vibrant in colour.

13 **Sahara Desert:** The largest hot desert in the world, the Sahara covers around 9 million square kilometres over 12 countries across northern Africa. Only a small part is sandy. It is the sunniest place in the world.

Hot deserts

Most hot deserts are located between the Tropic of Cancer and the Tropic of Capricorn (see **FIGURE 2**). Summers are hot and winters warm. As cloud cover is rare, the ground heats during the day and escapes at night, making temperature extremes common. Temperatures can range between 45 °C and –15 °C in a 24-hour period.

Cold deserts

Cold deserts lie on high ground north of the Tropic of Cancer and south of the Tropic of Capricorn (see **FIGURE 2**). They include the polar deserts. Any precipitation falls as snow. Winters are very cold and often windy; summers are dry and cool to mild.

13.8.2 Desert dwellers

Many people in desert regions live a nomadic lifestyle and move with the seasons, obtaining their needs from the land or trade. Some herd animals. The harsh climate and lack of water make it difficult for large cities to develop, other than in coastal areas where rivers provide a reliable water supply.

13.8.3 Comparing deserts in China and Australia

Deserts exist in different parts of the world (**FIGURE 2**): the subtropics, interior of continents, leeward sides of mountain ranges, along the coast and in polar regions. The only common factor is low rainfall.

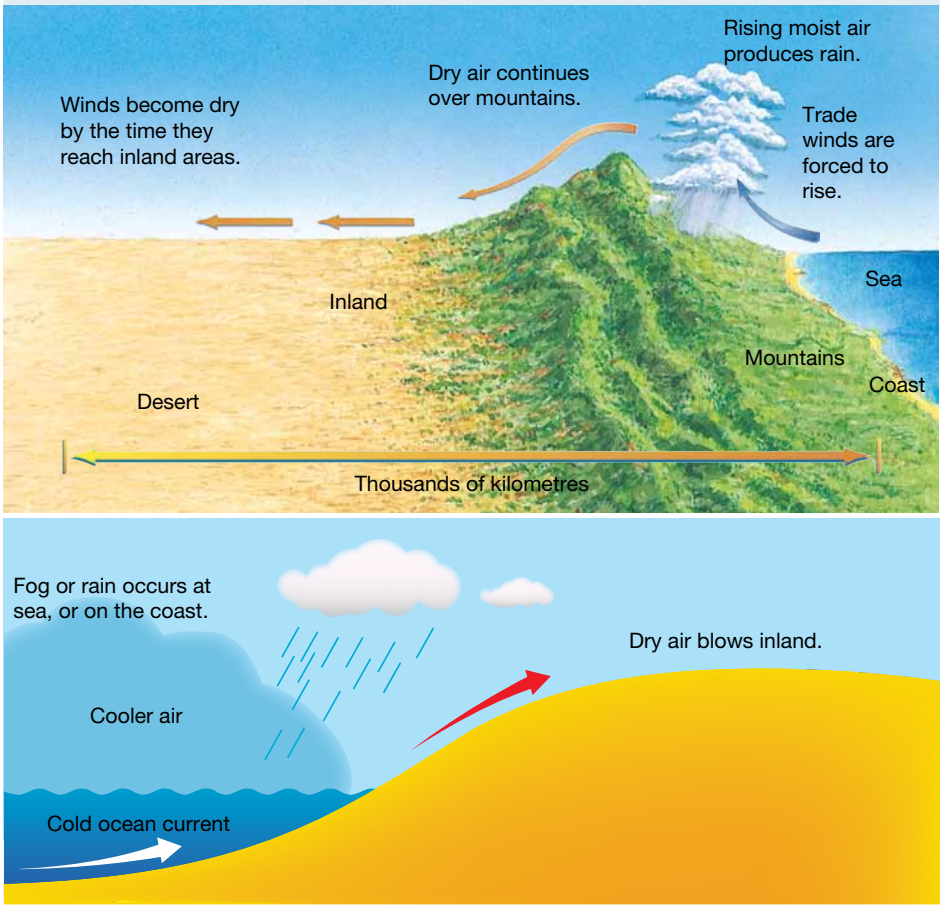
- The Gobi Desert is both a **rain-shadow** (**FIGURE 3**) and inland desert.
- Australia's deserts are rain-shadow and coastal (**FIGURE 3**) deserts.

SkillBuilder discussion

Geographical inquiry

1. Study **FIGURE 3**. What is the direction of the prevailing winds in each image?
2. What happens to the winds once they pass over the land?
3. Write two or three sentences to explain how each type of desert forms.

FIGURE 3 **(a)** The formation of rain-shadow deserts and **(b)** the formation of coastal deserts



The Gobi Desert

The Gobi Desert is the second-largest desert in Asia and the sixth-largest in the world, spanning north-western China and southern Mongolia.

As a rain-shadow desert, it lies on the leeward side of the Tibetan Plateau, with the Himalayan Mountains blocking precipitation from the Indian Ocean. Located 43 degrees north of the equator, winter temperatures can drop to –45 °C, with rare summer highs of up to 45 °C. The landscape is varied, with only about 5 per cent being sand. Grassy plains appear when snow melts, and the region is a significant paleontological site, with fossils more than 88 million years old preserved by the cold conditions.

Australian deserts

Australia, the world's driest inhabited continent, has around 70 per cent of its land classified as arid or semi-arid, but only 18 per cent is true desert. Uluru sits within the semi-arid desert environment of the central Australian outback, in the Northern Territory.

SkillBuilder discussion

Concluding and decision-making

1. How do you think Uluru was formed?
2. Suggest why Uluru is a place of cultural significance to Anangu People.
3. Should Uluru be open to tourists?

FIGURE 4 Uluru is an **inselberg** that rises above the surrounding landscape. To the Anangu People, it is a significant landmark created during the Dreaming and seen as the resting place for generations of ancient spirits.

Australian deserts, located between the equator and Tropic of Capricorn, are classified as hot deserts. They receive less than 250 millimetres of rainfall annually. In summer, temperatures can soar past 50 °C. Humidity levels are low, ranging between 10 and 20 per cent.

Australian deserts such as the Simpson Desert are rain-shadow deserts. The Great Dividing Range blocks warm moisture-laden air from the east coast from reaching the continent's interior. Additionally, cold ocean currents along the west coast contain little moisture and the winds are dry as they move inland.

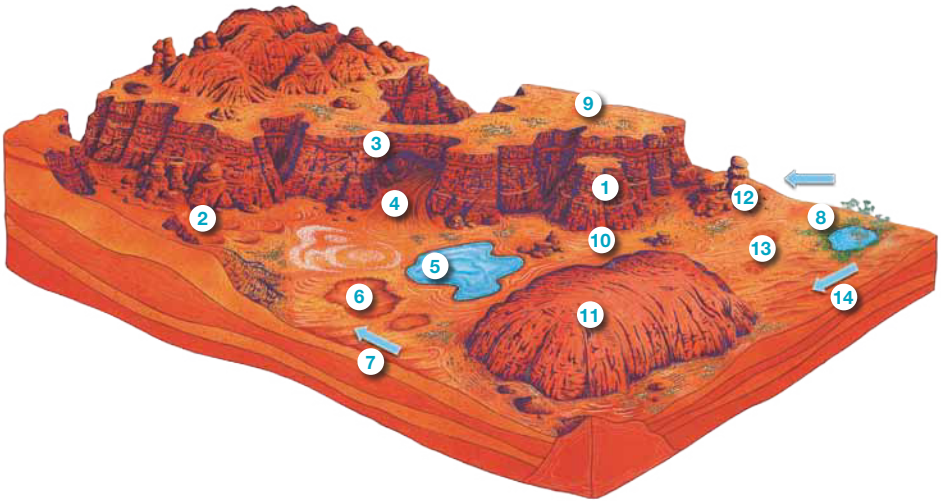
The Australian desert landscape is varied, and includes sandy deserts, grassy plains and gibber plains (stony areas). The dry climate has resulted in the preservation of fossil remains.

13.8.4 What processes shape desert landforms?

Sand covers about 20 per cent of the world's deserts. This sand is the result of millions of years of erosion of rocks and plateaus by extremes of temperature, wind and water.

Several natural processes have combined to create desert landforms and patterns. Unprotected surfaces are prone to erosion, especially after heavy rain, which may lead to significant erosion of ancient river channels. Extreme temperatures, strong winds and rushing water after desert rainstorms cause rocks to break down into smaller fragments through the process of weathering. Materials carried by water and wind are eventually deposited in new locations. Over time these materials build up, forming different shapes and patterns in the desert.

FIGURE 5 A variety of landforms are found in the desert. They result from the actions of wind and water. Can you pick the landforms created by erosion and those created by deposition?



1. **A butte** is the remaining solid core of what was once a mesa. It is often shaped like a castle or a tower.
2. **Crescent-shaped barchan dunes** are produced when sand cover is fairly light.
3. **An arch, or window,** is an opening in a rocky wall that has been carved out over millions of years by erosion.
4. **An alluvial fan** is the semicircular build-up of material that collects at the base of slopes and at the end of wadis after being deposited there by water and wind.
5. **A playa lake** may cover a wide area, but it is never deep. Most water in it evaporates, leaving a layer of salt on the surface. These salt-covered stretches are called salt pans.
6. **Clay pans** are low-lying sections of ground that may remain wet and muddy for some time.
7. **Transverse dunes** have a rippled surface, due to gentle breezes consistently blowing in one direction.
8. **An oasis** is a fertile spot in a desert. It receives water from underground supplies.
9. **A mesa** is a plateau-like section of higher land with a flat top and steep sides. The flat surface was once the ground level, before weathering and erosion took their toll.
10. **Sand dunes** often start as small mounds of sand that collect around an object such as a rock. As they grow larger, they are moved and shaped by wind.
11. **An inselberg** is a solid rock formation that was once below ground level. As the softer land around it erodes, it becomes more and more prominent. Uluru is an inselberg.
12. **A chimney rock** is the pillar-like remains of a butte.
13. **Star dunes** are produced by wind gusts that swirl in from all directions.
14. **Longitudinal dunes** form when strong winds blow in one direction.

13.8 SkillBuilder activity COMMUNICATING

The significance of Lake Mungo

The hot dry climate of Australia's deserts has allowed them to preserve much of their ancient history. Lake Mungo in the Willandra Lakes Region of New South Wales has revealed evidence of continuous human settlement by Australia's Aboriginal Peoples.

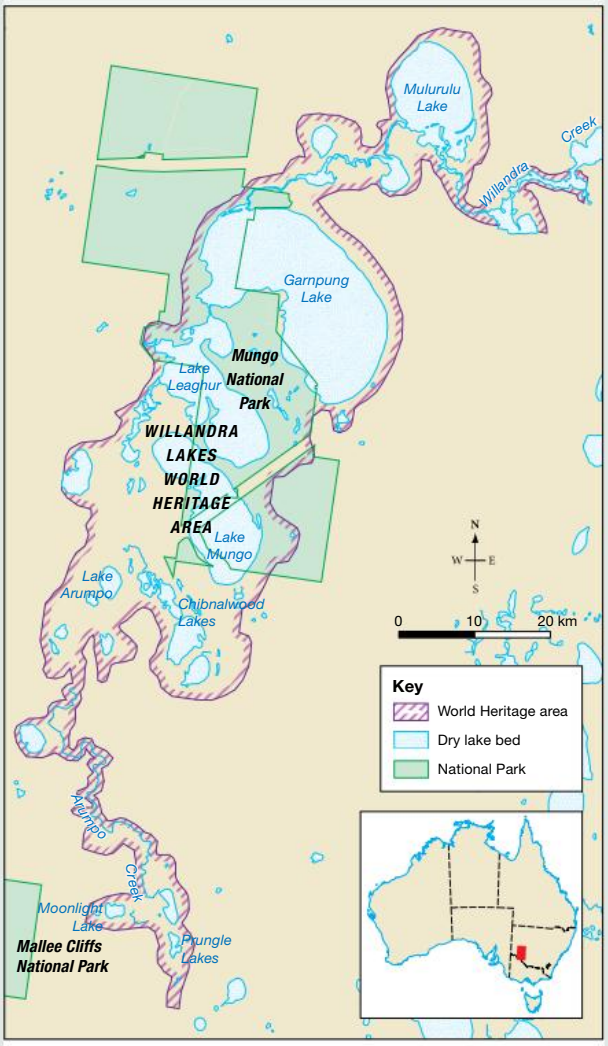
The Willandra Lakes Region is a World Heritage area, important for its archaeology and geomorphology. It holds deep cultural significance to Australia's Aboriginal and Torres Strait Islander Peoples.

Use the Internet to **investigate** the following:

1. How has Lake Mungo changed over time? Begin with its formation through to the present. Use the **Timeline maker** weblink to **communicate** your findings.
2. **Create** a poster to **explain** what the World Heritage List means and why this place is culturally significant to Australia's Aboriginal and Torres Strait Islander Peoples.

FIGURE 7 Traditional custodians clean fossils at Lake Mungo.

FIGURE 6 Location of Willandra Lake, including Lake Mungo



Source: Spatial Vision

13.8 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4, 5	3, 7, 8, 9	6, 10

REMEMBER AND UNDERSTAND

1. **Identify** the sunniest place in the world from the following list.
   a. Antarctica
   b. Australian desert
   c. Sahara Desert
   d. Namib Desert
2. Refer to the **FIGURE 2** map and **identify** two deserts in the Asia–Pacific region.
   a. Patagonian
   b. Thar
   c. Australian
   d. Iranian
   e. Gobi
   f. Arabian
3. **Determine** whether the following statements are True or False.
   a. Hot deserts are located between the tropics of Cancer and Capricorn.
   b. Cold deserts are found only at high altitudes.
   c. Hot deserts are always hot.
   d. Cold deserts are always cold.
   e. In cold deserts, precipitation falls as snow.
4. **Describe** the climate conditions that are needed for hot and cold deserts to form.
5. **Identify** the major line of latitude on which Australian deserts are located.

ANALYSE AND APPLY

6. The Gobi Desert is a land of climate extremes. **Justify** the classification of the Gobi Desert as a cold desert.
7. **Describe** why Uluru is considered an iconic Australian landmark.
8. **Explain** the factors that have resulted in the formation of Australia's desert region.
9. **Compare** the characteristics of the Gobi Desert and the Australian desert region.

EVALUATE AND COMMUNICATE

10. **Discuss** reasons that account for the rich source of well-preserved fossil remains in desert regions.

Answers and sample responses for this topic are available online.

LESSON 13.9 What are underground landscapes?

LEARNING INTENTION

By the end of this lesson you should be able to **describe** some of the different types of landforms within different types of landscapes, such as karst (cave) landforms.

Tune in

Did you know that the rocks that make up the karst landscape are composed of limestone and dolomite? Both are carbonate rocks (a subclass of sedimentary rocks). They are highly susceptible to a form of chemical weathering known as oxidation (a chemical reaction that causes rocks to break down due to the presence of water, oxygen or acid).

1. **How do you think sedimentary rocks were formed?**
2. **You can see oxidation at work when you cut an apple and it turns brown. What do you think is causing oxidation?**
3. **Brainstorm how you think the structures shown in FIGURE 1 were formed.**

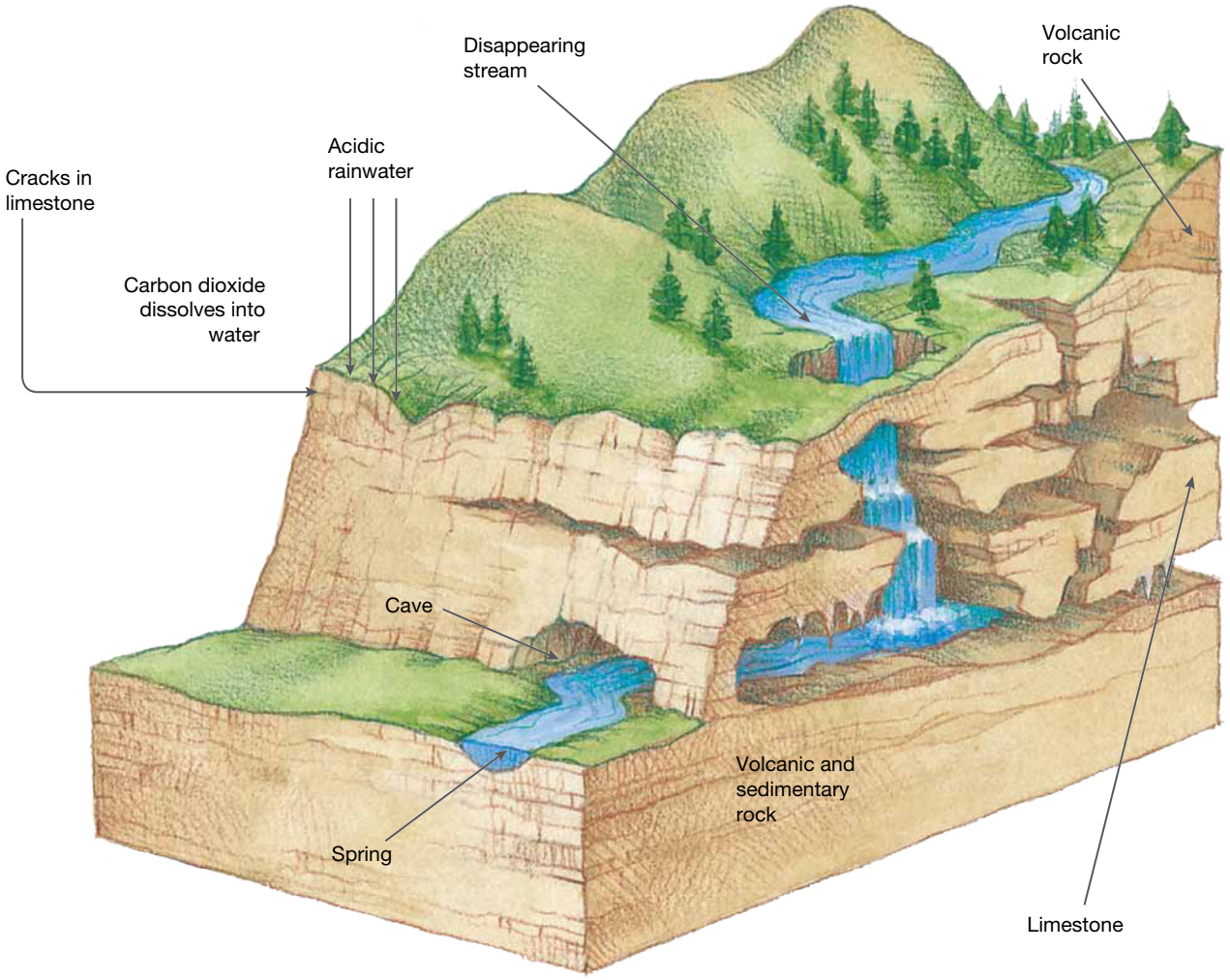
FIGURE 1 Lake Cave, Margaret River, Western Australia

13.9.1 What is karst?

Apart from surface rivers and streams, there are vast networks of underground rivers. The result is a network of caves and channels that carve a vastly different landscape known as karst.

Karst landscapes form over hundreds of thousands of years as water dissolves bedrock (**FIGURE 1**). On the Earth's surface, sinkholes (holes), vertical shafts (tunnels) and fissures (cracks) will be evident. Rivers and streams seem to disappear, as they make their way into intricate drainage networks underground, complete with **stalactites** and **stalagmites** (**FIGURE 2**).

FIGURE 2 Formation of a karst landscape



SkillBuilder discussion

Geographical inquiry

1. Look at **FIGURE 2**. Explain why the stream seems to disappear.
2. What do you think causes acidic rainfall?
3. What type of rock erodes to form the karst landscape?
4. Do you think this rock would erode if the rainwater were not acidic?

Karst topography makes up about 10 per cent of the Earth's surface; however, a quarter of the world's population depend on karst environments to meet their water needs.

13.9.2 How are karst landscapes formed?

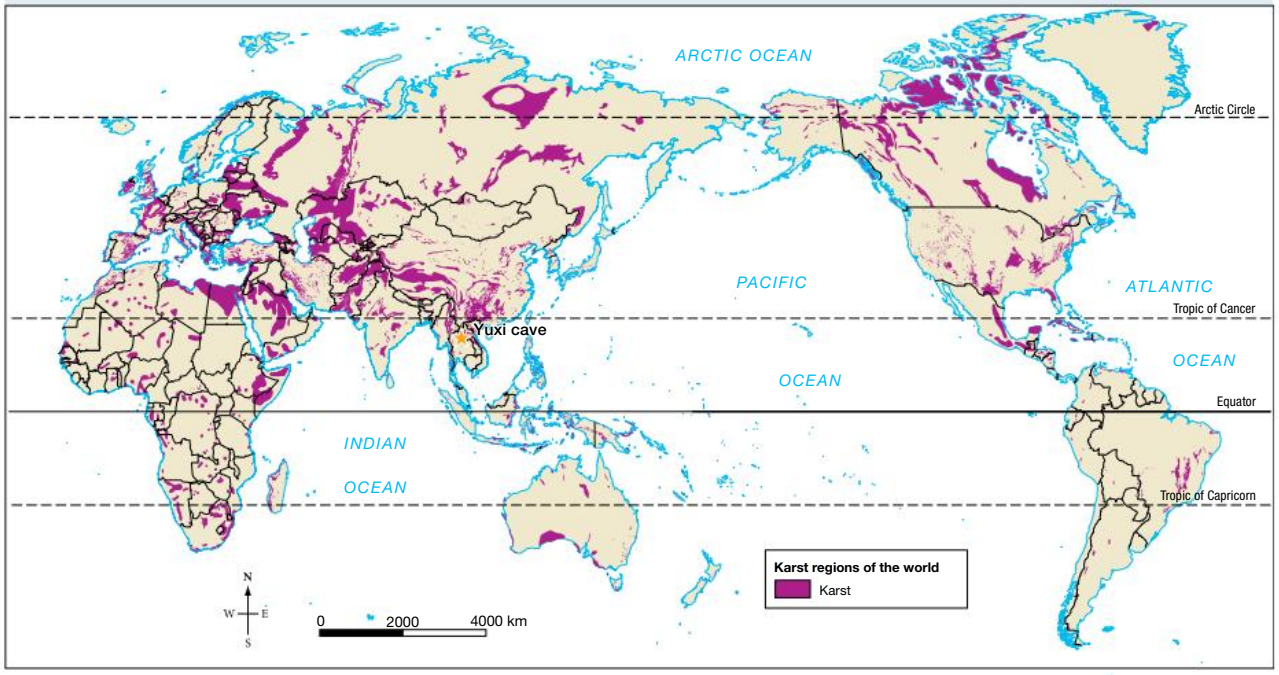
Water becomes slightly acidic when it interacts with carbon dioxide in the atmosphere or filters through organic matter in the soil and **percolates** into the ground. Acidic water can dissolve **soluble** bedrock such as limestone and dolomite, creating cracks and fissures that allow more water to penetrate the rocks.

When water reaches a layer of non-dissolving rock, it erodes sideways, forming underground rivers or streams. Over time, water creates hollows that eventually develop into caves. Some karst landscapes contain aquifers capable of providing large amounts of water.

13.9.3 Where are karst landscapes found?

As shown in **FIGURE 3**, karst landscapes are found all over the world.

FIGURE 3 Karst regions of the world



Source: World Map of Carbonate Rock Outcrops v3.0

SkillBuilder discussion

Geographical inquiry

1. Which hemisphere has the most karst landscapes?
2. Suggest a reason why that is the case.

In tropical regions, with high levels of rainfall, karst mountains may develop as rain erodes the soluble rock much faster than in areas with lower rainfall. Examples of tropical karst mountains include the peaks of Halong Bay in Vietnam and the Guilin Mountains in China.

Australia's Nullarbor Plain is home to the Earth's largest arid limestone karst cave system, spanning 270 000 square kilometres. It stretches 2000 kilometres from the Eyre Peninsula in South Australia to Norseman in Western Australia's Goldfields–Esperance region, and from the Bunda Cliffs on the Great Australian Bight in the south to the Victoria Desert in the north.

The extensive cave system provides a unique habitat for a variety of native flora and fauna. Within the caves are fossils that reveal much about our distant past; fossils of thylacines (Tasmanian tigers) have been found in the cave systems south of Perth. Additionally, these caves are important Aboriginal and Torres Strait Islander heritage sites.

13.9 SkillBuilder activity QUESTIONING AND RESEARCHING, COMMUNICATING

Examples of karst landscapes in Australia include the caves Buchan, Naracoorte, Jenolan, Labertouche, Princess Margaret Rose, Judbarra and Abercrombie, and the Nullarbor Plain.

1. Working with a partner, **investigate** one of these environments and **create** an annotated visual display. Show the location of your karst environment on a map and include:
   - the scale
   - features
   - land use
   - any concerns or threats to the environment.

   Include information on what is being done to ensure the sustainable management of the place and the significance of this place to Aboriginal and Torres Strait Islander Peoples.
2. **Communicate** your findings to the rest of the class in a brief presentation.

13.9 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 6	3, 4, 5, 8	7, 9, 10

REMEMBER AND UNDERSTAND

1. **Explain** how karst landscapes are formed.
   a. Chemical reaction
   b. Transportation
   c. Uplift
   d. All of the above
2. Karst topography makes up about _____ per cent of the Earth's surface.
3. **Identify** two reasons why karst landscapes should be preserved.
   a. They are important because of their natural beauty.
   b. 25 per cent of the world's population depends on karst aquifers as a water supply.
   c. 90 per cent of the world's tourist attractions are found in karst landscapes.
   d. 99 per cent of the world's population depends on karst aquifers as a water supply.
4. Karst landscapes are found underground. **Identify** evidence on the surface of the Earth that might indicate the existence of a karst landscape.
5. **Describe** the global distribution of karst landscapes.

ANALYSE AND APPLY

6. The world's largest limestone karst system is found on the Nullarbor Plain, Australia.
   a. The Nullarbor Plain is an example of a desert landscape. **Propose** how an environment formed by water can occur in this location.
   b. **Describe** how you think this landscape would be different if it was located in Australia's tropical north.
7. **Explain** how the karst landscape can provide us with a link to our distant past.
8. **Explain** how the karst landscape can provide a quarter of the world's population with water.

EVALUATE AND COMMUNICATE

9. Karst is often described as a 'hidden landscape'. **Identify** reasons for this description.
10. **Propose** a reason for the absence of 'discovered' karst landscapes in Antarctica.

Answers and sample responses for this topic are available online.

LESSON 13.10 The cultural and spiritual significance of landscapes

LEARNING INTENTION

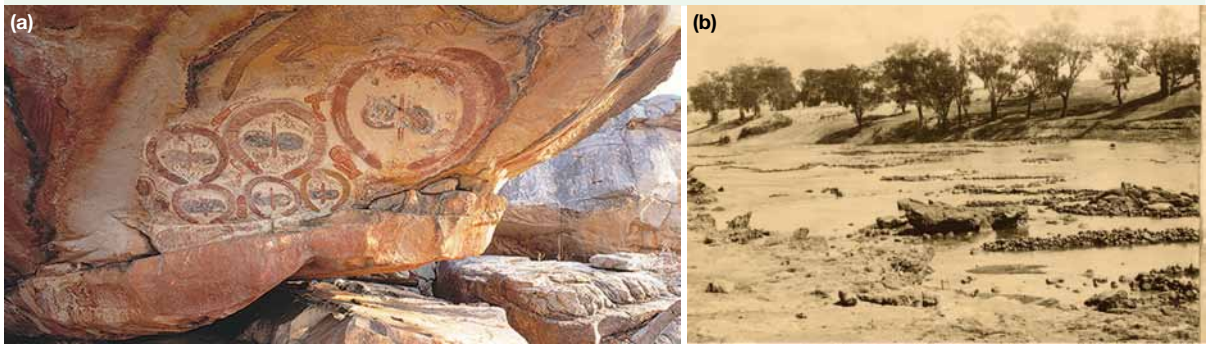
By the end of this lesson you should be able to:

- **explain** the cultural significance of landscapes to Aboriginal and Torres Strait Islander Peoples
- **describe** the lifestyle of Aboriginal and Torres Strait Islander Peoples in coastal areas
- **explain** how coastal landscapes are managed by Aboriginal and Torres Strait Islander Peoples.

Tune in

Aboriginal and Torres Strait Islander Peoples are recognised as the first Australians. Evidence of their presence in Australia is found across the continent: in archaeological records, historical photographs and cultural heritage that has been passed down through the generations.

FIGURE 1 Evidence from the past **(a)** A rock painting depicting a cloud or rain spirit was found in Western Australia's Kimberley Region. **(b)** A photograph of a fish trap used by Aboriginal People on the Barwon River, NSW, in the late 1800s.



1. **How old do you think the rock art in FIGURE 1a might be?**
2. **What element of Aboriginal culture do you think is depicted in the rock art in FIGURE 1a?**
3. **How do you think the trap in FIGURE 1b functioned?**
4. **Why is it unlikely for us to find many traps like these remaining today?**

13.10.1 The Australian context

Landscapes are the product of processes that have operated for millions of years. Aboriginal and Torres Strait Islander Peoples of Australia have a deep understanding of the complex nature of Australia's varying landscape. They have always nurtured the land, working alongside nature rather than always seeking to change or exploit it.

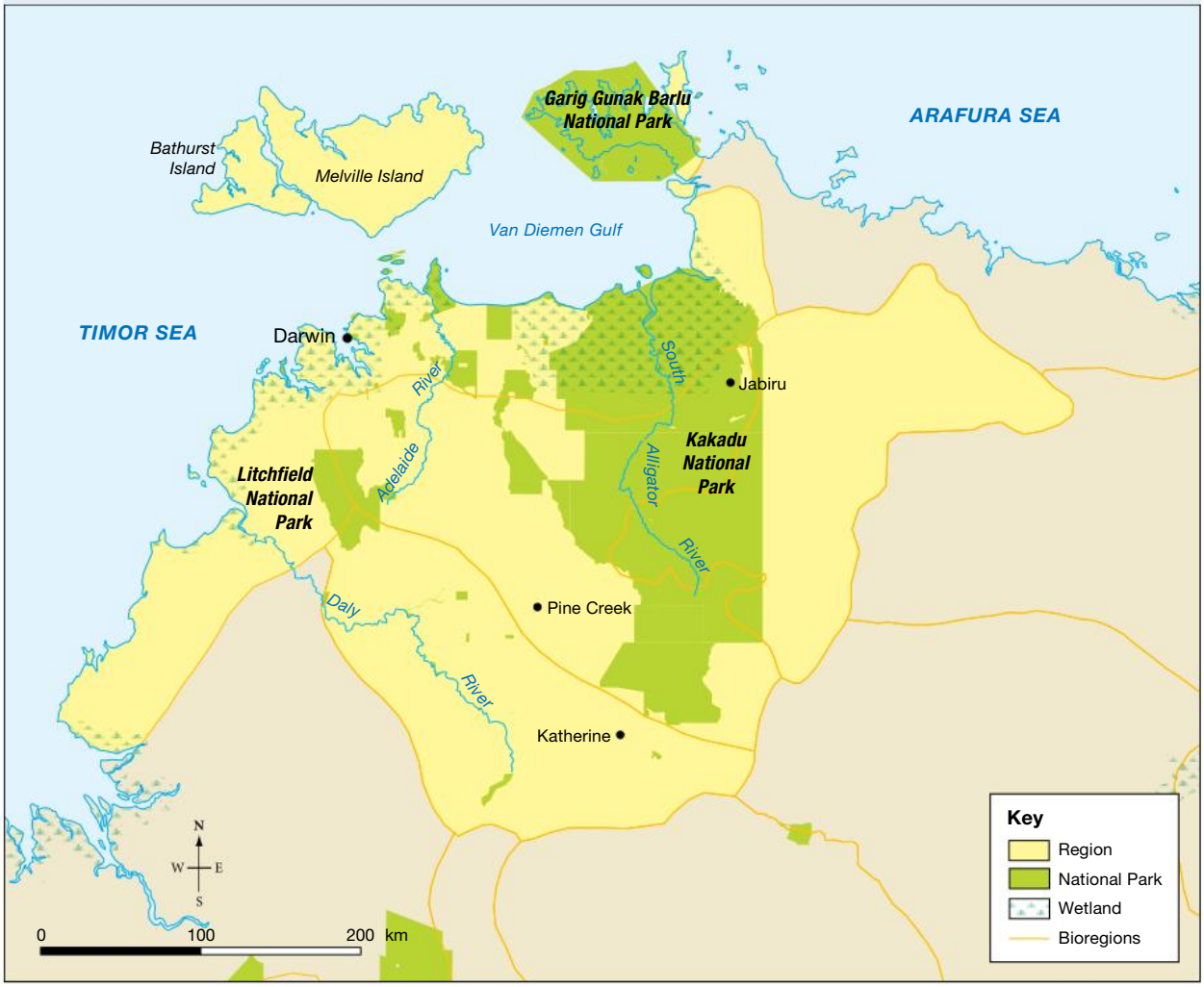
European settlers who arrived in 1788, on the other hand, brought with them the concept of land ownership. They sought to change and adapt the landscape to meet their needs, often exploiting it for immediate benefits.

The perspective of Aboriginal and Torres Strait Islander Peoples of Australia is one of belonging to the landscape, while the European perspective is based on the idea of owning land.

13.10.2 Kakadu – Australia's first World Heritage area

Kakadu National Park (**FIGURE 2**) covers approximately 20 000 square kilometres of the Northern Territory — about one-third the size of Tasmania. It stretches 200 kilometres from north to south and spans 100 kilometres from east to west. Within the park's boundaries are vast uranium deposits. Kakadu is recognised for its natural beauty and both its environmental and cultural significance.

FIGURE 2 Map of Kakadu National Park



Source: Spatial Vision

SkillBuilder discussion

1. **FIGURE 2** shows the distribution of wetlands. List the features of a wetland.
2. Discuss why wetlands and bioregions are important and are sometimes protected as National Parks.

SkillBuilder discussion

Concluding and decision-making

1. Explain why Kakadu is considered both environmentally and culturally significant.
2. Other than mining, why might there have been little development in the Kakadu region?
3. Do you think uranium mining should be permitted in this type of landscape?

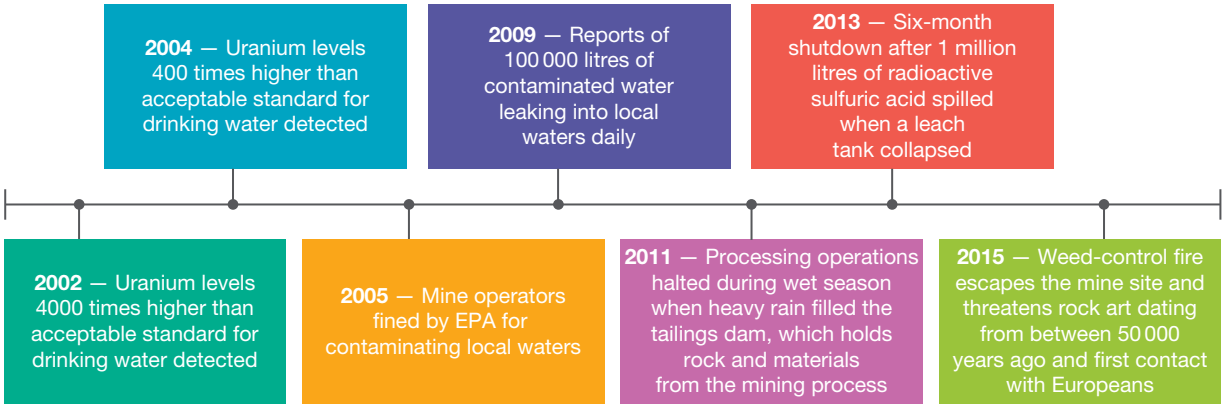
Jim Jim Falls, Kakadu, Northern Territory, Australia

13.10.3 Kakadu and its resources

Kakadu National Park, a UNESCO World Heritage site, is renowned for its cultural and natural significance, drawing over 200 000 visitors annually. It features 20 000-year-old rock art by the Bininj/Mungguy people, whose connection spans 65 000 years. The park boasts diverse flora, fauna, wetlands, gorges and waterfalls.

Kakadu's uranium deposits, while economically significant, have raised environmental and health concerns, including higher stillbirth and cancer rates among nearby Aboriginal communities. The Ranger uranium mine, active since 1980, ceased mining in 2012, with ore processing ending in 2021. Rehabilitation, projected to cost over $2.4 billion, is expected to conclude by 2028.

FIGURE 3 Timeline of major breaches at the Ranger uranium mine



13.10.4 How did Aboriginal and Torres Strait Islander Australians use coastal environments?

Aboriginal and Torres Strait Islander Peoples have lived in coastal environments for at least 65 000 years, managing both their resources and the environment. Despite changes to Australia's coasts, archaeological evidence of these practices remains.

Thousands of **shell middens** are scattered across coastal environments, providing an insight into how Aboriginal and Torres Strait Islander Peoples lived. Carbon dating is used to determine the age of these shell middens. Victoria's oldest shell midden, located at Cape Bridgewater, is more than 12 000 years old.

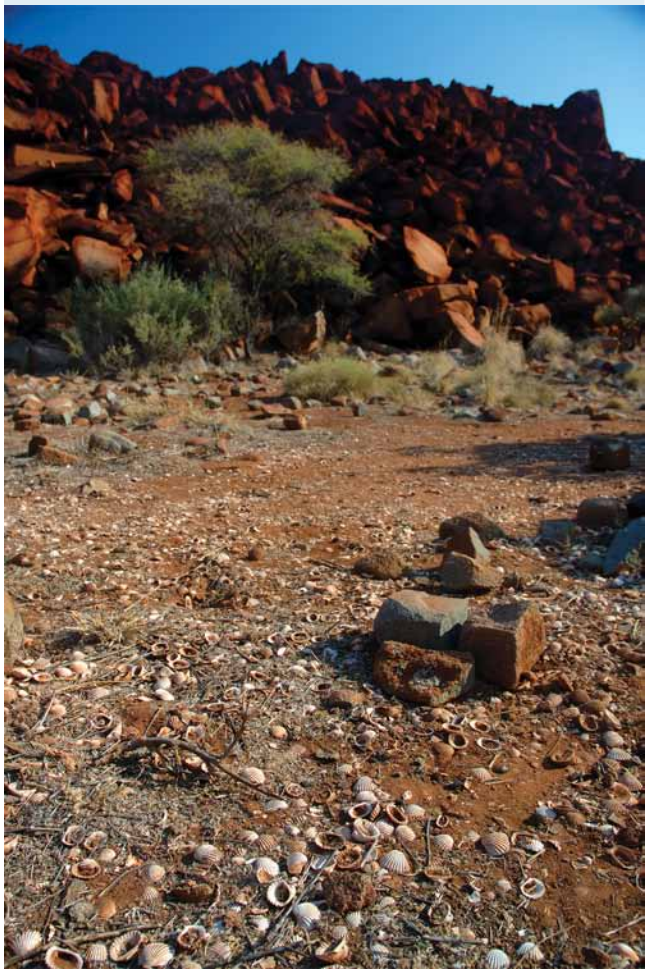
These middens, typically found in scrublands behind dunes, contain remains of shellfish, bones, stone tools, ash and charcoal, suggesting food storage and cooking. They serve as tangible links to history and culture, particularly where other heritage evidence is scarce. These are fragile sites in dynamic locations, so protecting their historical and cultural significance is essential.

SkillBuilder discussion

Geographical inquiry

1. Look at **FIGURE 4**. What can you see in this shell midden?
2. What does this suggest about the diet of the people who lived here thousands of years ago?

FIGURE 4 Shell midden on the Tarkine coast, Tasmania



13.10 SkillBuilder activity **GEOGRAPHICAL INQUIRY**

Shell middens are one example of a Aboriginal and Torres Strait Islander archaeological site. Use the Internet to find another example of Aboriginal and Torres Strait Islander archaeological site in Australia. **Identify** and **describe** the site and **explain** why it is historically and culturally significant.

13.10 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5, 6, 7	8, 9, 10

REMEMBER AND UNDERSTAND

1. Refer to the information on Kakadu National Park.
   a. **Identify** the location of Kakadu National Park.
      i. Northern Territory
      ii. New South Wales
      iii. Queensland
      iv. Western Australia
   b. **Select** the option that best explains why Kakadu National Park is important.
      i. Most Australians source water from there.
      ii. It has cultural significance.
      iii. Most Australians source fish from there.
      iv. It is not important.
2. **Consider** the Australian landscape and **outline** the differences between the way it is viewed by Aboriginal and Torres Strait Islander Peoples and non-Indigenous Australians.
3. **Identify** whether the following statements are True or False.
   a. Aboriginal and Torres Strait Islander Peoples see the land as something to farm and develop, whereas the European tradition is that people are custodians of the land.
   b. Aboriginal and Torres Strait Islander Peoples look after the land as a community, whereas the European tradition is that people live on and own one specific piece of land.
   c. Aboriginal and Torres Strait Islander exploited the land, whereas the European tradition involved careful management of the land and its resources.
4. **Identify** the more densely populated regions of Australia.
   a. Coastal regions
   b. Inland regions
   c. Population is evenly distributed across Australia.
   d. Forest regions
5. **Select** the correct terms in the following sentence: Victoria's oldest shell midden is located at **Tarkine / Cape Bridgewater** and is over **12 000 / 20 000 / 32 000** years old.
6. **Explain** what evidence there is in shell middens that suggests Aboriginal and Torres Strait Islander Peoples cooked their food.
   a. Cutlery marks on shells
   b. Charcoal and ash found around the middens
   c. Cooking utensils found among the shells
   d. All of the above

ANALYSE AND APPLY

7. Answer the following questions.
   a. **Explain** what a shell midden is.
   b. **Explain** why shell middens are important to preserve.
8. Answer the following questions.
   a. Most shell middens are found within a few kilometres of the coastline. **Explain** why this location would make these sites vulnerable.
   b. **Suggest** a way that we could protect and preserve shell middens.
   c. **Suggest** how shell middens could be used to boost tourism in regional areas.
9. **Explain** how we have such an extensive knowledge of Bininj and Mungguy peoples' culture, history and beliefs.

EVALUATE AND COMMUNICATE

10. **Consider** the resources in the Kakadu region.
    a. **Explain** what uranium is used for and why it is considered a valuable resource.
    b. **Explain** the risks posed by uranium mining in the Kakadu region.
    c. **Predict** three possible impacts on the landscape if a new uranium mine was opened in the Kakadu region.
    d. **Propose** one argument for and one argument against granting leases to mine resources such as uranium in the Kakadu region.
11. Some middens have been found far from current coastal areas. **Suggest** how this is possible.

Answers and sample responses for this topic are available online.

LESSON 13.11 How can we manage and preserve landscapes?

LEARNING INTENTION

By the end of this lesson you should be able to **understand** the human causes of landform change and ways of managing it.

Tune in

Did you know that Australia's Gondwana Rainforest is made up of 50 separate reserves and national parks comprising 366 000 hectares of remnant rainforest across Queensland and New South Wales? Within these rainforests are fossil records dating back to the supercontinent Gondwanaland. It is on the World Heritage List because it has high conservation value for both its natural beauty and cultural significance.

FIGURE 1 Crystal Falls in Australia's Gondwana Rainforest

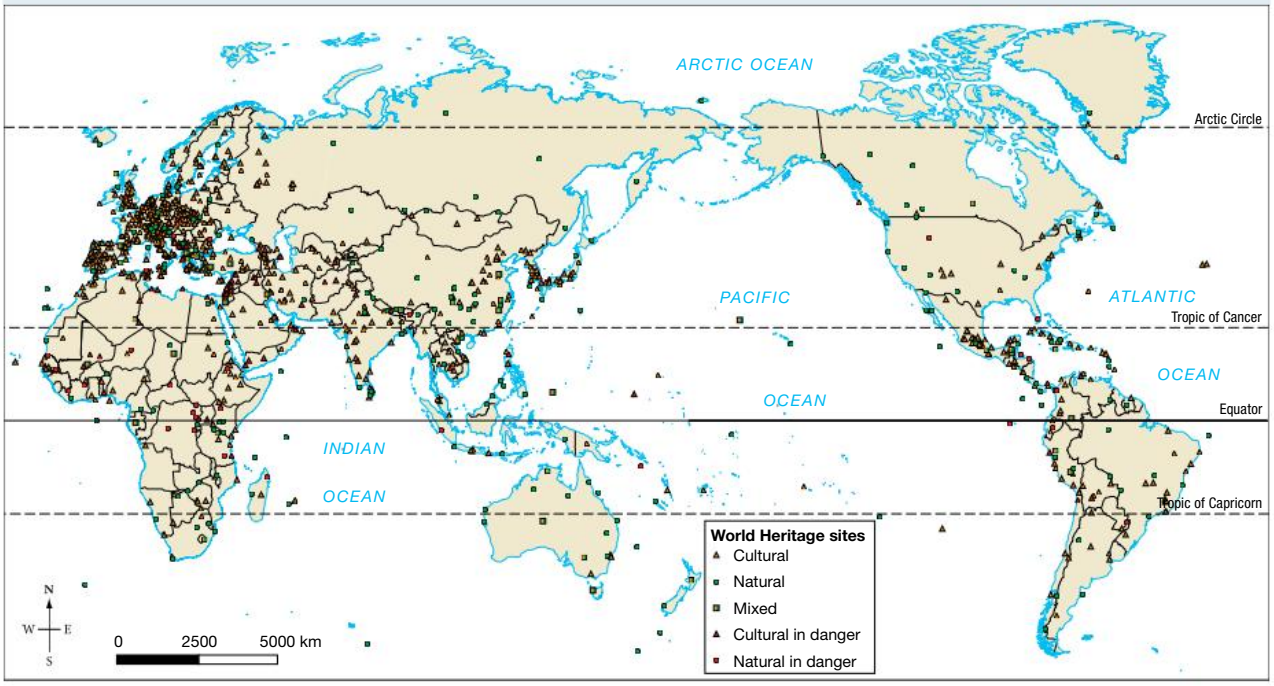
1. **What do you understand by the concept of World Heritage List?**
2. **Why do you think the Gondwana Rainforest comprises so many reserves and national parks?**
3. **Brainstorm a list of the types of evidence from Australia's past that might be found in the Gondwana Rainforest.**
4. **Have a class discussion about whether the Gondwana Rainforest should be preserved.**

13.11.1 Human causes of landform change

Human activities like mining, farming, building roads and cities, and deforestation can radically change the shape of the land by removing soil, flattening hills, or causing erosion, far faster than natural processes would.

The UNESCO World Heritage Centre actively works to protect World Heritage listed sites from human-induced change. Landforms not on the World Heritage list are often managed by other organisations such as national and state parks services, local councils, Aboriginal and Torres Strait Islander Peoples' land councils, and environmental agencies to help protect their natural and cultural resources.

FIGURE 2 The World Heritage List includes 1223 sites of significance across 168 countries. There are 952 cultural sites, 231 natural sites and 40 mixed sites.



Source: Copyright © 1992–2019 UNESCO/World Heritage Centre. All rights reserved.

SkillBuilder discussion

Geographical inquiry

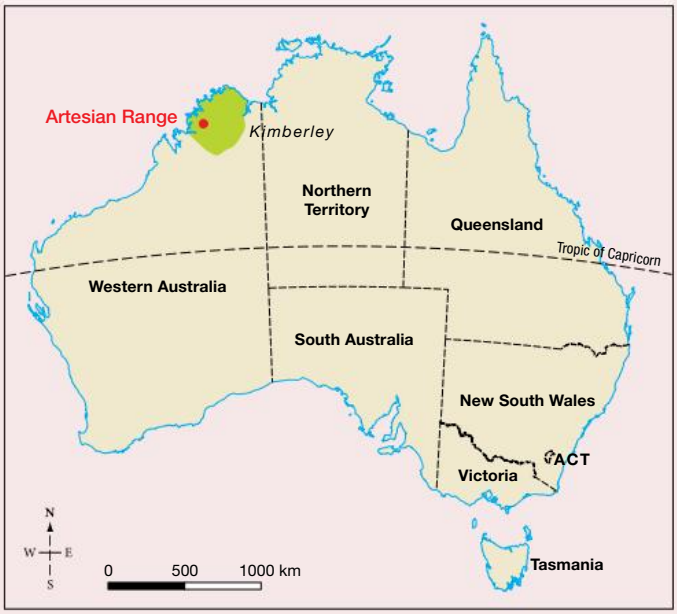
1. Which continents have the highest concentration of World Heritage sites?
2. Discuss how World Heritage sites contribute to tourism.
3. Do you think tourism is beneficial or does it put these sites at risk?

CASE STUDY
The Great Artesian Range

The Artesian Range, an isolated and unique Australian landscape, is often called a modern-day Noah's Ark. Its hidden valleys and canyons are home to diverse flora and fauna, including some of Australia's most endangered species. Covering 1800 square kilometres (**FIGURE 3**), the area is largely inaccessible and can only be reached by helicopter or boat. The sandstone formations date back around 1.8 million years.

Despite its remoteness, the Artesian Range faces threats from invasive species like donkeys, horses, pigs and cats, as well as changing fire patterns and increased wildfires. The Australian Wildlife Conservancy (AWC), a non-profit funded by donations, manages the area for conservation through fire management, feral animal control and biological surveys.

FIGURE 3 The Artesian Range covers 1800 square kilometres of the Kimberley region.



Source: Spatial Vision

FIGURE 4 The Artesian Range is a rugged and largely incredible landscape, renowned for its natural beauty and unique wildlife.

13.11.2 How can a coast be managed?

Understanding physical processes and human activities is key to reducing changes to coastal landscapes. While we can't change natural forces like wind or waves, we can manage sand movement and use barriers to protect infrastructure.

Coastal management involves hard engineering (such as building sea walls and groynes) and soft engineering approaches. Hard engineering can sometimes cause further issues, as seen in Seabird, Western Australia, where a sea wall stopped sand replenishment and led to beach loss.

Soft engineering, such as dune revegetation by the Shire of Gingin, offers more sustainable solutions. Planting grasses and shrubs stabilises dunes by binding sand, which prevents erosion.

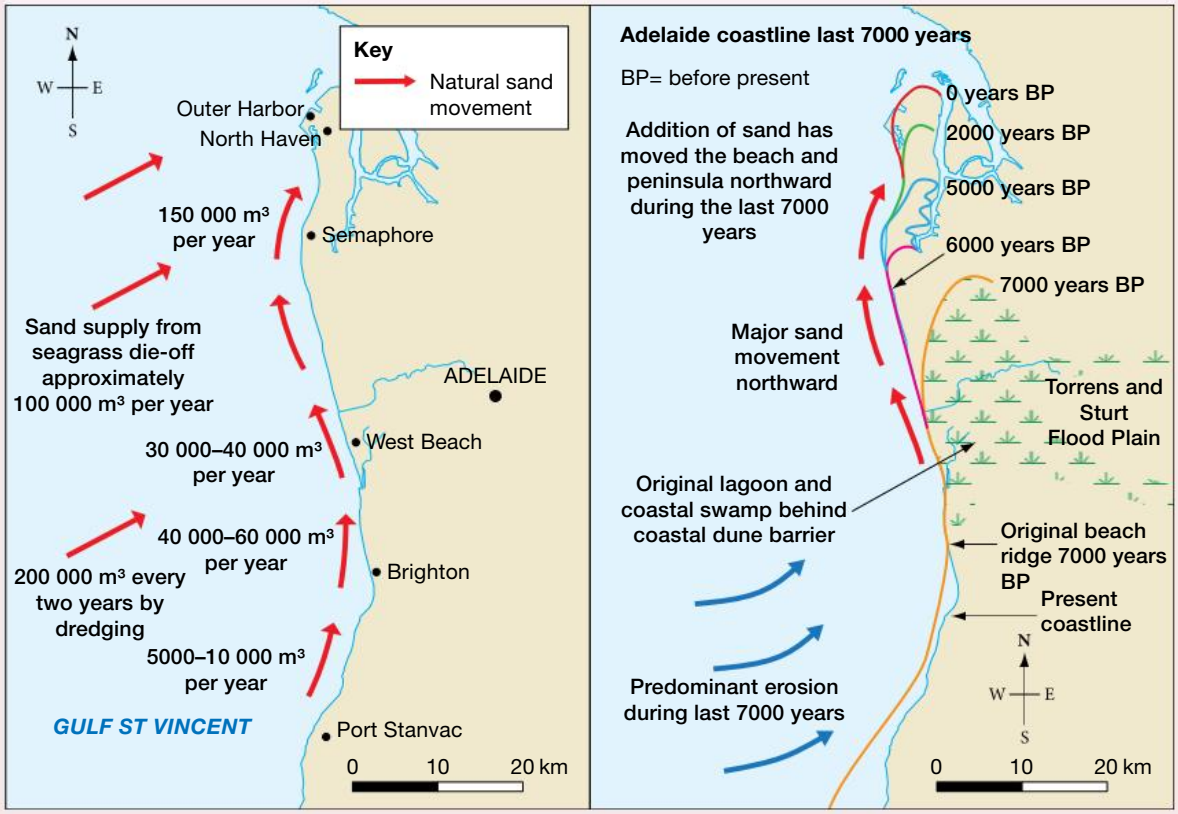
CASE STUDY

Managing Adelaide's living beaches

The problem: Adelaide's sandy beaches face constant erosion (**FIGURE 5**). For 7000 years, south Adelaide's beaches have eroded, with south-west winds driving the material northwards.

This longshore drift has formed a peninsula and dune system in North Haven. For 30 years, sand has been trucked in to replenish southern beaches. The goal is to find a more cost-effective way to manage Adelaide's beaches.

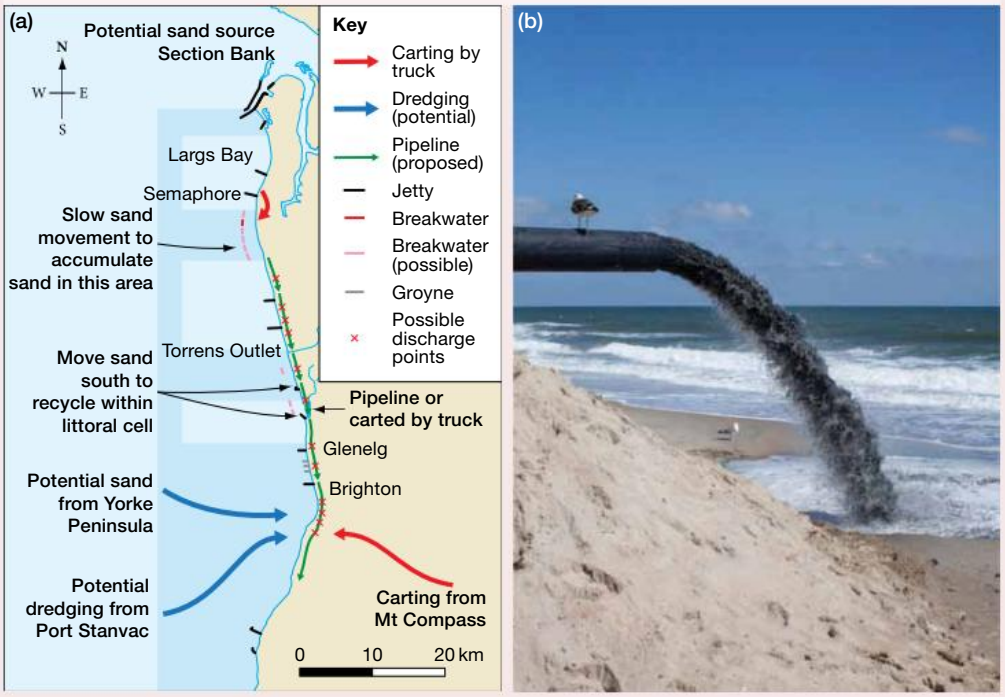
FIGURE 5 The movement of sand northwards along the Adelaide Metropolitan coastline



Source: Spatial Vision

The solution: Adelaide's Living Beaches Strategy (**FIGURE 6**) involves recycling sand from north to south using a pipeline instead of trucks to transport the sand. The pipeline will extend along the coast, sending sand to the southern end of the beach (**FIGURE 6b**). Structures like breakwaters and groynes will be built to trap sand at key locations, further reducing the need for trucks and lowering beach restoration costs.

FIGURE 6 **(a)** Adelaide's Living Beaches Strategy **(b)** Piping sand from north to south along Adelaide's beaches



Source: Spatial Vision

SkillBuilder discussion

Geographical inquiry

1. Identify and classify the management strategies shown in **FIGURE 6 a**.
2. What would happen if sand was not moved from one end of the beach to the other?
3. Suggest a reason for the discharged sand appearing to be black.
4. Discuss whether this strategy will have a positive or negative impact on the beach environment.

13.11.3 Do coastal management strategies work?

An integrated strategy like Adelaide's Living Beaches Strategy has a better chance of protecting coastal landscapes and nearby structures, because it considers prevailing wind conditions and sand movement.

Building structures like groynes (**FIGURE 7**) on a beach can trap sand, but this disrupts longshore drift, and this can also reduce sand flow to beaches further along the coast. Sea walls or breakwaters may interrupt longshore drift, causing silt build-up at harbour mouths and increasing erosion on unprotected nearby coasts. Additionally, sea walls can reduce erosion from cliffs that naturally replenish beach sand.

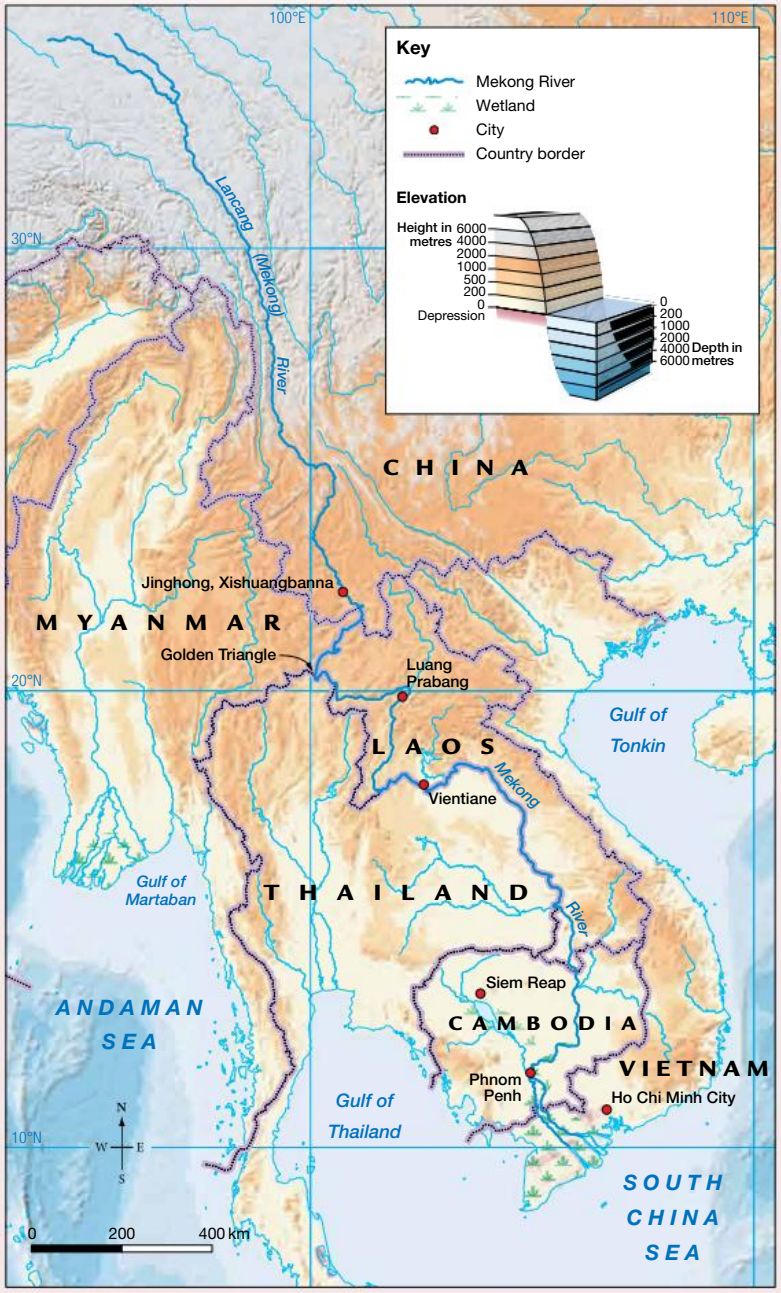
Coastal management is challenging: should we protect existing landscapes or allow wind and wave actions to create naturally evolving ones?

FIGURE 7 A groyne on Cottesloe Beach

CASE STUDY
Managing the Mekong River

Following the Mekong River from the Tibetan Plateau to southern Vietnam, you journey through six South-East Asian countries. The Mekong, the world's twelfth-longest river and Asia's third-longest, serves as a vital trade route and provides essential irrigation for agriculture, despite its navigation challenges.

FIGURE 8 The Mekong River winds its way through six South-East Asian countries, ending in the Mekong Delta in Vietnam.



Source: Based on data from Natural Earth and ETOPO1: doi:10.7289/V5C8276M. Map drawn by Spatial Vision.

The importance of the river

The Mekong is a vital economic and environmental asset:

- It enables the transportation of goods between and within countries.
- It supplies cities and communities with water for agricultural activity and household use.
- Parts of the river are used for the production of hydroelectric power.
- It is the second most biodiverse river in the world, sustaining important fishing industries.

FIGURE 9 Floating markets of Soc Trang in the Mekong Delta

SkillBuilder discussion

Concluding and decision-making

1. What is a delta?
2. Discuss why floating markets are important in the cultural life of the region.
3. What challenges might people face in a floating market environment?

Floods

Flooding is common along the Mekong River, especially affecting Vietnam's Mekong Delta. While seasonal flooding is part of life, extreme floods can be devastating. In 2020, severe weather led to a major flood that caused over 100 deaths, damaged more than 200 000 homes, and affected around 850 000 livestock. Thousands of hectares of farmland were also impacted.

Living on a floodplain has both benefits and drawbacks. The Mekong River Commission estimates that the annual value of floodwaters is between US$8 billion and US$10 billion, but the cost of flooding events averages US$60 to 70 million per year. Despite the economic benefit, the human toll of flooding must be considered.

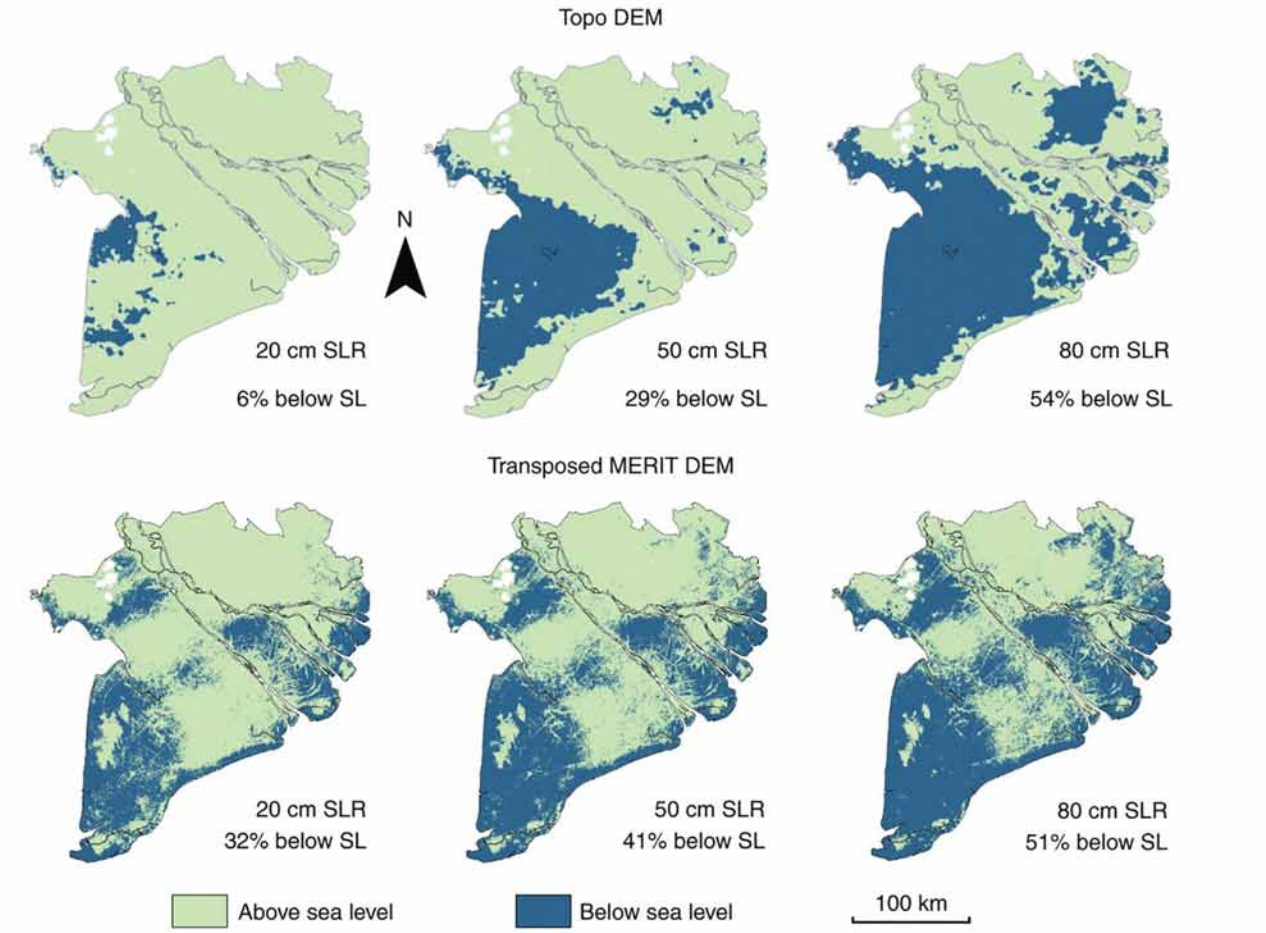
River management

The Mekong River crosses multiple international boundaries, making its management complex. Each country has distinct priorities such as irrigation, damming and flood control. Upstream countries often focus on hydroelectricity, while downstream countries prioritise irrigation. These differing interests require international cooperation or assistance from independent organisations for effective river management.

Management issues

- Transboundary rivers require complex inter-governmental management.
- Seasonal flooding creates consistent issues.
- There is increased frequency and severity of extreme weather events.
- The Mekong Delta has high population density (20 per cent of Vietnam's population lives this region).
- There is increasing use of dams in multiple countries along the Mekong's upper and middle courses.

FIGURE 10 This series of maps shows the potential impacts of sea-level rise on the Mekong Delta.



SkillBuilder discussion

Geographical inquiry

1. How does sea-level rise affect coastal areas?
2. Do you think sea-level rise poses a risk to health and freshwater supplies of people in coastal areas? Explain.
3. What measures can communities take to lessen the impacts of sea-level rise?

13.11 SkillBuilder activity CONCLUDING AND DECISION-MAKING

Imagine that you own a holiday house that is built on coastal dunes within 15 metres of the beach. After a powerful storm, the beach in front of your house is eroded and your house is now only 5 metres from the sea. What are your options?

Propose a series of strategies that you could implement which may save your house from falling into the sea. Include diagrams to **illustrate** your plan.

13.11 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 6	3, 4, 5, 8	7, 9, 10

REMEMBER AND UNDERSTAND

1. Answer the following:
   a. **Identify** where in Australia the Artesian Range is located.
      i. North-east coast of Australia
      ii. North-west coast of Australia
      iii. South-west coast of Australia
      iv. South-east coast of Australia
   b. **Explain** why the Artesian Range has been largely inaccessible to people.
      i. Steep escarpments
      ii. Thick forests
      iii. There are no roads leading into the area
      iv. All of the above
   c. **Identify** two management strategies used by the Australian Wildlife Conservatory (AWC) to manage and conserve the Artesian Range.
      i. Increasing tourist numbers
      ii. Fire management
      iii. Native animal control
      iv. Biological survey
      v. Diverting water for public use
2. Answer the following:
   a. **Explain** how groynes help to manage or protect a coastal landscape.
      i. They trap sand moving along the beach.
      ii. They assist in the movement of sand along the beach.
      iii. They help longshore drift.
      iv. They stop destructive waves from pounding the beach.
   b. **Explain** how seawalls help to manage and protect the coastal landscape. Select all correct answers.
      i. They protect the coastline from destructive waves.
      ii. They help anchor sand on the beach.
      iii. They prevent longshore drift.
      iv. They prevent structures such as cliffs and roads being undercut.

3. Answer the following:
   a. **Identify** the six countries through which the Mekong River flows.
      i. China
      ii. Myanmar
      iii. India
      iv. Thailand
      v. Bangladesh
      vi. Cambodia
      vii. Laos
      viii. Vietnam
      ix. Indonesia
   b. **Determine** whether the following statements are True or False.
      i. A transboundary river flows through only one country.
      ii. Floods in the Mekong Delta always have a positive impact on the region's economy.
      iii. The Mekong River is the second most biodiverse river in the world.
4. Answer the following questions.
   a. **Describe** one situation in which you would use a hard management technique instead of a soft management technique.
   b. **Describe** one situation in which you would use a soft management technique instead of a hard management technique.
5. **Explain** why it is important to protect sites that have cultural or natural significance.

ANALYSE AND APPLY

6. **Explain** why flooding is a common occurrence along the Mekong River.
7. Answer the following questions.
   a. Refer to **FIGURE 7** and **describe** the direction of longshore drift in the image.
   b. Refer to **FIGURES 5** and **6**. **Describe** the changes the Living Beaches Strategy has made to the Adelaide coastline and the reason for these changes.
   c. **Describe** what will happen to Adelaide's southern beaches if they stop being replenished with piped or trucked sand.

EVALUATE AND COMMUNICATE

8. The Artesian Range has been described as a 'modern-day Noah's Ark'. **Explain** what you understand by this description.
9. **Describe** the processes that have led to the formation of the Artesian Range and its different landscape features.
10. The impact of flooding on residents of the Mekong Delta region could be avoided by relocating communities to other parts of Vietnam. **Identify** and **explain** two issues with this strategy.

Answers and sample responses for this topic are available online.

LESSON 13.12 Investigating topographic maps

LEARNING INTENTION

By the end of this lesson you should be able to locate and **describe** the features of the Daintree Rainforest on a topographic map.

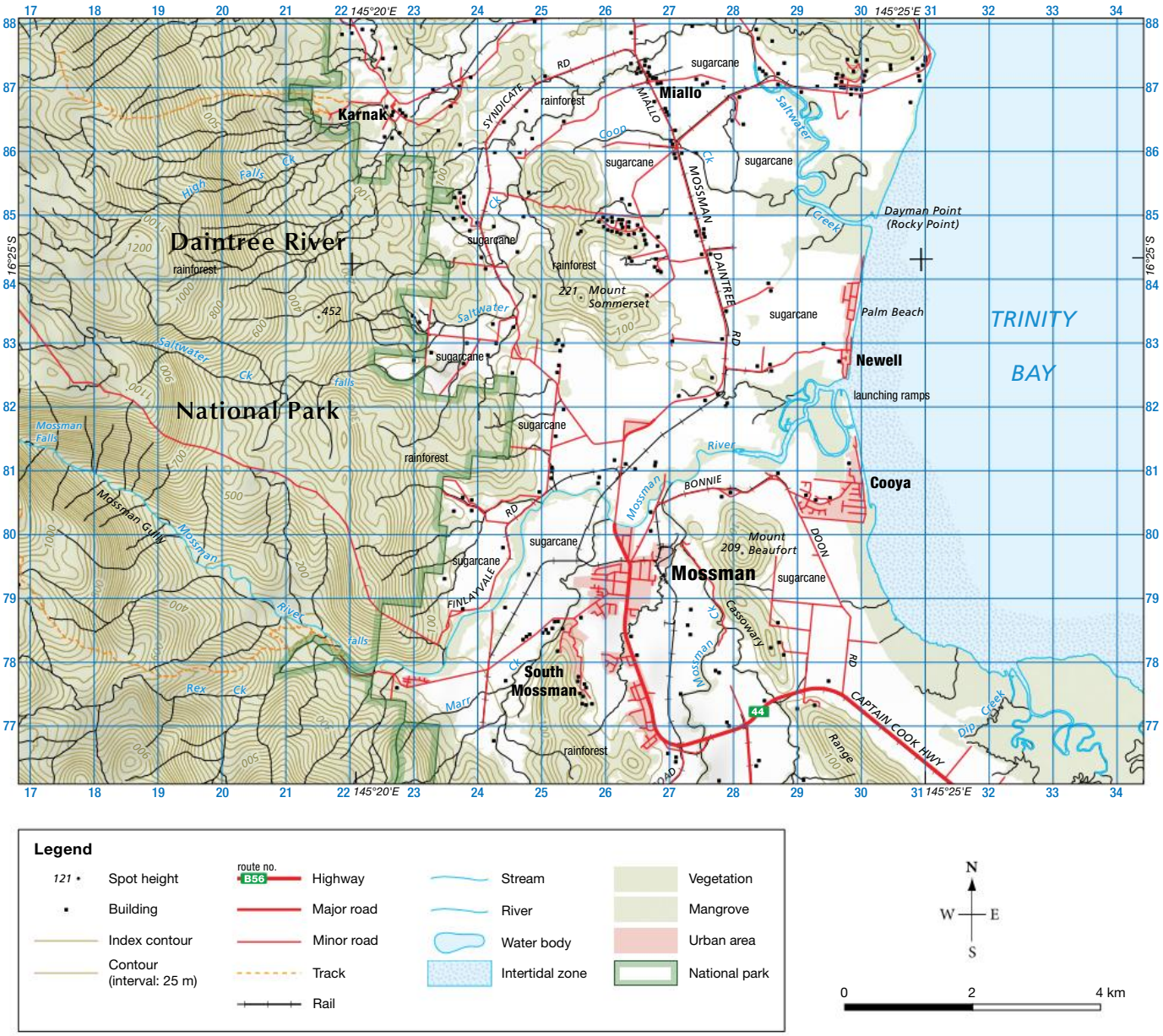
13.12.1 Daintree Rainforest

The Daintree Rainforest, located in the Daintree National Park in Far North Queensland, is one of the oldest surviving rainforests on Earth. It holds such significance to the biological diversity and geological history of Australia that it was recognised as a World Heritage area in 1988.

This area forms part of the Wet Tropics of Queensland, which stretch along the north-east coast of Australia for 450 kilometres.

FIGURE 1 The Daintree area of northern Queensland **(a)** A mangrove on the mudflats of Cooya Beach **(b)** Newell Beach **(c)** Mussman Gorge

FIGURE 2 Topographic map extract of the south-eastern section of the Daintree River National Park



Source: Map redrawn by Spatial vision, based on information taken from QSpatial, State of Queensland (Department of Natural Resources, Mines and Energy, Department of Environment and Science), http://qldspatial.information.qld.gov.au/catalogue/

FIGURE 3 The Mossman River winds through the Daintree Rainforest

13.12 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 4	2, 5	3, 6

REMEMBER AND UNDERSTAND

1. According to **FIGURE 2**, the most common type of farming to occur in the area is _____.
2. **Identify** the features found at the following locations.
   a. GR262792
   b. GR332775
   c. GR311788
   d. GR307760
3. **Describe** what the landscape would look like if you were at the following locations.
   a. GR195768
   b. GR335765
   c. GR272867
4. **Identify** the six-figure grid references for:
   a. Dayman Point
   b. Port of Mossman
   c. Miallo.
5. **Identify** which features shown on the map provide evidence that this is a rainforest landscape.
6. **Explain** three ways that humans have had an impact on this rainforest environment.

Answers and sample responses for this topic are available online.

LESSON 13.13 Inquiry: Coastal environment case study

LEARNING INTENTION

By the end of this lesson you should be able to **describe** coastal processes, threats and the management strategies of a particular coastal environment.

Background

For this inquiry, you will **investigate** and **evaluate** coastal processes and management strategies at a coastal location of your choosing. You can choose a coastal environment which is close to your home or perhaps one which you've visited before on a holiday. Use these steps to complete your inquiry activity.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching using geographical methods

Choose any coastal environment to use as your case study. **Conduct research** on this location using these questions to guide your investigation:

- Where is your chosen location?
- What are the dominant coastal processes that occur at your location?
- **Describe** the extent of human activity at your location.
- **Identify** any existing or potential issues that could be caused by the observed coastal processes or by human activity.
- **Identify** any existing management strategies that are currently being used in your location.

Step 2: Interpreting and analysing geographical data and information

For this section, you will need to use your research data and your knowledge of the relationship between coastal processes and management strategies.

If there are management strategies being used at your location, **determine** the effectiveness of these strategies. In other words, have the strategies been successful? If so, what evidence supports your observations?

Step 3: Concluding and decision-making

If the existing management strategies have been unsuccessful, what strategies could potentially be used at your location to solve the issues which you have previously identified? **Consider** both hard and soft management techniques as possible solutions. **Explain** which strategies you would use and what impacts you would hope to see in the future.

Step 4: Communicating

Prepare a report about your chosen location, its coastal processes and threats, as well as existing coastal management strategies to mitigate these threats. The report can be in any appropriate format, such as a written report, slide show or video, and should include visual information such as photographs and maps. The report should also evaluate the effectiveness of the existing management strategies.

LESSON 13.14 Review

13.14.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

13.2 Why do landscapes vary?

- Landscapes are shaped by factors such as climate, geographical features and latitude.
- The type of landscape that develops is determined by the mix of these factors.
- There are variations within landscapes, and they are impacted by human activity.

13.3 How are landscapes created?

- Landscapes are continually changing; tectonic forces build landscapes.
- Erosion, deposition and weathering change landscapes.
- The rate of change varies in landscapes formed by water.
- Human activity such as deforestation accelerates erosion.
- Soil types vary and determine the vegetation a landscape can support.
- Coastal environments share similarities and differences in both landforms and the processes that form them.

13.4 Coastal landscapes: the role of erosion and deposition

- The coast is the zone between land and sea. Physical processes determine the physical characteristics of the landscape.
- Waves are created when the wind blows over the ocean; wave size is determined by wind strength and distance travelled.
- Constructive waves create depositional landforms such as beaches, spits and lagoons.
- Destructive waves create erosional landforms such as caves, arches and stacks.
- Longshore drift moves sand along a beach in the direction of the prevailing winds.

13.5 How do rivers shape landscapes?

- Rivers sculpt landscapes though erosion, transportation and deposition.
- Rivers can be perennial (with consistent flow all year) or intermittent (with inconsistent flow).
- Rivers consist of three sections — upper, middle and lower. Different processes and landforms are found in each section.

13.6 Australian landforms

- Australia is an ancient landscape that has undergone many changes over millions of years.
- Tectonic forces have uplifted the land, creating mountain ranges.
- Weathering, erosion and deposition have worn away and sculpted the landscape.
- Climate and vegetation are also different to those found millions of years ago.

13.7 Rainforests and grasslands

- Grasslands are transitional landscapes, generally located between forests and deserts.
- African savanna grasslands are maintained by grazing animals and their migration.
- Aboriginal communities use fire to maintain grasslands in northern Australia.
- Rainforests are areas of extremely high rainfall and are located in the tropical zone.
- Rainforests regulate global climate, produce oxygen and are the source of many foods and medicines.
- Rainforests are under threat due to exploitation and over-harvesting of resources.

13.8 Deserts in Australia and China

- Deserts can be hot or cold, and are characterised by low rainfall.
- Approximately one-third of the Earth's surface is classified as arid or semi-arid.
- Latitude and topography play a role in determining where deserts are located.

13.9 What are underground landscpaes?

- Karst landscapes are found all over the world, predominantly in tropical regions.
- Karst forms where slightly acidic water filters through soluble bedrock, such as limestone, creating underground hollows and caves.
- The largest arid limestone karst cave system is located on Australia's Nullarbor Plain.

13.10 The cultural and spiritual significance of landscapes

- Aboriginal and Torres Strait Islander Peoples of Australia have been in Australia for over 65 000 years and have a close connection to the land.
- The Australian landscape is culturally significant to Aboriginal and Torres Strait Islander Peoples and their beliefs regarding the land conflicted with those of European settlers.
- Shell middens provide archaeological evidence of Aboriginal and Torres Strait Islander Peoples' activity in coastal environments and a physical link to their culture and history.

13.11 How do we manage and preserve landscapes?

- The World Heritage List preserves places of natural and cultural significance for future generations.
- Australia's Artesian Range is one example of a natural and culturally significant site in Australia.
- The inaccessible nature of the Artesian Range has protected it from human activity; however, it is threatened by introduced species.
- Coastal regions use hard and soft engineering strategies.
- Multiple strategies that take account of natural processes are needed to manage coastal environments.
- People rely on rivers for agricultural, industrial, commercial, residential and recreational purposes.
- Proper management is essential due to the human demands on rivers.

13.12 Investigating topographic maps

- The Daintree Rainforest is located in Far North Queensland.
- The Daintree is a significant region, a national park with World Heritage status.

13.13 Inquiry: Coastal environment case study

- Many coastal locations use strategies to manage coastal processes with varying levels of effectiveness.

13.14.2 Key terms

aquifer a body of permeable rock below the Earth's surface that contains water, known as groundwater
backwash the movement of water from a broken wave as it runs down a beach returning to the ocean
billabong a U-shaped body of water created when a wide meander is cut off from the main channel of a river after it changes its course. Also known as an oxbow lake.
compost a mixture of various types of decaying organic matter such as dung and dead leaves
constructive waves waves that deposit sand on the beach
convection currents currents created when a fluid is heated, making it less dense and causing it to rise through surrounding fluid and sink if it is cooled; a steady source of heat can start a continuous current flow
cuspate spits projections of a beach into an enclosed or semi-enclosed lagoon
deposition the laying down of material carried by rivers, wind, ice and ocean currents
destructive wave a large powerful storm wave that has a strong backwash
downstream nearer the mouth of a river, or going in the same direction as the current
drainage basin an area of land that feeds a river with water, or the whole area of land that is drained by a river and its tributaries
ecosystem an interconnected community of plants, animals and other organisms
erosion the wearing away and removal of soil and rock by natural elements, such as wind and water, and by human activity
escarpment a steep slope or cliff formed by erosion or vertical movement of the Earth's crust along a fault line
estuary the wide part of a river at the place where it joins the sea

fetch the distance over which the wind blows across the surface of water. A long fetch results in larger, more powerful waves, whereas a short fetch results in smaller waves.
floodplain an area of low-lying ground adjacent to a river, formed mainly of river sediments and subject to flooding
glacier a large body of ice, formed by an accumulation of snow, that flows downhill under the pressure of its own weight
groundwater water that seeps into soil and gaps in rocks
hard engineering a coastal management technique that involves using physical structures to control the effects of natural processes
hotspot an area on the Earth's surface where the crust is quite thin and volcanic activity can sometimes occur, even though it is not at a plate margin
inselberg an isolated hill, knob, ridge, outcrop or small mountain that rises sharply from the surrounding landscape
intermittent describes a stream that does not always flow
leaching a process that occurs in areas of high rainfall; water runs through the soil, dissolving minerals and carrying them into the subsoil. Similar to a coffee pot where water drips through the grounds.
longshore drift a process by which material is moved along a beach in the same direction as the prevailing wind
mantle the layer of the Earth between the crust and the core
meander a winding curve or bend in a river
microclimate specific atmospheric conditions within a small area
oxbow lake a U-shaped body of water created when a wide meander is cut off from the main channel of a river after it changes its course. In Australia it is referred to as a billabong.
peninsula land jutting out into the sea
percolate filter through porous material such as soil
perennial describes a stream that flows all year
permafrost a layer beneath the surface of the soil where the ground is permanently frozen
physical processes continuing and naturally occurring actions such as wind and rain
plateau an extensive area of flat land that is higher than the land around it. Plateaus are sometimes referred to as tablelands.
precipitation the different forms in which moisture is returned to the Earth from the atmosphere, most commonly in the form of rain, hail, sleet and snow
prevailing wind the main direction from which the wind blows
rain shadow the dry area on the leeward side of a mountain; forms where mountains block rain-bearing winds
river delta a landform created by deposition of sediment that is carried by a river as the flow leaves its mouth and enters slower-moving or stagnant water. Can take three main shapes: fan shaped, arrow shaped and bird-foot shaped.
sediment material carried by water
shell middens Indigenous Australian archaeological sites where the debris associated with eating shellfish and similar foods has accumulated over time
soft engineering a coastal management technique where the natural environment is used to help reduce coastal erosion and river flooding
soluble able to be dissolved in water
stalactite a feature made of minerals, which forms from the ceiling of limestone caves, like an icicle. These are formed when water containing dissolved limestone drips from the roof of a cave, leaving a small amount of calcium carbonate behind.
stalagmite a feature made of minerals found on the floor of limestone caves. These are formed when water containing dissolved limestone deposits on the cave floor and builds up.
subduction when two tectonic plates converge, one will be forced under the other and into the mantle. The other plate will be pushed up, forming mountains.
swash the movement of water in a wave as it breaks onto a beach
tectonic plate one of the slow-moving plates that make up the Earth's crust. Volcanoes and earthquakes often occur at the edges of plates.
temperate zone describes the relatively mild climate experienced in the zones between the tropics and the polar circles
transboundary river a river that flows through multiple countries, creating international borders
transport the movement of eroded materials to a new location by elements such as wind and water

watershed an area or ridge of land that separates waters flowing to different rivers
weathering the breaking down of bare rock (mainly by water freezing and cooling as a result of temperature change) and the effects of climate

13.14.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview:

How do human and natural processes shape environments and what impacts does this have on the way people manage changing landscapes?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

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eWorkbooks Customisable worksheets for this topic
Reflection
Video eLesson Landscapes

13.14 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 7, 16, 17, 19	2, 4, 5, 6, 10, 13, 14, 15, 17, 18, 20	3, 8, 9, 11, 12

REMEMBER AND UNDERSTAND

1. What is the difference between a natural and a human environment.
   A. Natural environments are altered by humans whereas built environments are not.
   B. Built environments are altered by humans whereas natural environments are not.
   C. There is no difference because neither of them are altered by humans.
   D. Natural environments are larger than built environments.
2. Identify the statement that best explains how rivers and streams made physical changes to Australia's landmass.
   a. Through the process of folding, faulting and uplifting
   b. By transporting materials to new areas, creating floodplains and coastal landscapes
   c. By forming the Great Dividing Range
   d. None of the above
3. Why is soil so important?
   a. It is not important.
   b. It is the basis for plant growth, which feeds both people and animals.
   c. 75 per cent of mammals eat soil as their main source of nutrition.
   d. It protects the Earth from damage from the sun.

4. Landscapes are in a state of continual change. Which two natural processes powered by water are most responsible for continually changing landscapes.
   a. Erosion and weathering
   b. Erosion and deposition
   c. Transportation and deposition
   d. Transportation and calcification
5. Identify the term used to describe the laying down of material carried by rivers, wind, ice and ocean currents or waves.
   a. Erosion
   b. Sediment
   c. Transport
   d. Deposition
6. Identify the importance of fire in maintaining savanna grasslands by combining two of the following statements.
   a. It clears out the undergrowth and encourages new plant growth.
   b. It creates new habitats for animals.
   c. It prevents trees from taking over, as saplings are burnt in the process.
   d. The soil becomes more fertile.
7. A cave is formed by the process of:
   a. erosion.
   b. deposition.
   c. transpiration.
   d. condensation.
8. What is the main purpose of a 'groyne'.
   a. To hold the sand and grass area at the back of the beach
   b. To stop waves rushing onshore
   c. To take sand from further up the beach or another area, or to pump it from offshore
   d. To stop the sea from removing so much sand from the beach
9. Identify the term that describes the movement of water in a wave as it breaks onto a beach.
   a. Longshore drift
   b. Swash
   c. Watershed
   d. Tributary
10. Determine which of the following is *not* a method used to protect beach areas from erosion.
    a. Grommets
    b. Sea wall
    c. Sand renourishment
    d. Rock walls
11. Identify which of the following is *not* a water feature that shapes the land.
    a. Rain
    b. Temperature
    c. Glaciers
    d. Oceans
12. Despite the risks of flooding, a high level of agricultural activity is often found in floodplains. Besides the availability of water, identify another reason that explains this pattern.
    a. High human populations
    b. High levels of nutrients in soils
    c. High degree of sunlight
    d. High diversity of plants and animals

ANALYSE AND APPLY

13. **Differentiate** between the terms *erosion*, *deposition* and *transportation*.
14. **Propose** two reasons for the preservation of landscapes.
15. **Explain** how karst landscapes are formed.
16. **Identify** three factors that influence the formation of landscapes.

17. Answer the following:
    a. **Explain** why Aboriginal and Torres Strait Islander Peoples tended to live near the coast.
    b. **Explain** how coasts have been used since 1788.
18. **Identify** at least one economic, one environmental and one social reason for devising strategies to manage a river.
19. Match these features to the upper, middle or lower course of a river: V-shaped valley, floodplain, estuary, waterfall, meander, delta.
20. Place each of the following features into the correct column of the table below: arch, beach, blowhole, cave, cliff, headland, lagoon, sand dune, spit, stack.

Features formed by erosion	Features formed by deposition

Answers and sample responses for this topic are available online.

14 Geomorphological processes and hazards

LESSON SEQUENCE

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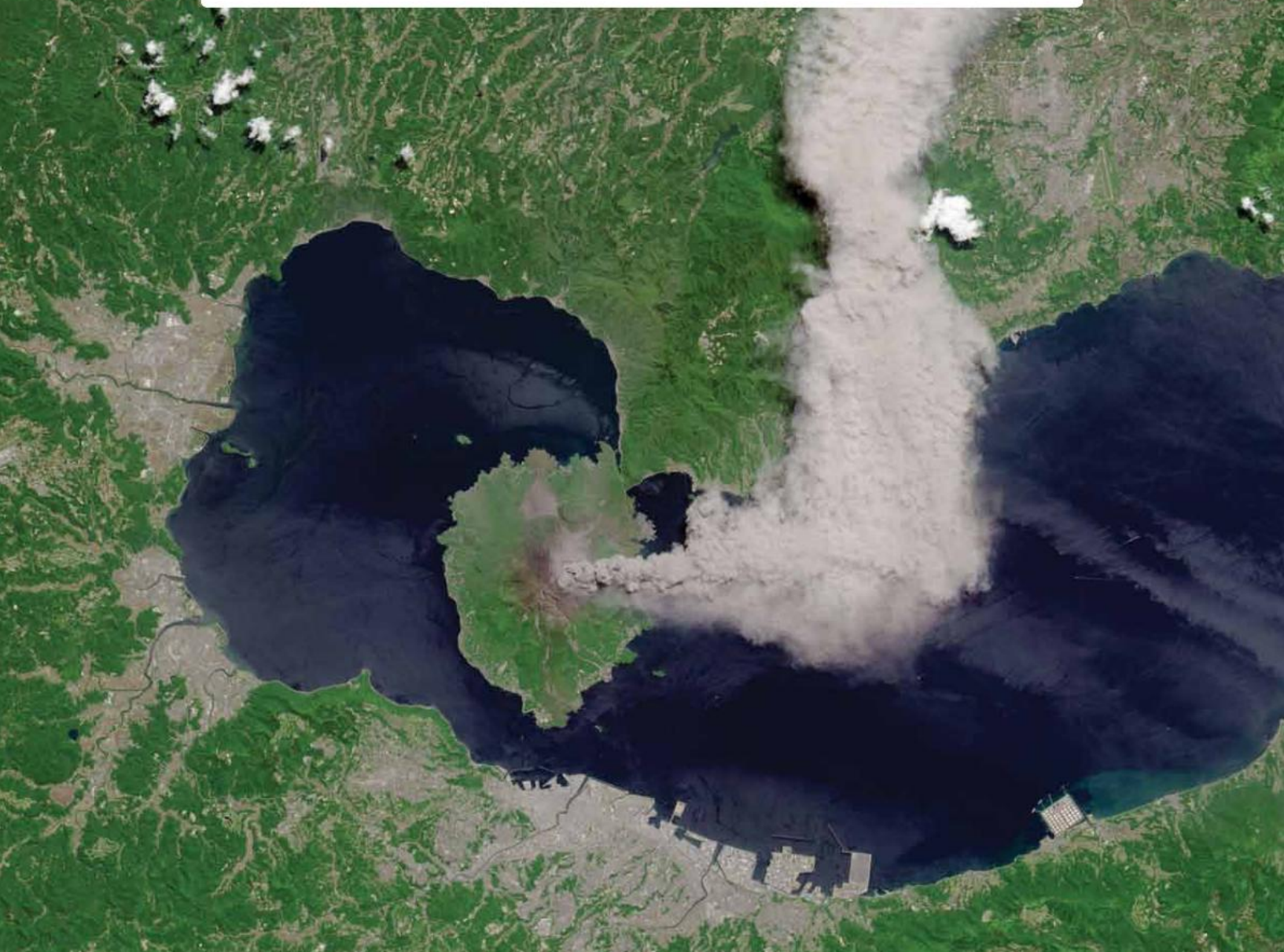

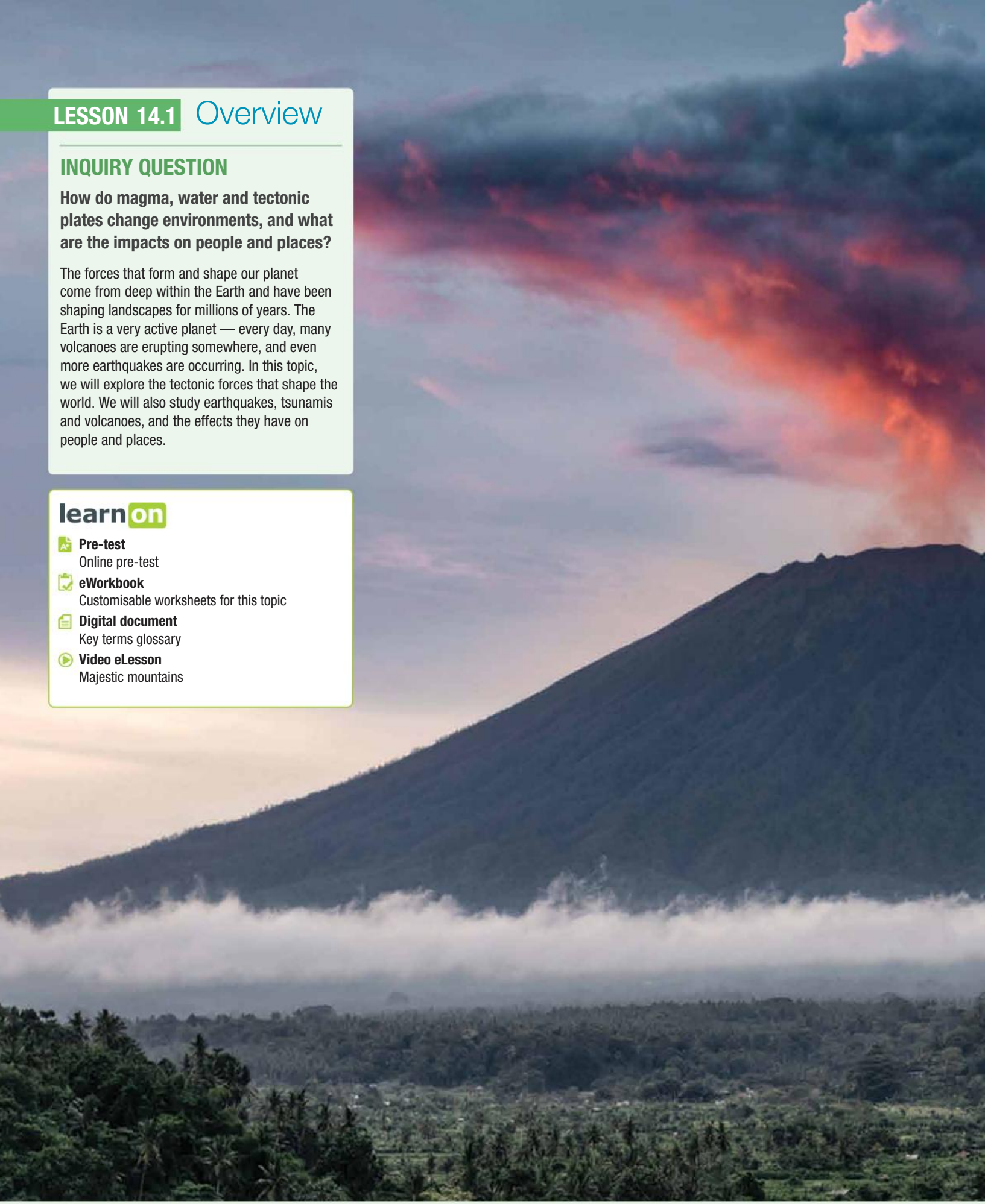

LESSON 14.1 Overview

INQUIRY QUESTION

How do magma, water and tectonic plates change environments, and what are the impacts on people and places?

The forces that form and shape our planet come from deep within the Earth and have been shaping landscapes for millions of years. The Earth is a very active planet — every day, many volcanoes are erupting somewhere, and even more earthquakes are occurring. In this topic, we will explore the tectonic forces that shape the world. We will also study earthquakes, tsunamis and volcanoes, and the effects they have on people and places.

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- **Pre-test**
  Online pre-test
- **eWorkbook**
  Customisable worksheets for this topic
- **Digital document**
  Key terms glossary
- **Video eLesson**
  Majestic mountains

SkillBuilder

Use the SkillBuilder activities to develop these Geographical concepts and skills:

- **GEOGRAPHICAL INQUIRY**
- **CONCLUDING AND DECISION-MAKING**
- **COMMUNICATING**

LESSON 14.2 What are plate tectonics?

LEARNING INTENTION

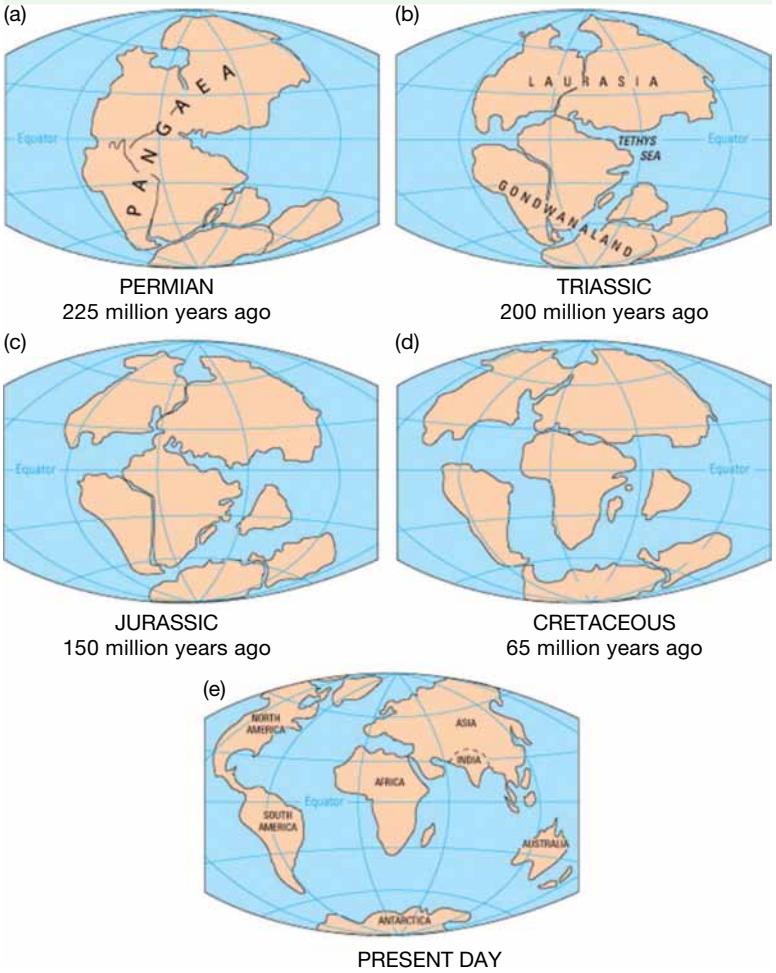
By the end of this lesson, you should be able to:

- **define** the key terms associated with plate tectonics
- **understand** the reasons why continental plates move
- **explain** how tectonics shape places.

Tune in

Examine **FIGURE 1**. The continents used to be joined together in one landmass called Pangaea. Over time they moved and spread out into the formation that exists today.

FIGURE 1 Movement of the continents



In pairs, mind-map and explain:

- why you think the continents move
- what evidence there might be to support this theory.

Make a list of three to four questions that you want answered after looking at these images. See if you can answer them by the end of the topic.

14.2.1 Tectonic plates

The Earth's crust is cracked and is made up of many individual moving pieces called tectonic plates, which fit together like a jigsaw puzzle. These plates float on the semi-molten rocks (magma) of the Earth's mantle.

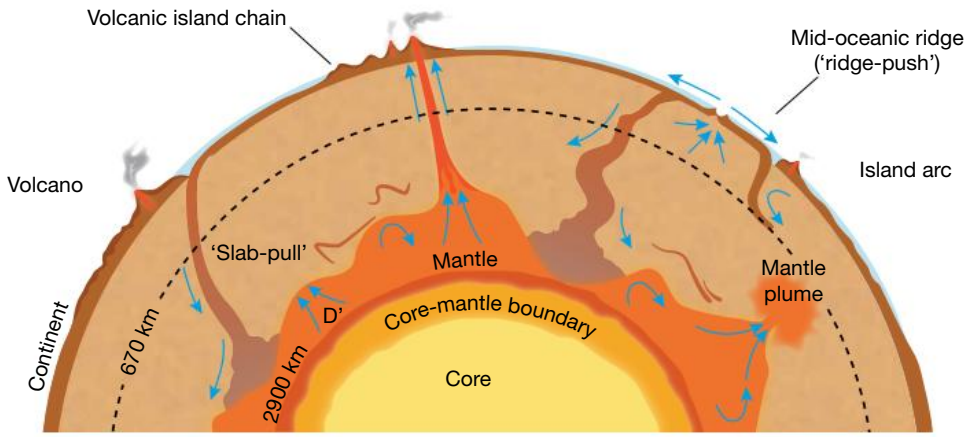
Enormous heat from the Earth's core, combined with the cooler surface temperature, creates **convection currents** in the magma. These currents can move the plates by up to 15 centimetres per year. Plates beneath the oceans move more quickly than plates beneath the continents. Scientific evidence shows that about 225 million years ago all the continents were joined.

SkillBuilder discussion

Communicating

1. Explain why tectonic plates move.
2. Identify the type of landform found where plates move away from each other.
3. Outline the landforms found where one plate subducts under another.

FIGURE 2 The Earth's core is very hot, while its surface is quite cool. This causes hot material within the Earth to rise until it reaches the surface, where it moves sideways, cools and then sinks.



Type of plate movement	Description	Examples
1. Convergent plates	When two continental plates of similar density collide, the pressure of the **converging plates** can push up land to form mountains.	Himalayas (India and Asia), Alps (Africa and Europe)
	Oceanic and continental plates have different densities, so when they collide the thinner oceanic plate is 'subducted', meaning it is forced down into the mantle. Heat in the mantle melts this subducted plate and pressure forces the molten material back to the surface through cracks in the Earth's crust. This can produce volcanoes and mountain ranges.	Andes (South America)
	Subduction can also occur when two oceanic plates collide. This forms a line of volcanic islands in the ocean about 70–100 kilometres past the subduction line.	Japan, Philippines, Mariana Trench
2. Lateral plate slippage	Convection currents can sometimes cause plates to slide, or slip, past one another, forming **fault** lines.	San Andreas Fault (California)
3. Divergent plates	In some areas, plates are moving apart, or diverging, from each other. As the **divergent plates** separate, magma can rise up into the opening, forming new land.	Iceland, underwater volcanoes and islands, the Rift Valley, Africa

(continued)

(continued)

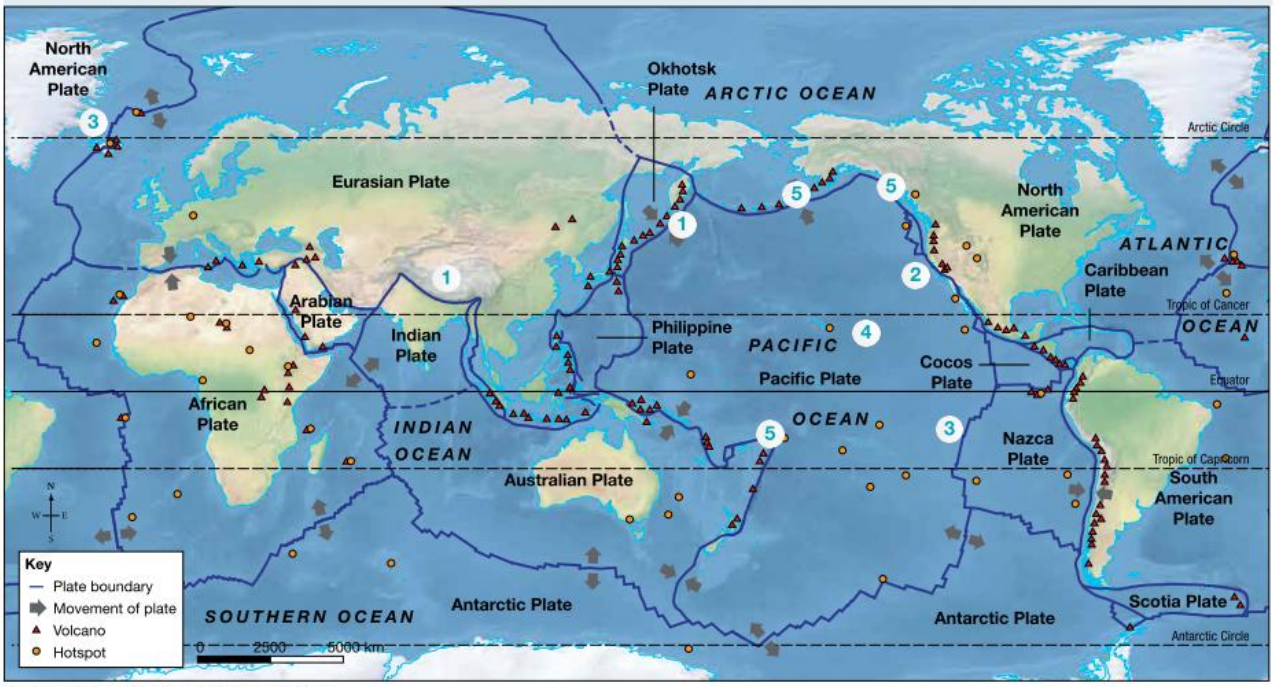
Type of plate movement	Description	Examples
4. Hotspots	There are places where volcanic eruptions occur away from plate boundaries. This occurs when there is a weakness in the oceanic plate, allowing magma to be forced to the surface, forming a volcano. As the plate drifts over the **hotspot**, a line of volcanoes is formed.	Hawaiian Islands
5. Pacific Ring of Fire	This is the most active tectonic region, shaped like a horseshoe around the Pacific Ocean. Formed by the movement of tectonic plates, it leads to many volcanoes and earthquakes. The Pacific Plate is being subducted under the North American Plate on its east and north sides, and under the Philippine and Australian plates on its west side. The Ring of Fire is an almost continuous line of volcanoes and earthquakes. Most of the world's earthquakes occur here, and 75 per cent of the world's volcanoes are located along the edge of the Pacific Plate.	Nazca and Cocos plates (South America), Pacific Plate (North America, Philippines)

SkillBuilder discussion

Geographical inquiry

1. Study **FIGURE 3.** Are most plate boundaries found on land or in the ocean?
2. Describe where the landmass of Australia is located on the Australian Plate.
3. Describe the interconnection between plate boundaries and volcanoes around the Pacific Ring of Fire.

FIGURE 3 World map of plates, volcanoes and hotspots



Source: Map drawn by Spatial Vision

14.2 SkillBuilder activity GEOGRAPHICAL INQUIRY

1. **Research** how plate tectonic theory first came to be accepted.
   a. **Identify** who came up with this theory.
   b. **Outline** three types of evidence cited to prove this theory.
2. **Construct** annotated diagrams of the three major plate boundaries. Make sure you include in your diagrams the direction of the flow of the convection current in the mantle. Include the following:
   - Convergent boundary (subduction zone)
   - Lateral plate boundary
   - Spreading plate boundary

14.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 6	3, 5, 7, 8	4, 9

REMEMBER AND UNDERSTAND

1. a. **Determine** whether the following statements are True or False.
   i. The world's volcanoes are randomly scattered over the Earth's surface.
   ii. Most of the world's volcanoes are concentrated along the edges of certain continents.
   iii. Island chains are closely linked with the location of volcanoes.
   iv. There are no active hotspots within the Pacific Ocean.
   b. Use the statements from parts a–d to write a **summary** paragraph, remembering to rewrite the false statements to make them true.
2. Convection currents:
   A. are the force that moves continents.
   B. are caused by heat rising and then cooling.
   C. start beneath the Earth's surface in the core and travel through the mantle.
   D. are all of the above.
3. The hotspot that helped form the Hawaiian Islands is:
   A. in the Central Pacific Ocean.
   B. in the Atlantic Ocean.
   C. no longer active.
   D. under the Antarctic ice sheet.
4. **Explain** the meaning of subduction when referring to plate movements. In your explanation include the plate that remains and the plate that subducts.
5. **Recall** two locations where plates are moving apart. **Explain** what is happening in these places.
6. **Identify** the type of plate boundaries that surround the Pacific Ocean.

ANALYSE AND APPLY

7. **Describe** the distribution of volcanoes shown in **FIGURE 3**. **Suggest** what this distribution has in common with the location of plate boundaries.

EVALUATE AND COMMUNICATE

8. Refer to **FIGURE 3**. **Propose** why Australia has no active volcanoes and relatively few earthquakes.
9. Refer to **FIGURE 3**. **Identify** three places where plates are converging. **Identify** the mountain ranges, if any, that are located in these places.

Answers and sample responses for this topic are available online.

LESSON 14.3 How do mountains form?

LEARNING INTENTION

By the end of this lesson, you should be able to:

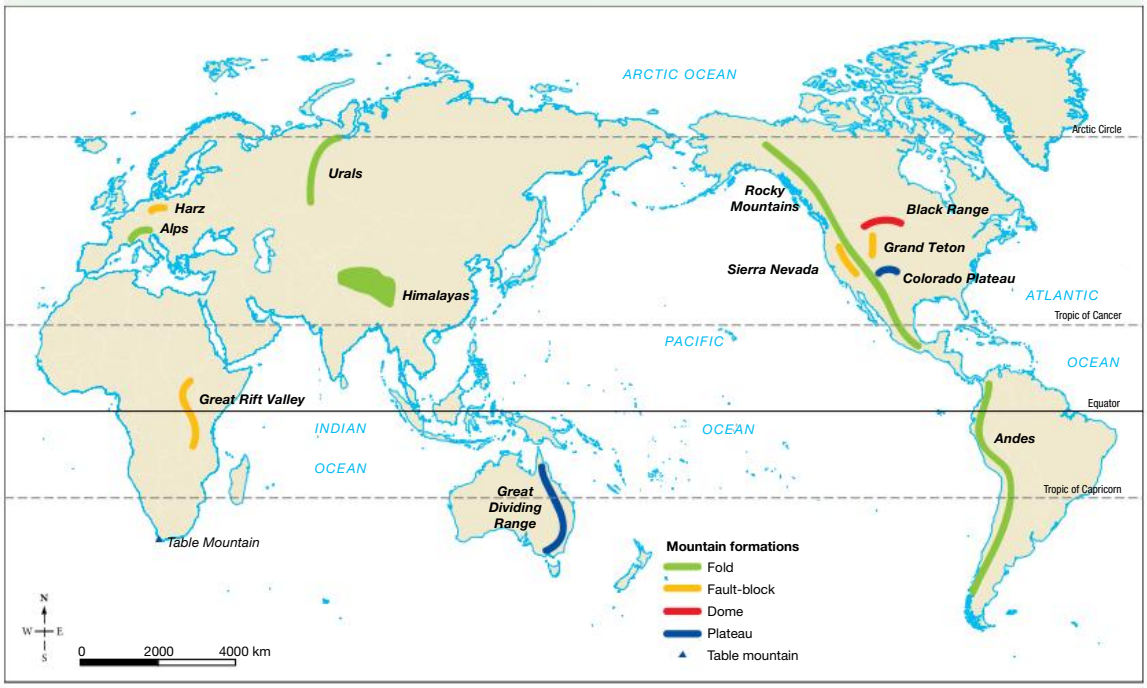
- **identify** and **describe** the different types of mountains
- **explain** how different mountain ranges have formed
- **discuss** the interconnection between fault lines and mountain ranges.

Tune in

Examine **FIGURE 1,** which focuses on mountains from around the world, and refer back to **FIGURE 3** in lesson 14.2 while completing the following 'tune in' questions.

1. **Can you see any similarities between the locations of mountains and the locations of plate boundaries? These kinds of similarities are known as spatial associations.**
2. **Which continent do you think has been the most tectonically active? Justify your response.**
3. **Think carefully about FIGURE 1. What other information would you like to see on this map?**

FIGURE 1 Selected world mountains



Source: Spatial Vision

A mountain is a landform that rises high above the surrounding land. Most mountains have certain characteristics in common, although not all mountains have all these features. Many have steep sides and form a peak at the top, called a summit. Some mountains located close together have steep valleys between them, which are known as gorges.

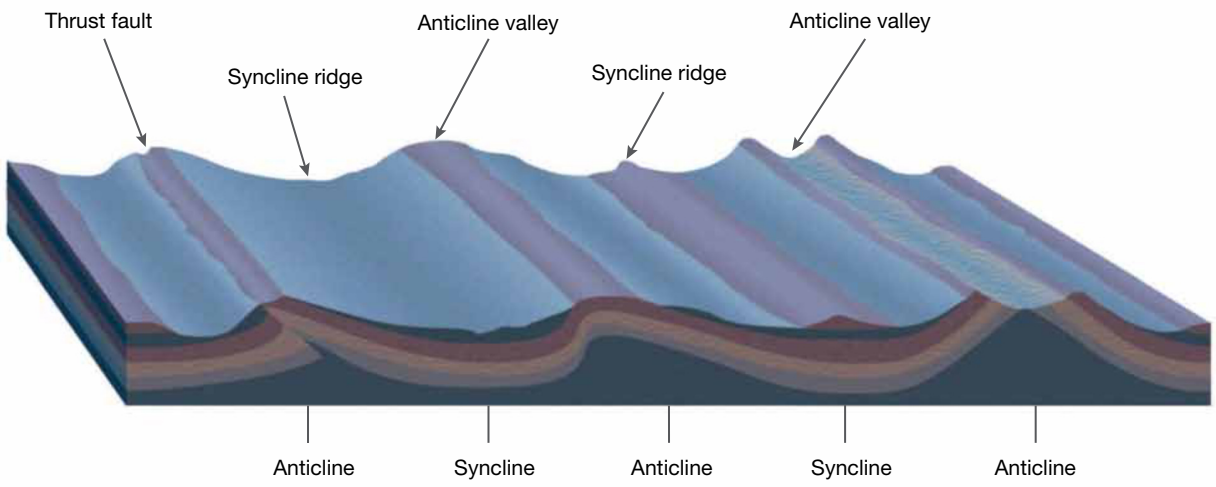
Mountains and mountain ranges have formed over billions of years from tectonic activity (movement in the Earth's crust). The Earth's surface is always changing — sometimes very slowly and sometimes dramatically.

The different movements and interactions of the **lithosphere** plates result in many different mountain landforms. Mountains can be classified into five different types, based on what they look like and how they were formed. These are fold, fault-block, dome, plateau and volcanic mountains. (Volcanic mountains are discussed in lesson 14.9.)

14.3.1 Fold mountains

The most common type of mountain, and the world's largest mountain ranges, are fold mountains. The process of folding occurs when two continental plates collide, and rocks in the Earth's crust buckle, fold and lift up. The upturned folds are called anticlines, and the downturned folds are synclines (see **FIGURE 2**). These mountains usually have pointed peaks.

FIGURE 2 The formation of fold mountains



Examples of fold mountains include:

- Himalayas in Asia
- Alps in Europe
- Andes in South America
- Rocky Mountains in North America
- Urals in Russia.

SkillBuilder discussion

Geographical inquiry

1. Explain to a partner why fold mountains form.
2. What is the difference between an anticline and a syncline?
3. In **FIGURE 2**, where is the plate boundary?

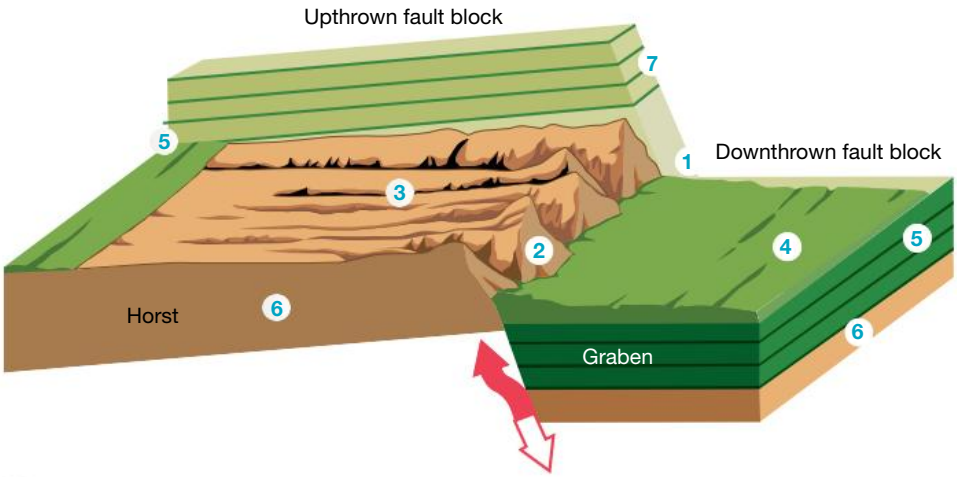
FIGURE 3 The pointed peaks of the Ural Mountains in Russia

14.3.2 Fault-block mountains

Fault-block mountains form when faults (or cracks) in the Earth's crust force some parts of rock up and other parts to collapse down. Instead of folding, the crust fractures (pulls apart) and breaks into blocks. The exposed parts then begin to erode and shape mountains and valleys (see **FIGURE 4**).

Fault-block mountains usually have a steep front side and a sloping back. The Sierra Nevada and Grand Tetons in North America, the Great Rift Valley in Africa, and the Harz Mountains in Germany are examples of fault-block mountains. Another name for the uplifted (upthrown) blocks is *horst*, and the collapsed (downthrown) blocks are *graben*.

FIGURE 4 The formation of fault-block mountains



1 Fault zone
2 Steep eastern face
3 Gentle western slope
4 Valley floors filled with sediments of cobbles, gravel and sand
5 Sedimentary rock layers
6 Bedrock
7 Sedimentary rock layers (5) now worn away

FIGURE 5 Examples of fault-block mountains overlooking the Great Rift Valley in northern Kenya, Africa

14.3.3 Dome mountains

Dome mountains are named after their shape. They are formed when molten magma in the Earth's crust pushes its way towards the surface. The magma cools before it can erupt, and it then becomes very hard. The rock layers over the hardened magma are warped upwards to form the dome. Over time these erode, leaving behind the hard granite rock underneath (see **FIGURE 6**).

FIGURE 6 Very hot magma pushes towards the surface to form dome mountains.

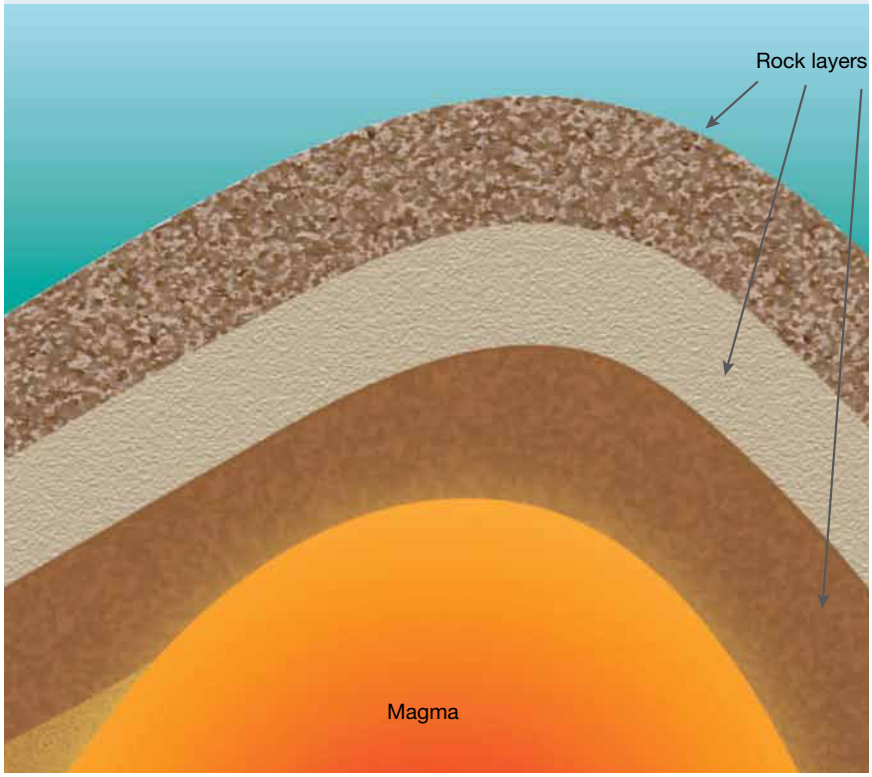


FIGURE 7 Ben Nevis in Scotland is an example of a dome mountain.

14.3.4 Plateau mountains

Plateaus are high areas of land that are large and flat. They have been pushed above sea level by tectonic forces or have been formed by layers of lava. Over billions of years, streams and rivers cause erosion, leaving mountains standing between valleys. Plateau mountains are sometimes known as erosion mountains.

Examples of plateau mountains include parts of the Great Dividing Range in Australia (see **FIGURE 8**) and the Colorado Plateau (see **FIGURE 9**) in the United States.

FIGURE 8 The Blue Mountains in New South Wales are an example of a plateau mountain.

FIGURE 9 The Colorado Plateau in the United States was raised as a single block by tectonic forces. As it was uplifted, streams and rivers cut deep channels into the rock, forming the features of the Grand Canyon.

14.3.5 How were the Himalayas formed?

Before the theory of tectonic plate movement, scientists were puzzled by findings of fossilised remains of ancient sea creatures near the Himalayan peaks. Surely these huge mountains could not once have been underwater?

The mystery was solved when scientists came to understand plate movements. About 220 million years ago, India was part of the ancient supercontinent we call **Pangaea**. When Pangaea broke apart, India began to move northwards at a rate of about 15 centimetres per year.

When the plate carrying India collided with Asia 40–50 million years ago, the oceanic crust (carrying fossilised sea creatures) crumpled and was uplifted, forming the high mountains we know today.

Therefore, the Himalayas were formed when India crashed into Asia and pushed up the tallest mountain range on the continent.

The Himalayas are known as young mountains, because they are still forming. The Indian and Australian plates are still moving northwards at about 45 millimetres each year, making this boundary very active. It is predicted that over the next 10 million years, the Himalayan mountains will increase in height by about 5 millimetres each year. It is important to note that movement of tectonic plates is often sudden and causes earthquakes.

SkillBuilder discussion

Investigating

Based on what you have read, and the information in **FIGURE 10**, work in pairs to make a list of five questions you could ask to find out more about the geographical phenomenon of plate movements.

FIGURE 10 The movement of the Indian landmass to its current location

Source: Map drawn by MAPgraphics Pty Ltd, Brisbane

14.3 SkillBuilder activity GEOGRAPHICAL INQUIRY

1. **Explain** the formation of fold mountains. You can **create** a flow chart to help with your explanation.
2. **Discuss** why this type of tectonic activity creates mountain ranges and not individual peaks.
3. **Explain** why you think the largest mountains of the world are created through this process.

14.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 7, 8	5, 6

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statements are True or False.
   a. Fold mountains are the most common type of mountain in the world.
   b. The Sierra Nevada mountain range was formed by the eastern part of a fault-block tilting up.
   c. Dome mountains are found where magma has once been near the surface.
   d. The Blue Mountains in New South Wales are an example of plateau mountain.
2. **Explain** how the shape of each of the mountains shown in this lesson provides clues to how they were formed. **Select** the correct option for each statement.
   a. High peaks are **dome** / **plateau** / **fault** / **fold** mountains.
   b. Block-shaped mountains with one steep and one sloping side are **dome** / **plateau** / **fault** / **fold** mountains.
   c. Rounded summits are **dome** / **plateau** / **fault** / **fold** mountains.
   d. High areas of large, flat land with valleys are **dome** / **plateau** / **fault** / **fold** mountains.
3. The Himalayas are considered a young mountain range because they are still _____. The Himalayas are _____ mountains.
4. **Define** *Pangaea* and *lithosphere*.

ANALYSE AND APPLY

5. **Explain** why there are extensive fold mountain ranges along the western coastlines of North and South America. (Refer to **FIGURES 1** and **2** in your response.)
6. Use **FIGURE 10** to **explain** how the Himalayas formed.
7. Refer to **FIGURE 9**. Describe how tectonic forces helped to form the Grand Canyon. Give an example of how similar forces shaped another landscape.

EVALUATE AND COMMUNICATE

8. Think carefully about the battle between erosion and plate tectonics. **Propose** why Australia is the world's lowest (least elevated) and flattest continent.

Answers and sample responses for this topic are available online.

LESSON 14.4 Where are the world's mountain ranges?

LEARNING INTENTION

By the end of this lesson, you should be able to:

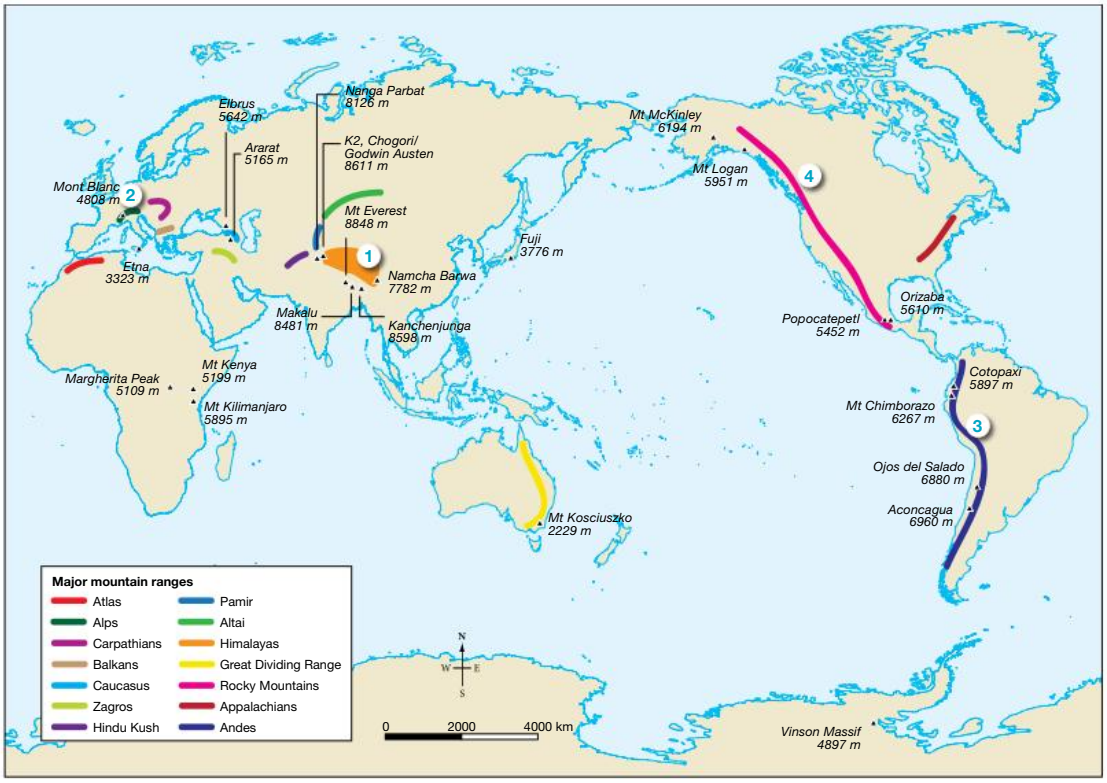
- **describe** the location of the world's main mountain ranges
- **identify** the effect of altitude on mountain weather and ecosystems.

Tune in

Long chains or groups of mountains located close together are called a mountain range. Examine **FIGURE 1,** which details the main mountains and mountain ranges around the world.

1. **Which are the two longest mountain ranges in the world? Why might they be located where they are?**
2. **Which is the highest mountain range in the world? Discuss why this may be the case.**
3. **Which mountain range has the lowest elevation in this map? Propose why.**

FIGURE 1 The world's main mountains and mountain ranges



Source: Map drawn by Spatial Vision

1 The Himalayas

Located in Asia, the Himalayas (meaning *land of snow*) are the highest mountain range in the world. They extend from Bhutan and southern China in the east, through northern India, Nepal and Pakistan, to Afghanistan in the west. The Himalayas are one of the youngest mountain ranges in the world. The 14 highest mountains in the world — all over 8000 metres above sea level — are all in the Himalayas.

2 **The Great Dividing Range**
The Great Dividing Range, located primarily along the east coast of Australia, is one of the longest mountain ranges in the world. It extends 3500 kilometres from North Queensland in the north to the Grampians in Victoria in the south. It is the longest continuous mountain range found in a single country and is Australia's most pronounced topographical feature. The highest peak in the Great Dividing Range is Mt Kosciuszko at 2228 metres.

3 **The Andes**
The Andes are located in South America, extending north to south along the western coast of the continent. The Andes are the second-highest mountain range in the world, with many of its mountains reaching over 6000 metres in height. At 7200 kilometres long, this is also the longest mountain range in the world.

4 **The Rocky Mountains**
The Rocky Mountains in western North America extend north–south from Canada to New Mexico, a distance of around 4800 kilometres. The highest peak is Mount Elbert, in Colorado in the United States, which has a height of 4401 metres above sea level. The other large mountain range in North America is the Appalachian Mountains, which extend 2400 kilometres from Canada in the north to Alabama in the southern United States.

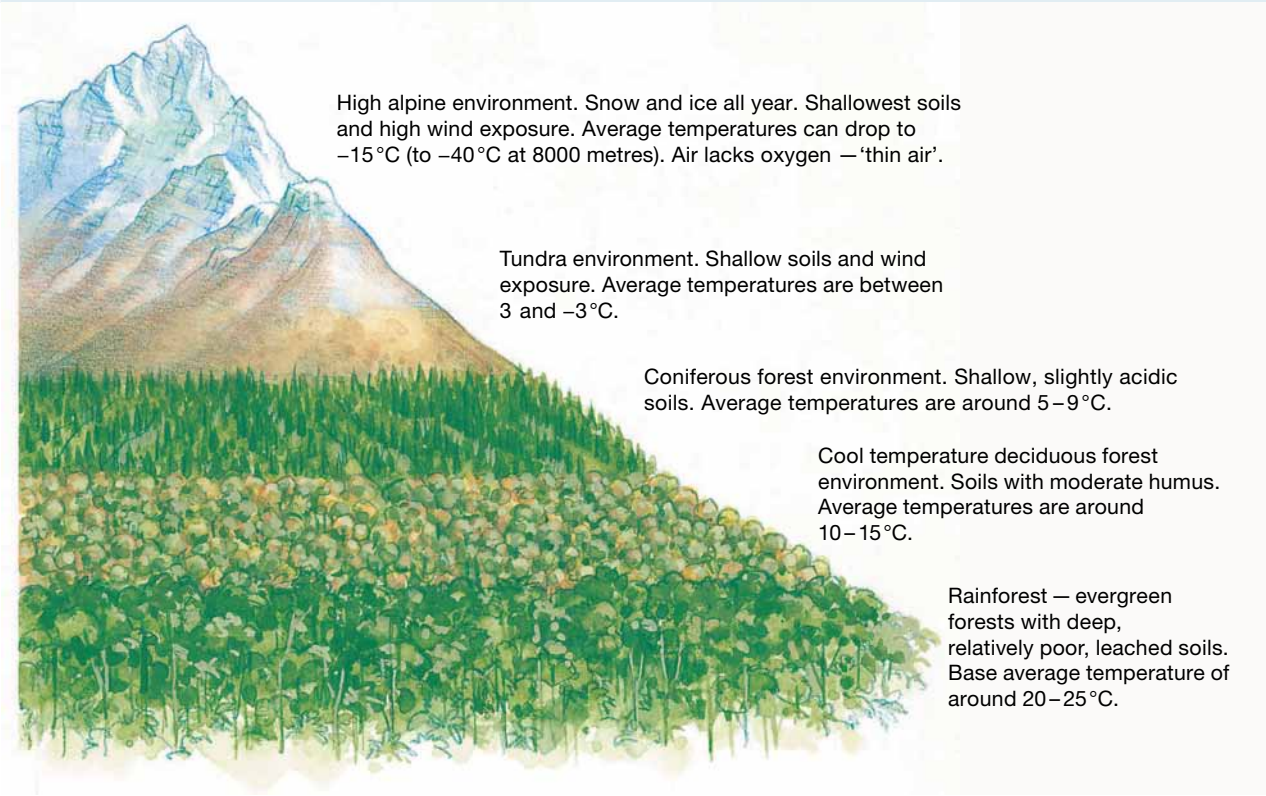
Mountains make up a quarter of the world's landscape. They are found on every continent and in three-quarters of all the world's countries. Only 46 countries have no mountains or high plateaus, and most of these are small island nations.

Some of the highest mountains are found beneath the sea. Some islands are actually mountain peaks emerging out of the water. Even though the world's highest peak (from sea level) is Mount Everest in the Himalayas (at 8850 metres high), Mauna Loa in Hawaii is actually higher when measured from its base on the ocean floor.

14.4.1 Mountain climate and weather

It is usually colder at the top of a mountain than at the bottom, because air gets colder with **altitude**. Air becomes thinner and is less able to hold heat. For every 1000 metres you climb, the temperature drops by 6 °C.

FIGURE 2 Ecosystems change with altitude on mountains.



SkillBuilder discussion

Geographical inquiry

1. Explain why there are no trees in the tundra and high alpine environments.
2. Research why coniferous trees would be found at the highest elevation of all the tree types.
3. What is the difference between deciduous trees and evergreen trees? Explain why they would be found at their respective elevations.

14.4 SkillBuilder activity GEOGRAPHICAL INQUIRY

1. Work in groups of four to six to **investigate** some of the following mountain ranges.
   - Antarctica — Antarctic Peninsula, Transantarctic Mountains
   - Africa — Atlas Mountains, Eastern African Highlands, Ethiopian Highlands
   - Asia — Hindu Kush, Himalayas, Taurus, Elburz, Japanese Mountains
   - Australia – MacDonnell Ranges, Great Dividing Range
   - Europe — Pyrenees, Alps, Carpathians, Apennines, Urals, Balkan Mountains
   - North America — Appalachians, Sierra Nevada, Rocky Mountains, Laurentians
   - South America — Andes, Brazilian Highlands
2. Each student in the group should choose a different range and complete the following tasks:
   a. **Map** the location of the range in its region.
   b. **Describe** the climate experienced throughout the range.
   c. **Name** and provide images of a selection of plants and animals found in the range.

14.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 4, 8	2, 6, 7	5, 9

REMEMBER AND UNDERSTAND

1. **25** / **50** / **75** / **90** per cent of the Earth's surface is covered by mountains.
2. **Identify** the:
   a. highest mountain range in the world
   b. longest mountain range in the world
   c. second-longest mountain range in North America.
3. **Identify** the name given to long chains or groups of mountains located close together.
   A. Mountain line B. Mountain link C. Mountain range D. Mountain cluster
4. **Identify** which of the below are features of a high alpine environment. **Select** all that apply.
   A. Evergreen forests
   B. Average temperatures of as low as –15 °C
   C. Snow and ice all year
   D. Tundra environment
   E. High wind exposure
   F. Shallowest soils
   G. Soils with moderate humus
   H. Average temperatures of between 3 and –3 °C
   I. Air lacking oxygen
   J. Cool-temperature, deciduous-forest environment

ANALYSE AND APPLY

5. Refer to **FIGURE 2**. **Describe** how vegetation changes on a mountain.
6. Refer to **FIGURE 1**.
   a. **Describe** how the scale of the world's mountains varies across the continents.
   b. **Identify** where the Appalachian Mountains are located.
7. **Imagine** you are a mountaineer, climbing to the top of Mont Blanc. **Suggest** the type of clothing you will need to wear for such a climb.
8. **Identify** the states of Australia through which the Great Dividing Range extends.
9. Discuss why temperature and oxygen levels drop the higher you travel up a mountain.

Answers and sample responses for this topic are available online.

LESSON 14.5 How do people connect with mountains?

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **identify** the ways people value significant landscapes
- **identify** the challenges for people living on mountains
- **explain** the importance of mountains to different cultural groups.

Tune in

Discuss how you think rice crops grow and consider why the people who live here would need to build these terraces. If you have time, quickly research this information to find out how accurate you were.

Think about why hillsides and the slopes of mountains may provide ideal growing conditions. Discuss in a small group and present your theory to the class.

FIGURE 1 The Longshen rice terraces in China show how a mountainside can be changed to grow food.

14.5.1 Mountain people and cultures

People have moved through and lived in mountain areas for thousands of years. But few people live in the world's highest mountain ranges, where it can be very cold and difficult to grow food and make a living. Thousands of people visit mountains, often in remote areas, for recreation and to see the spectacular scenery, plants and animals, historic and spiritual sites, and different cultures. Mountains are also vital for global water supply.

Around 12 per cent of the world's people live in mountain regions. About half of those live in the Andes, the Himalayas and the mountains of central and eastern Africa.

Usually, population density is very low in these areas. One reason for this is that mountains are very difficult to cross, as they are often rugged and covered with forests and wild animals. They can also be hard to climb and may have ice, snow or glaciers that make travel dangerous. Another reason is that soil quality is often poor and intensive farming is difficult without significant effort and expertise.

14.5.2 Mountain landscapes in Australia

There are many Aboriginal and Torres Strait Islander creation stories that are linked to mountain landscapes. These teachings help explain the formation and importance of each landscape and landform.

Aboriginal and Torres Strait Islander Peoples are the guardians of culture and Country. Stories are passed on through the generations and explain the origin of the world and the environment.

The Stirling Ranges

The mountains of the Stirling Ranges and the Porongurups are some of the oldest in the world and extend across the Great Southern region in Western Australia (see **FIGURE 2**). These mountains lie on the Menang people's land and stories passed from generation to generation tell of how these ranges were interlaced from the very beginning.

FIGURE 2 Stirling Range National Park

FIGURE 3 The story of the ranges, as told by Menang Elder Vern Gillies

The Borrongup (the Porongurups) was regarded as a sacred but dangerous place, the home of the totem spirits.

Hunting was forbidden in the area. It was said that the wagyl, the snake, lived in the peaks of the mountain, and the jarnaks, or ghosts and evil spirits, lived among the rocks.

What and Watami were members of the Bronzewing Pigeon people, who lived to the west of the Porongurups.

One day What, the woman, went out into the bush to find food.

Every so often, she called out to her husband to tell him what she was looking for, and what she was finding. He wasn't happy with what she was finding.

Eventually, What found a snake which was considered to be a real delicacy, and she ate it all.

She didn't give any to her husband all the more for her.

But when Watami found out, he became very, very angry. He struck her and broke her leg, then he walked away and left her.

What became very sick, and she dragged herself along where the King River runs, until she reached the place that we know as Green Island she then lay down and died.

Her faithful dog then picked up her scent and followed her tracks, and when he found her he started to dig all around her.

And he dug, and dug and as he dug, he sprayed dirt over her to cover her, to make a grave for her. He dug for a long, long time, until the sea rushed in to form what we now know as Oyster Harbour.

In the meantime, What's son found out what his father had done, and went out seeking revenge.

He caught him, and he speared him at the first mountain in the Stirling Ranges, which is what we know as Yongah Mia. Yongah means man, and Mia is the throwing stick.

Remarkably, from the air, the mountain clearly looks like a throwing stick.

Source: ABC Great Southern WA

SkillBuilder discussion

Communication

Stories like the one in **FIGURE 3** have a number of messages; in this case, providing moral guidance as well explaining the geography of the land.

1. How did the Indigenous people of this region view this land?
2. Suggest what is the 'moral message' of this story.
3. Identify and explain how this story provides an explanation of the geography of this region.

14.5.3 Sacred and special places

Mountain landscapes often have special meaning to certain groups of people. This might be because the location includes sacred sites or religious symbols; it might also be because people want to be close to nature or to feel spiritually inspired or renewed.

Mountaineers who take great risks, climbing alone or in small groups, often find a special meaning in mountain environments. They may hold deep spiritual, **cultural** and aesthetic (relating to beauty) values and ideas, and these will often inspire such people to care for and protect mountain environments.

The following list gives examples of mountains that are connected to various beliefs and religions.

- Hindus and Buddhists have beliefs about Mount Kailash in the Himalayas.
- Hindus in Bali, Indonesia, have a special connection with Mount Gunung Agung.
- Tibetan Buddhists revere Chomolungma (Mount Everest).
- The landscape of Demojong in the Himalayas is also sacred to Tibetan Buddhists.
- Nanda Devi in the Himalayas is a sacred site for both Sikh and Hindu communities, and is a UNESCO World Heritage site.
- Mount Fuji, in Japan, is a place of spiritual and cultural symbolism to Japanese people.
- Saint Katherine Protectorate in South Sinai, Egypt, is in an area that's considered holy by Jews, Christians and Muslims.
- Jabal La'lam is a mountain that is sacred to the people of northern Morocco.

FIGURE 4 Words from the Kosciuszko Aboriginal Working Group on the Australian National Parks website

The Mountains are very old and an ongoing life force that strengthens the ancestral link of our people.

We have a living, spiritual connection with the mountains.

We retain family stories and memories of the mountains, which makes them spiritually and culturally significant to us.

Our traditional knowledge and cultural practices still exist and need to be maintained.

– Kosciuszko Aboriginal Working Group

Source: https://theaustralianalpsnationalparks.org/the-alps-partnership/culture-and-history/aboriginal-heritage/

14.5.4 Skills to survive

It can be hard to make a living in mountain regions. People living in small, isolated mountain communities have learnt to use the land and resources sustainably. Many practise shifting cultivation, migrate with grazing herds and have terraced fields.

Some of the world's oldest rice terraces (see **FIGURE 1**) are over 2000 years old. Rice and vegetables could be grown quite densely on the terraces. This enabled people to survive in a region with very steep slopes and high altitude.

Indigenous Australians would move through the Australian Alps following food sources. The mountain caves where the bogong moths would gather were known to Aboriginal Peoples, who used the moths as an important source of protein. They would place climbing notches in trees that were known to have native bee hives present, in order to gather honey seasonally. The mountain valleys were often sought out during summer months because of the rivers that did not run dry.

Mountains supply 60 – 80 per cent of the world's fresh water. This is due to **orographic rainfall** (caused by warm, moist air rising and cooling when passing over high ground, such as a mountain; as the air cools, the water vapour condenses and falls as rain). Where precipitation falls as snow, water is stored in snowfields and glaciers. When these melt, they provide water to people when they need it most.

FIGURE 5 Living in mountain regions can be difficult.

14.5 SkillBuilder activity COMMUNICATING

Choose one of the mountains from the list in 14.5.3 (Sacred and special places).

1. Use the internet to **investigate** more details about the mountain. Focus on the spiritual, aesthetic and cultural value that people associate with your chosen mountain.
2. **Create** a map with all aspects of BOLTSS and provide information on the natural and human features.
3. **Present** your information as a print or electronic brochure.

14.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 5	2, 4, 8, 10	6, 7, 9

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statements are True or False.
   a. People have lived in mountain ranges for thousands of years.
   b. Many people live above the snow line on the highest mountains on earth.
   c. Population density in mountain ranges is relatively low.
   d. Soil quality is often very good in mountain ranges.
2. **Suggest** what type of work and recreation people can undertake in mountain regions. **Present** this information in a written format or in a diagram.
3. Mountains are **useful / vital / harmful** for the global water supply.
4. **Describe** how different groups of people value mountainous places. Use three examples in your description.
5. Orographic rainfall occurs:
   A. in and around mountain ranges.
   B. in desert regions.
   C. over the ocean.
   D. over large cities and settlements.

ANALYSE AND APPLY

6. **Describe** how the natural mountain environment in **FIGURE 1** has been changed by people. You should also **create** a sketch of the photo and make notes to show the changes.
7. Imagine you work as a park ranger in the Stirling Ranges. **Explain** how creation stories of the region can help other people understand this environment.
8. a. **Describe** how the natural mountain environment in **FIGURE 5** has been changed by people.
   b. **Explain** how it compares to the land changes in **FIGURE 1**.
9. **Identify** and **explain** the challenges of living in mountain environments.
10. Think of a mountain you have visited or seen. **Decide** if you feel inspired by mountain environments. **Suggest** how spiritual or religious beliefs linked to mountain landscapes can help in protecting them.

Answers and sample responses for this topic are available online.

LESSON 14.6 What are earthquakes?

LEARNING INTENTION

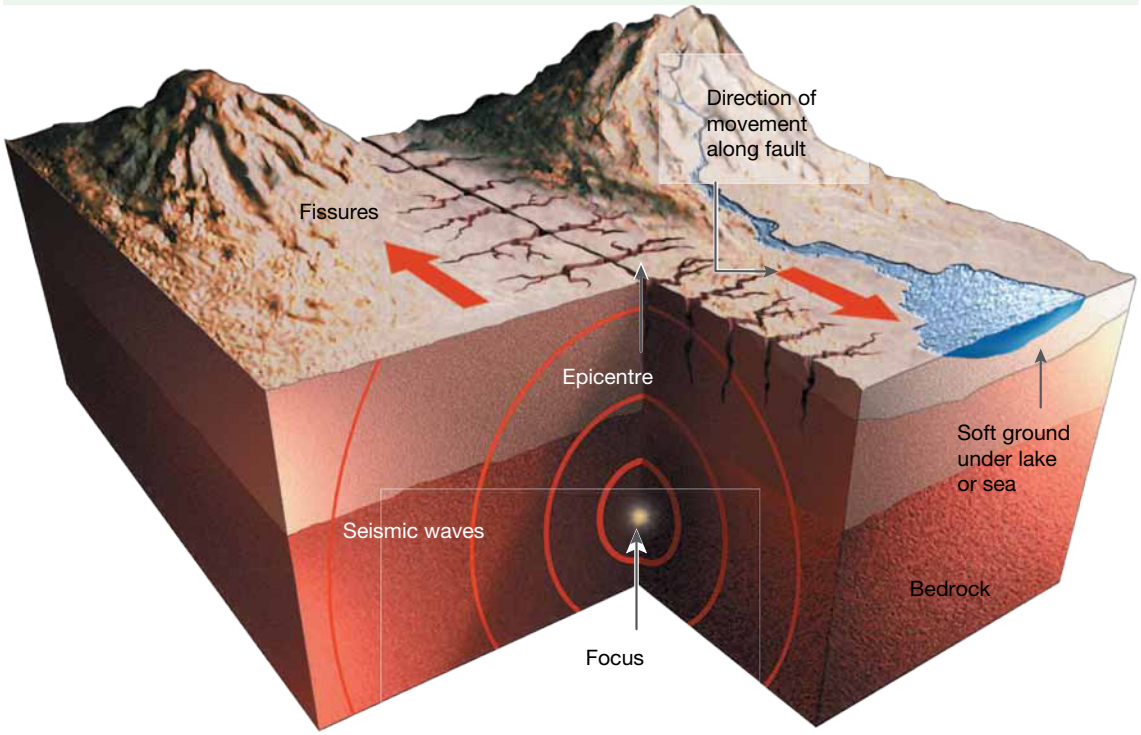
By the end of this lesson, you should be able to:

- **identify** the processes that produce earthquakes
- **define** the key terms *earthquake*, *epicentre*, *fault plane*, *focus*, *seismic waves*, *primary waves* and *secondary waves*
- **understand** how earthquakes are measured.

Tune in

Examine **FIGURE 1**, a diagram explaining what occurs during an earthquake.

FIGURE 1 What happens during an earthquake?



1. **Discuss what you think might be the difference between the focus and epicentre of an earthquake.**
2. **What factors might contribute to some earthquakes resulting in a lot of damage whereas others result in little damage?**

14.6.1 Earthquakes

An earthquake is the sudden shaking of the ground caused by the passage of seismic waves through the Earth's crust. Earthquakes occur every day somewhere on the planet, usually on or near the boundaries of tectonic plates. There is a strong relationship between the location of plate boundaries and the occurrence of earthquakes (see **FIGURE 2**). Weaknesses and cracks in the Earth's crust near plate boundaries are called faults (or the **fault plane**). An earthquake is usually a sudden movement of the layers of rock at these faults.

The point where an earthquake occurs is called the **focus** (see **FIGURE 1**). Earthquakes can occur near the Earth's surface or up to 700 kilometres below. The shallower the focus, the more powerful the earthquake will feel. Energy travels quickly from the focus point in powerful **seismic waves**, radiating out like ripples in a pond. The seismic waves decrease in strength as they travel away from the **epicentre**.

There are three main types of seismic waves. **Primary waves**, or P-waves, are the first waves to arrive, and are felt as a sudden jolt. Depending on the type of rock or water in which they are moving, these waves travel at speeds of up to 30 000 kilometres an hour.

Secondary waves, or S-waves, arrive a few seconds after the P-waves and travel at about half the speed. These waves cause more sustained up-and-down movement.

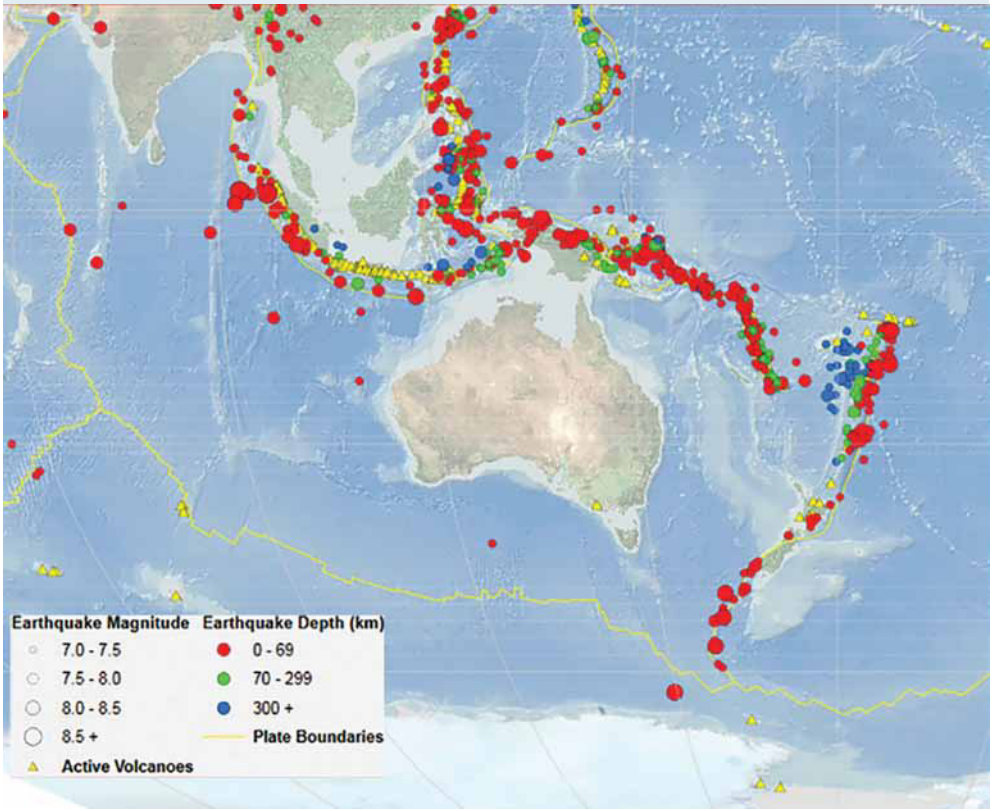
Surface waves radiate out from the epicentre and arrive after the main P-waves and S-waves. These move the ground either from side to side, like a snake moving or in a circular movement. Even very strong buildings can collapse as a result of these combined movements.

SkillBuilder discussion

Geographical inquiry

1. Study **FIGURE 2.** Discuss the interconnection between plate boundaries (faults) and earthquakes.
2. Identify which of Australia's neighbours experience earthquakes and have volcanoes.
3. Describe why Australia experiences few major earthquakes.

FIGURE 2 Earthquakes in our region, 1900–2013



Source: USGS

Measuring earthquakes

Earthquakes are measured according to their magnitude (size) and intensity. There are three ways we measure earthquakes.

The Richter scale

The Richter scale was first developed in 1935 and has been, until recent times, the main way we measure the magnitude of an earthquake. It operates as a logarithmic scale where each number on the scale is approximately ten orders of magnitude larger than the previous number.

For example, an earthquake that shows 5 on the Richter scale is ten times stronger than an earthquake that shows 4 on the Richter scale.

The modified Mercalli scale

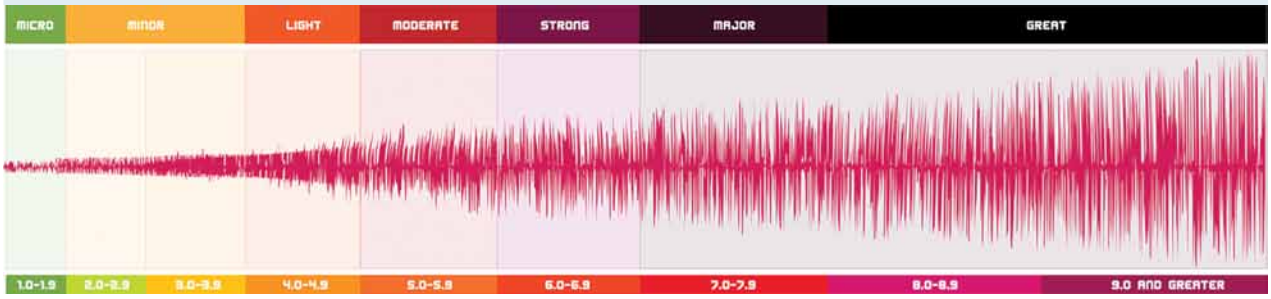
This measures the amount of damage caused by an earthquake, so where an earthquake rates on this scale is dependent on human factors, such as the strength of buildings and population density.

The moment magnitude scale

This scale is used by seismologists today to measure the total amount of energy released during an earthquake and is more accurate, particularly with larger earthquakes, than the Richter scale. The moment magnitude scale (**M_W**) reflects the distance a fault is moved and the force required to move it.

For media purposes, seismologists convert the recording on the **M_W** to a Richter scale number, because that is the measurement most people are familiar with (**FIGURE 3**).

FIGURE 3 Earthquake magnitude scale, from 1.0 to over 3.0



CASE STUDY

What caused the 2015 Nepal earthquake?

On 25 April 2015, a 7.8-magnitude earthquake struck Nepal. The epicentre of this earthquake was quite shallow — only 15 kilometres below the Earth's surface. It occurred approximately 80 kilometres to the north-west of Kathmandu, Nepal's capital.

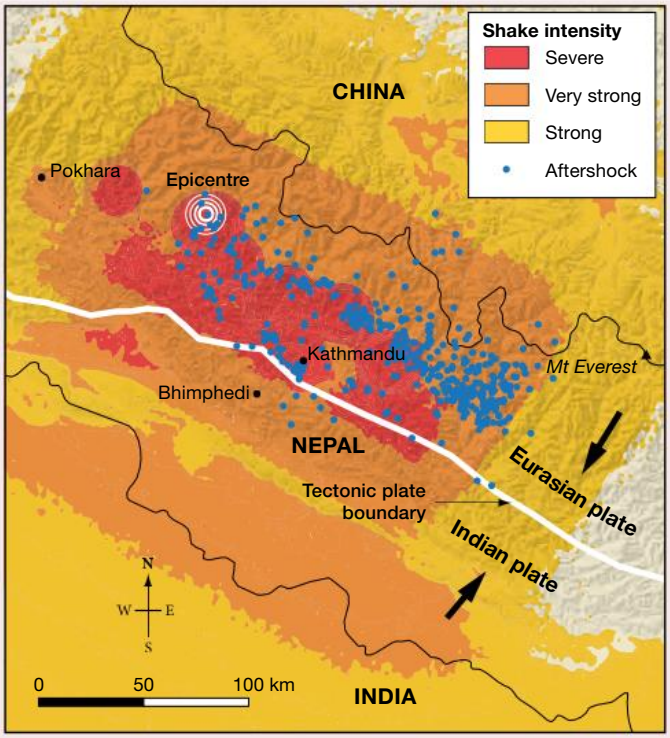
At this location, the Indian Plate to the south is subducting under the Eurasian Plate to the north (see **FIGURE 2**). This is occurring at a rate of approximately 45 millimetres per year and is causing the uplift of the Himalayas (see the case study in lesson 14.3).

During the Nepal earthquake event, nearly 9000 people were killed and nearly 18 000 were injured.

FIGURE 4 shows that the earthquake released a large amount of energy and caused large slips of up to 4 metres of the Earth's surface. The shaking from this earthquake was felt in China, India, Bhutan and much of western Bangladesh.

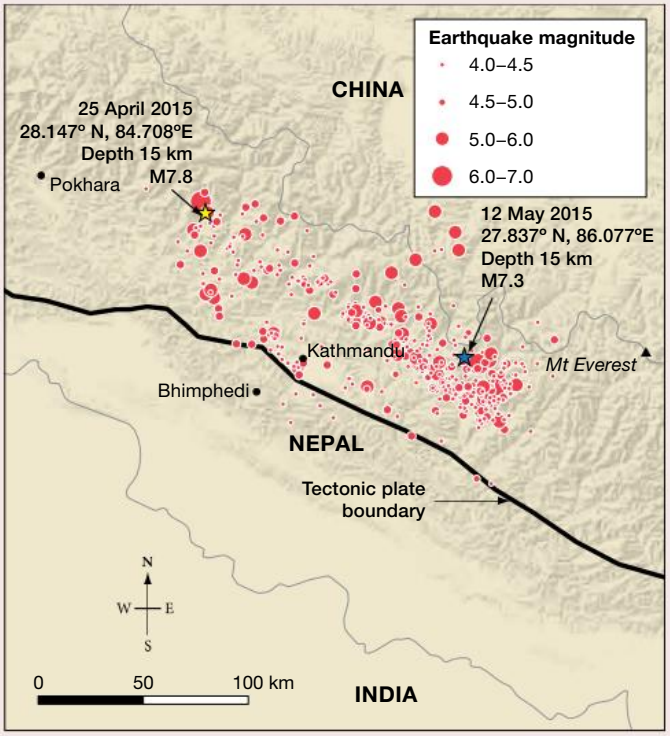
On 12 May 2015, a huge aftershock with a magnitude of 7.3 occurred near the Chinese border with Nepal (between Kathmandu and Mount Everest). More than 160 people died and more than 2500 were injured as a result of this aftershock.

FIGURE 4 The shake intensity and the tectonic plate boundary involved in the Nepal earthquake



Source: USGS

FIGURE 5 Magnitudes of earthquake and aftershocks in Nepal, 2015



Source: USGS

CASE STUDY

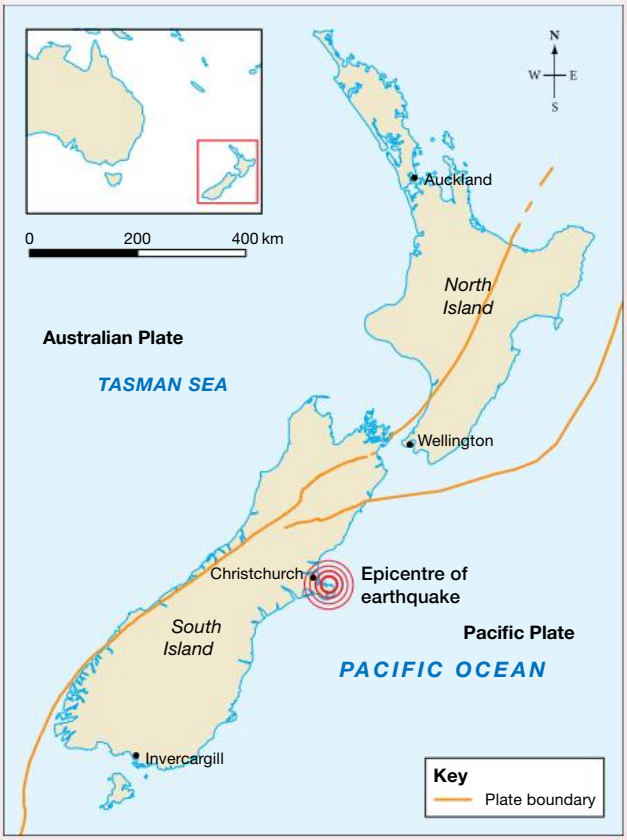
What caused the 2011 earthquake in Christchurch, New Zealand?

A 6.3-magnitude earthquake struck Christchurch, New Zealand, on 22 February 2011. The city was badly damaged, 185 people were killed and several thousand were injured. The earthquake epicentre was 10 kilometres south-east of Christchurch's central business district, and was quite shallow — only 5 kilometres deep — which meant the shaking was particularly destructive.

The earthquake was thought to be an aftershock of an earthquake that occurred 5 months earlier in September 2010. Many buildings in the city had already suffered damage in the 2010 earthquake and either collapsed in the 2011 earthquake or had to be demolished afterwards.

New Zealand is located between two huge moving plates — the Australian Plate and the Pacific Plate — and it experiences thousands of earthquakes every year. Most are very small, but some have caused a lot of damage. These movements continue to shape and form New Zealand and its dramatic mountain landscapes.

FIGURE 6 Location of the Christchurch earthquake in New Zealand, 2011



Source: Map drawn by Spatial Vision

FIGURE 7 Earthquake damage in Christchurch

SkillBuilder discussion

Geographical inquiry

1. Why is New Zealand so prone to earthquakes?
2. Explain why the impact of the 2011 earthquake was so severe.
3. List five steps a community in an earthquake prone region might take to reduce the impact of future earthquakes.

14.6 SkillBuilder activity **CONCLUDING AND DECISION-MAKING**

Evaluate and **discuss** the statement: 'The largest Earthquakes are always the most damaging'.

1. Work in pairs. Use the information in this lesson and **conduct research** on several earthquakes of varying intensity. Ensure you have several that were quite powerful.
2. Make notes on the extent of damage caused in each and then **compare** the information for different-sized earthquakes. You may like to draw up a table to help with this.
3. Use the information you've collected to agree, partially agree or disagree with the statement.
4. **Present** your conclusion and evidence to the class.

14.6 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 4, 5	2, 3, 7	6, 8, 9

REMEMBER AND UNDERSTAND

1. **Complete** the following statements by filling in the blanks.
   The point where the actual earthquake occurs under the surface is called the _____. The point directly above this on the Earth's surface is known as the _____. The shallower the earthquake, the more _____ the earthquake will be. Energy travels out from an earthquake in _____ _____. The strength of an earthquake can be measured on the R_____ S_____ and the M_____ M_____ S_____, but more often in recent times, seismologists use the M_____ M_____ S_____ .
2. **Explain** how an earthquake occurs. **Create** a diagram to assist your explanation.
3. **Explain** how primary waves differ from secondary waves of earthquakes.
4. The Richter scale measures earthquake magnitude. **Identify** how much more powerful is the magnitude of an earthquake at 7.0 than at 5.0.
   A. 2 times greater
   B. 10 times greater
   C. 100 times greater
   D. 1000 times greater
5. Study **FIGURE 5** and **determine** whether the following statements are True or False. If they are False, rewrite them to make them True.
   a. The earthquake and aftershocks were between 4.0 and 6.0 in magnitude.
   b. The furthest earthquake and aftershocks were 100 kilometres apart.
   c. The earthquake on 12 May was the same intensity as the earthquake on 25 April.
   d. Most of the aftershocks were felt to the east of the main earthquake on 25 April.

ANALYSE AND APPLY

6. Geophysicists and other experts have warned for decades that Nepal was vulnerable to a deadly earthquake. **Propose** reasons why Nepal wasn't prepared for this event.
7. Study **FIGURE 4**.
   a. **Identify** which direction the Indian Plate is moving in. **Determine** whether it is moving under or over the Eurasian Plate.
   b. **Describe** the location of the highest intensity shaking. **Determine** how close it was to the epicentre and to the tectonic plate boundary.

EVALUATE AND COMMUNICATE

8. **Discuss** whether the earthquake event in Nepal supports the idea that the Himalayas are a young mountain range that is still forming.
9. **Explain** why living with earthquakes is something all New Zealanders have to do. Think carefully about how New Zealanders have to adapt to life with earthquakes. **Describe** how school in Christchurch might be different to school in Australia as a result.

Answers and sample responses for this topic are available online.

LESSON 14.7 What is a tsunami?

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **investigate** the causes and spatial distribution of tsunamis
- **define** the key terms *landslide* and *tsunami*
- **explain** why tsunamis are different to other types of waves.

Tune in

FIGURE 1 shows a beach in Thailand in 2004. The water had rapidly receded out to sea, puzzling onlookers.

Moments later the devastating Indian Ocean tsunami hit the area, and many other locations, killing approximately 230 000 people.

Discuss why the water might first disappear from the beach right before a tsunami.

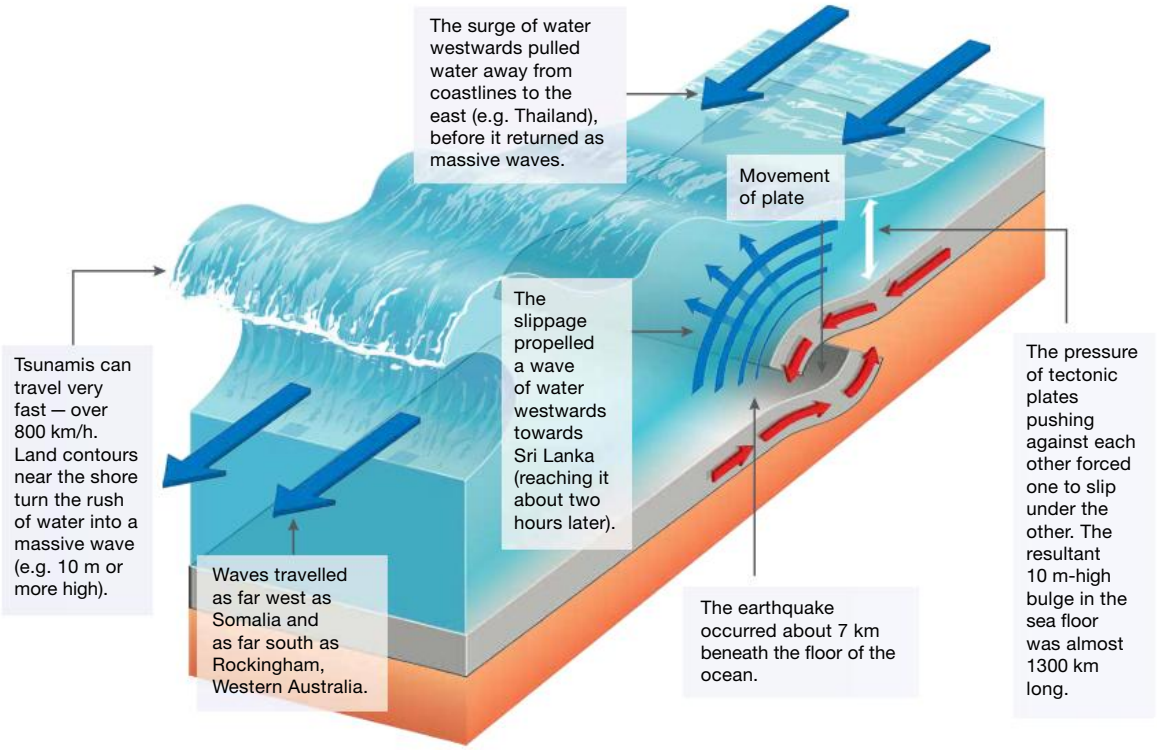
FIGURE 1 Hat Rai Lay Beach, Thailand, 26 December 2004

A tsunami is a large ocean wave caused by sudden motion on the ocean floor, such as an earthquake, a volcanic eruption or an underwater landslide. About 90 per cent of tsunamis occur in the Pacific Ocean, mostly due to earthquakes over 6.0 on the Richter scale.

At sea, tsunamis are almost undetectable because they travel extremely fast (about 970 km/h) with a wavelength of about 30 kilometres and a wave height of only 1 metre.

When tsunamis reach the continental slope, they slow down, wave height increases and wavelength decreases. The sea may recede quickly, indicating a tsunami is coming, and it's best to head to higher ground immediately. A tsunami consists of multiple waves arriving at intervals of between 10 minutes and 2 hours.

FIGURE 2 In 2004, an earthquake and subsequent tsunami in the Indian Ocean occurred along the boundary between tectonic plates.



SkillBuilder discussion

Geographical inquiry

1. Explain why the scale of the Indian Ocean tsunami in 2004 was so large.
2. Use a world map to measure the distance the tsunami travelled from the source.
3. Research the impact this tsunami had on life and property across nations with an Indian Ocean coastline.

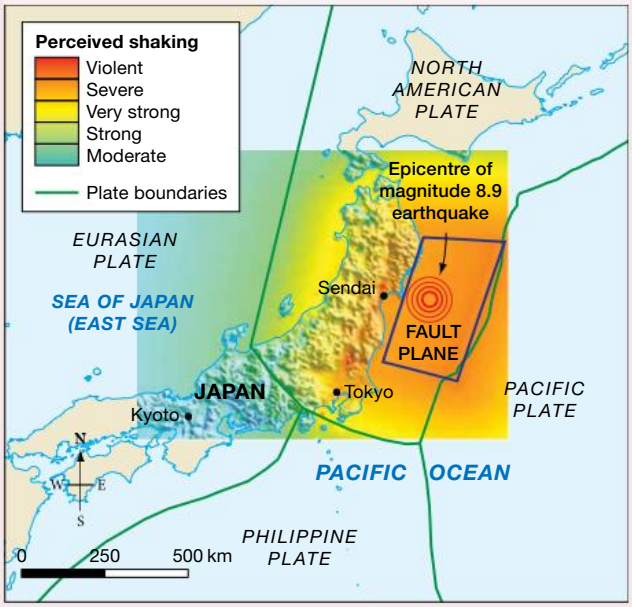
CASE STUDY

The Japanese tsunami, 2011

The region of Japan is seismically active because four plates meet there: the Eurasian, Philippine, Pacific and North American plates. Many landforms in this region are influenced by the collision of oceanic plates. Chains of volcanic islands called island arcs are formed, and an ocean trench is located parallel to the island arc (see **FIGURE 3** in lesson 14.2).

On 11 March 2011, an 8.9-magnitude earthquake struck near the coast of Japan. The earthquake was caused by movement between the Pacific Plate and the North American Plate. It occurred about 27 kilometres below the Earth's surface along the Japan Trench, where the Pacific Plate moves westwards at about 8 centimetres each year. The sudden upward movement released an enormous amount of energy and caused huge displacement of the sea water, causing the tsunamis. When the tsunamis reached the Japanese coast, waves more than six metres high moved huge amounts of water inland. 19 747 people were killed and more than 120 000 buildings were destroyed. The direct financial damage from the disaster is estimated to be about $199 billion (about 16.9 trillion yen), according to the Japanese government.

FIGURE 3 The location and magnitude of the earthquake that caused the Japanese tsunami



Source: Map drawn by Spatial Vision

FIGURE 4 The tsunami caused by the 8.9-magnitude earthquake in March 2011 swept over the coastline at Sukuiso and inland, carrying debris with it.

SkillBuilder discussion

Geographical inquiry

1. Refer to **FIGURE 4**. How would debris increase the damage from a tsunami?
2. Explain the issues the Japanese authorities would face in the aftermath of this disaster.
3. Discuss why trees in the top photo survived, yet the buildings around them were destroyed.

14.7 SkillBuilder activity CONCLUDING AND DECISION-MAKING

Use an atlas or Google Earth to locate Lituya Bay.

1. **Draw** a map to show the location.
2. Use the **World's biggest tsunami** weblink in the Resources panel to listen to eyewitness accounts of the tsunami that occurred there.
3. **Explain** how this helps give you a sense of the scale of this event.

14.7 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 6	2, 4, 7, 9	5, 8, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statements are True or False.
   a. Most tsunamis occur in the Atlantic Ocean.
   b. Underwater landslides can trigger tsunamis.
   c. In deep water, tsunamis can travel at up to 970 km/h and can be undetectable by boats.
   d. A tsunami is a single wave.
2. Study **FIGURE 2**. Use your own words to **explain** how a tsunami occurs.
3. **Determine** whether the following statement is True or False. A tsunami doesn't change when it comes into shallow water.
4. **Elaborate** why there is still danger after the first wave of a tsunami strikes.
5. Read the 14.7 case study and **explain** the causes of the 2011 Japanese tsunami.
6. **Identify** how big were the waves that struck Japan.
   A. 3 metres
   B. 6 metres
   C. 12 metres
   D. 20 metres

ANALYSE AND APPLY

7. Read through the 14.7 case study. **Discuss** how the location of the epicentre of the earthquake that caused the Japanese tsunami impacted the ability of people to prepare for the incoming tsunami.
8. Study **FIGURE 3**.
   a. **Estimate** the size of the fault plane that moved vertically during this quake.
   b. **Discuss** why this was significant.
   c. **State** which tectonic plates were involved in this event.
9. Study the photo of the Japanese tsunami in **FIGURE 4**.
   a. Imagine you are a radio news reporter. **Describe** what you see and what might be happening to people in the area.
   b. Imagine you were a Sendai resident. **Describe** what you would have done to ensure your safety during the tsunami.

EVALUATE AND COMMUNICATE

10. **Create** a flow chart or cartoon strip that explains the journey of a tsunami from creation through to coming ashore.

Answers and sample responses for this topic are available online.

LESSON 14.8 What are the impacts of earthquakes and tsunamis?

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **describe** the effects of earthquakes and tsunamis on people and the environment
- **explain** how the impacts of geomorphological hazards are shaped by social, cultural, and economic factors.

Tune in

The effects of earthquakes and tsunamis extend beyond the obvious physical destruction.

FIGURE 1 Kesennuma city centre after an 8.9-magnitude-strong earthquake and subsequent tsunamis struck on 11 March 2011

Examine **FIGURES 1** and **2** in pairs to create a mind map focusing on what you think might be the social, economic and environmental impacts of tsunamis and earthquakes.

FIGURE 2 This landslide was caused by an earthquake in June 2008 in Honshu, Japan.

Earthquakes and tsunamis can have an enormous impact. The degree of impact can be affected by several factors: the size of the quake, its location, the density of the population near the epicentre and whether there are any densely populated areas nearby. Poverty also plays a role, because it can increase a country's or region's vulnerability to such disasters. Measuring an event by the impact can be difficult. Should it be measured by the number of people killed and made homeless (social impact); the cost of recovery (economic impact) or the effect on the surroundings (environmental impact)?

14.8.1 Impact on people

The data in **FIGURE 3** shows some of the worst earthquake and tsunami disasters that have occurred in history. The amount of damage and death they cause does not always relate to the magnitude of the earthquake. Some smaller-magnitude earthquakes can have a devastating impact. Likewise, to measure the impact of a tsunami, we have to look at its effect on people — not at the magnitude of the earthquake (or volcano) that caused it, nor at the size of the waves, which are difficult to measure.

TABLE 1 Why natural disasters have bigger impacts in less developed nations

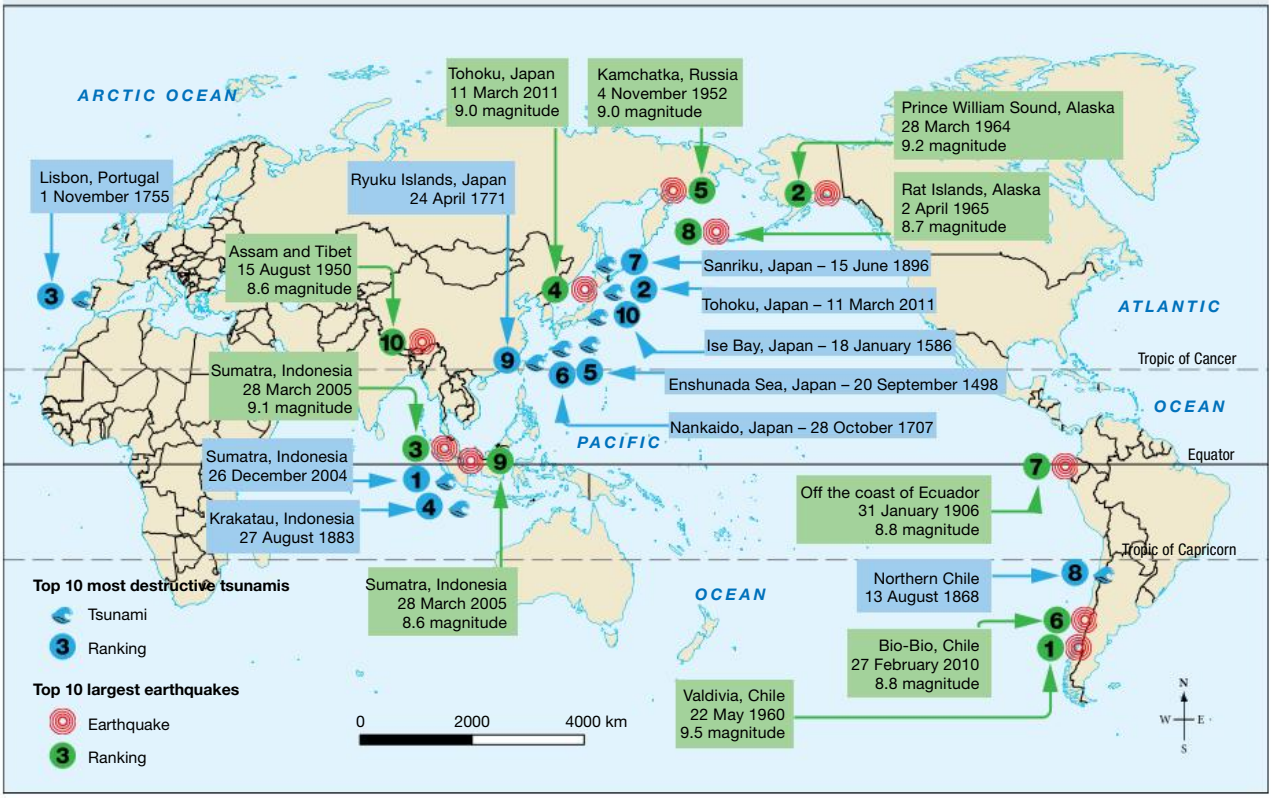
Less economically developed nation	More economically developed nation
• Lack of resources to prepare for a disaster • Poorly constructed buildings are more common • Higher population density on poor (often low-lying) land • Less money to organise relief efforts • Less infrastructure to deal with a relocated population and likely medical needs • Less financial resources to help in the post-disaster period	• Better building codes to help ensure less damage from earthquakes • More comprehensive warning systems • Organisations like NEMA (National Emergency Management Agency) in Australia and FEMA (Federal Emergency Management Agency) in the United States of America with better resources • Better health infrastructure • More financially able to offer support to those affected

Analysis of EM-DAT (The International Disaster Database) data also shows how income levels have an impact on disaster death tolls. On average, more than three times as many people died per disaster in low-income countries (332 deaths) than in high-income countries (105 deaths). A similar pattern is evident when low- and lower-middle-income countries are grouped together and compared to high- and upper-middle-income countries. Taken together, higher-income countries experienced 56 per cent of disasters but lost 32 per cent of lives, while lower-income countries experienced 44 per cent of disasters but suffered 68 per cent of the deaths. This demonstrates that levels of economic development, rather than exposure to hazards, are major determinants of mortality.

14.8.2 Impact on the natural environment

The impact of an earthquake or tsunami on a natural environment can be catastrophic. Sea water can impact forest environments. **Landslides** can be triggered by earthquakes, permanently changing the landscape, and freshwater ecosystems can be inundated by sea water as a result of tsunamis.

FIGURE 3 The 10 largest earthquakes and 10 most destructive tsunamis in recorded history



Source: Map drawn by Spatial Vision

SkillBuilder discussion

Geographical inquiry

1. Identify and list the five largest earthquakes.
2. Identify and list the five most destructive tsunamis.
3. Choose one earthquake and one tsunami from your responses to questions 1 and 2 and research these events. Provide an outline of the economic, social and environmental impact of your chosen disasters.

Liquefaction

Liquefaction occurs when soil suddenly loses strength and, mixed with groundwater, behaves like a liquid. This usually occurs as a result of ground shaking during a large earthquake. The types of soils that can liquefy include loose sands and silts that are below the water table, so all the space between the grains is filled with water. Dry soils above the water table will not liquefy.

Once a soil liquefies, it cannot support the weight of the dry soil, roads, concrete floors and buildings above it. The liquefied soil comes to the surface through cracks, which it widens.

FIGURE 4 Cars swallowed by liquefied soil on a road in Christchurch, New Zealand, 2011

Source: © Photography by Mark Lincoln

14.8 SkillBuilder activity COMMUNICATING

Compare two case studies of recent earthquakes or tsunamis (e.g. Japan 2011 tsunami and Türkiye–Syria earthquakes in, 2023)

1. In pairs or small groups, complete a table with the following columns:

Country/event	Impact on people and places	Social, cultural, economic factors

2. Discuss ways in which wealth, building codes, emergency responses, or population density affected outcomes.

14.8 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4	6, 7, 8

REMEMBER AND UNDERSTAND

1. **Complete** the following passage by filling in the blanks.
   The amount of damage and death caused by earthquake disasters does not always relate to the _____ of the earthquake. Likewise, to measure the impact of a tsunami, we have to look at its effect on _____, not at the size of the earthquake nor _____ that caused it, nor the size of the _____, which can be difficult to measure. Less _____ countries often do not have the _____ to prepare adequately for an earthquake. Badly constructed _____ in densely _____ areas on poor land contribute to the scale of the disaster.
2. **Select** all factors that combine to turn a tsunami or earthquake into a disaster.
   A. A country's lack of resources
   B. Sparsely populated areas
   C. Poorly constructed buildings
   D. Strong infrastructure
   E. Densely populated areas
   F. Well-constructed buildings
3. **Explain** why wealthier nations are less likely to experience large-scale disasters.
4. **State** the different impacts that earthquakes can have.
5. Examine **FIGURE 3. Determine** if the following statements are True or False.
   a. The majority of large tsunamis occur in the Pacific Ocean.
   b. Tsunami waves have impacted Australia regularly.
   c. Japan is the country most affected by tsunamis.
   d. Europe is less likely to experience major earthquakes over 8.5 on the Richter scale.
   e. The largest earthquake recorded was in Valdivia, Chile, at 9.5 on the Richter scale.
   f. Africa has been repeatedly hit by both major earthquakes and tsunamis.

ANALYSE AND APPLY

6. Study **FIGURE 3** in this lesson and **FIGURE 1** in lesson 14.2.
   Describe the interconnection between the distribution of earthquakes and the distribution of tectonic plates.

EVALUATE AND COMMUNICATE

7. **Explain** why Japan might experience so many destructive earthquakes and tsunamis.
8. **Explain** why the potential damaging effects of liquefaction might impact the ways in which cities expand.

Answers and sample responses for this topic are available online.

LESSON 14.9 What are volcanoes and how are they formed?

LEARNING INTENTION

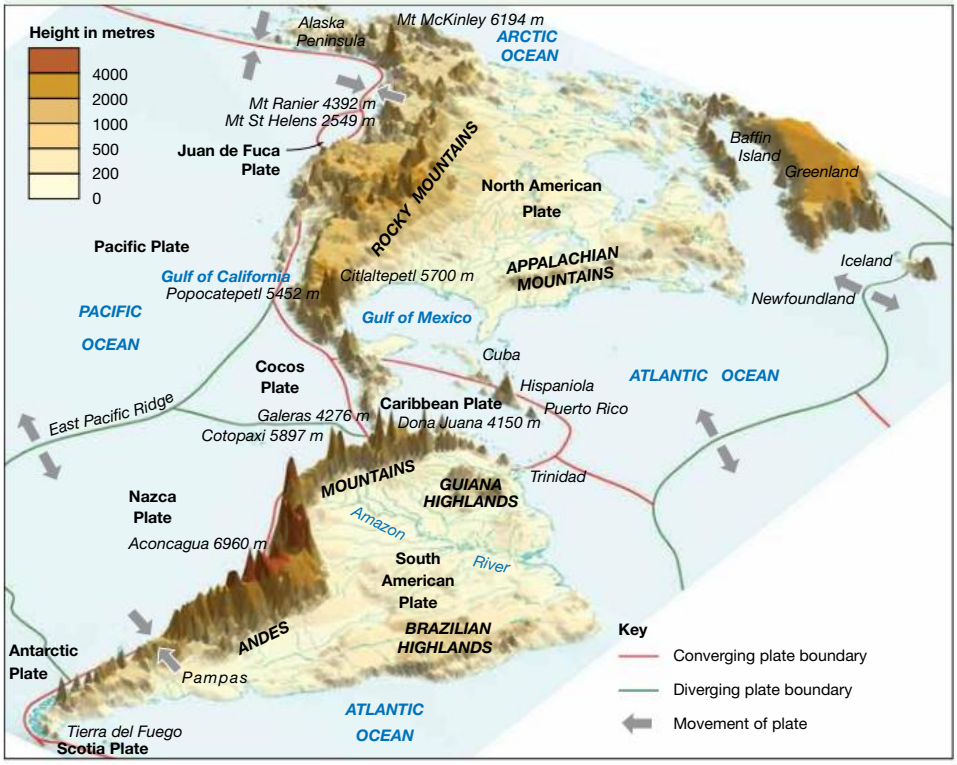
By the end of this lesson, you should be able to:

- **identify** the processes that produce volcanoes and volcanic eruptions
- **explain** the term *volcanic hotspot*.

Tune in

Compare **FIGURE 1**, which focuses on the landforms of North, Central and South America, with **FIGURE 3** in lesson 14.2, which shows a world map of plates, volcanoes and hotspots.

FIGURE 1 Landforms of North, Central and South America (not to scale)



Source: Map drawn by MAPgraphics Pty Ltd, Brisbane

1. **Describe the spatial association between mountain ranges and volcanoes.**
2. **What is happening to the tectonic plates at these boundaries?**
3. **Propose why some mountain ranges do not have volcanoes present.**

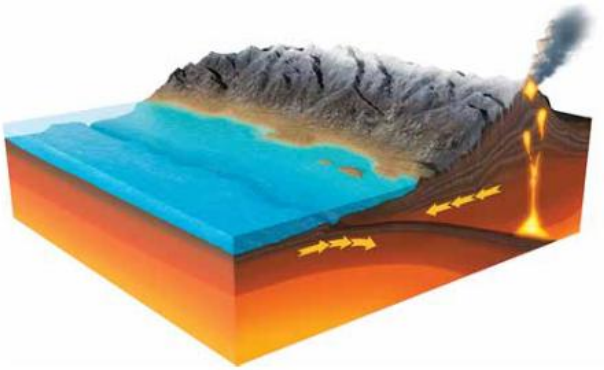
14.9.1 How are volcanoes formed?

A volcano is a cone-shaped hill or mountain formed when molten magma in the Earth's mantle is forced through an opening or vent in the lithosphere. Almost all active volcanoes occur at or near plate boundaries. Some occur where two plates converge, and others occur where the plates are pulling apart, or diverging (see **FIGURE 1**). There is another group of volcanoes that are formed when plates move over hotspots.

Subduction zones

Some volcanoes are formed when an oceanic plate is pulled underneath a continental plate (see lesson 14.2). As the crust is forced down, it heats up and becomes magma. It can then rise to the Earth's surface through a magma chamber.

FIGURE 2 A subduction zone occurs where an oceanic plate is pulled under a continental plate.



Volcanoes in rift zones

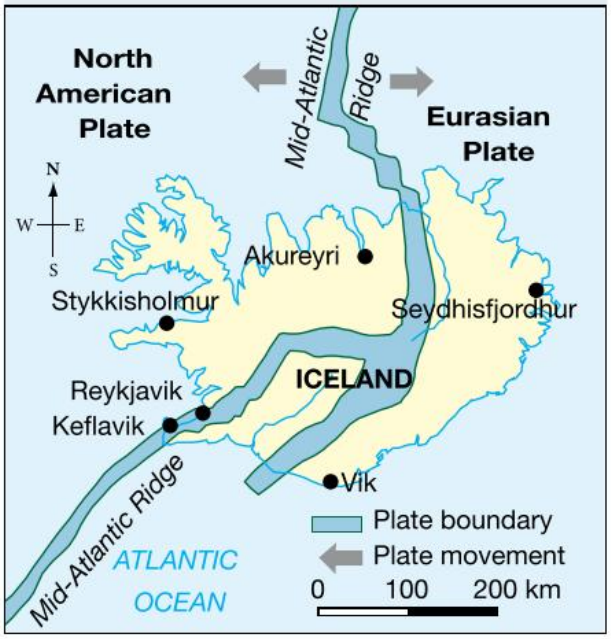
The longest mountain range in the world is underwater, between the African and American continents, and is 16 000 kilometres long. It is called the Mid-Atlantic Ridge, and is made up of many volcanic mountains. The volcanoes are formed where two plates move away from each other in **rift zones**. The molten lava rises to the surface in the space between the plates, and the largest volcanoes appear above the water as islands. Examples of rift islands are Iceland, the Azores, Ascension Island, Gough Island and Bouvet Island. The rifting, or spreading apart, can occur on land or on the seabed.

SkillBuilder discussion

Geographical inquiry

1. Look at **FIGURE 3**. Identify the two plates involved in the formation of Iceland.
2. Describe what is happening at this plate boundary (fault).
3. Which population centres in Iceland may be at risk as a result of volcanic activity?

FIGURE 3 Rifting in Iceland



Source: Map drawn by MAPgraphics Pty Ltd, Brisbane

The rifting of Iceland

The Mid-Atlantic Ridge passes through Iceland, where the island is splitting in two different areas (see **FIGURE 3**). This can be seen where Iceland's volcanoes are located, at the point where the North American Plate is drifting to the west and the Eurasian Plate is drifting to the east (see **FIGURE 4**). New crust is being formed in a rift below the sea, and eventually water from the Atlantic Ocean will fill the widening and deepening gaps between the separated parcels of land.

FIGURE 4 A volcanic fissure in Iceland

The Great Rift Valley, Africa

The Great Rift Valley is in Africa (see **FIGURE 5**) is about 5000 kilometres long, and stretches from Syria in the north to Mozambique in the south. The valley varies in width from 30 kilometres at its narrowest point to 100 kilometres at its widest. In some places it is a few hundred metres deep; in others it can be a few thousand metres deep.

The Great Rift Valley was created through separation that began 35 million years ago, when the African and Arabian plates began pulling apart in the northern region. About 15 million years ago, east Africa began to separate from the rest of Africa along the East African Rift. The volcanic activity in this region has produced many volcanic mountains, such as Mount Kilimanjaro, Mount Kenya and Mount Elgon.

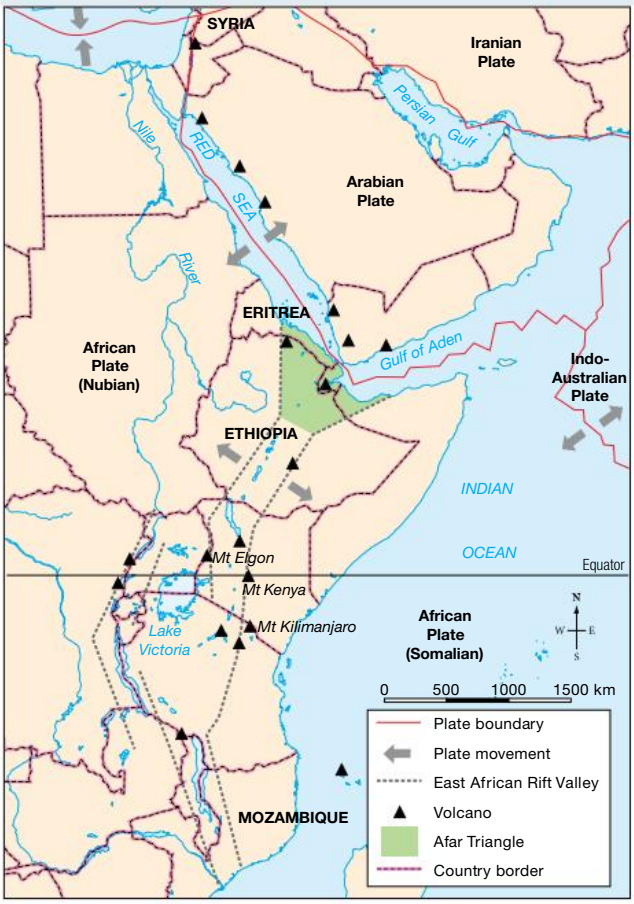
As these rifts continue to grow, new ocean waters will flow into the valleys, separating the landmasses.

SkillBuilder discussion

Geographical inquiry

1. Identify the tectonic plates involved in the formation of the Great Rift Valley.
2. Describe why this valley has formed.
3. **Draw** a series of sketches to show what you predict will happen to the African landmass as the Great Rift Valley continues to rift. Include a map of Africa showing the change in shape that might occur. You need to **annotate** your sketches to justify the predictions you have made.

FIGURE 5 The Great Rift Valley, Africa



Source: Map drawn by MAPgraphics Pty Ltd, Brisbane

14.9.2 Volcanic hotspots

Although most volcanoes are formed on plate boundaries, some are located in the middle of plates, a long way from plate boundaries. These volcanoes have formed above a hotspot — a single plume of rising mantle. Volcanoes form as the plates slowly move over the hotspot and, over time, a chain of volcanoes can form. Hotspots are found in the ocean and on continents. Examples include the Hawaiian Islands and many of Australia's extinct volcanoes. In Hawai'i, the location of the volcanic islands gives a clue to the direction and speed of the plate movement.

14.9 SkillBuilder activity **COMMUNICATING**

1. Summarise the information that you have learnt about volcanoes.
2. **Explain** what you know about Hawai'i's hotspot. Complete some research of your own to provide some key facts on this location.
3. Using your notes, **explain** how hotspot volcanoes form.

14.9 Exercise

learnon

Learning pathways

Level 1	Level 2	Level 3
1, 2, 5	3, 4, 7	6, 8, 9

REMEMBER AND UNDERSTAND

1. Almost all volcanoes are found:
   - **A.** near plate boundaries.
   - **B.** near the ocean.
   - **C.** exclusively near subduction zones.
   - **D.** in Asia.
2. Iceland has formed:
   - **A.** where a subduction zone has led to significant volcanic activity.
   - **B.** where two plates are drifting apart.
   - **C.** as a result of earthquakes pushing the crust above the ocean.
   - **D.** where two landmasses have been pushed together to form an island.
3. Study the shape of the island of Madagascar shown in **FIGURE 6**. Try to imagine fitting this island back into the mainland. Using plate tectonic terms, write a paragraph to **describe** how Madagascar's location has changed over time.

FIGURE 6 The south of Africa, showing the location of Madagascar

4. **Describe** the changes occurring that are causing volcanoes to form in:
   a. the Great Rift Valley
   b. Iceland.
5. **Determine** whether the following statement is True or False. Very few active volcanoes occur at or near plate boundaries.

ANALYSE AND APPLY

6. **Explain** how the scale of the changes happening in Iceland is different from the scale of change happening in the Great Rift Valley.
7. **Discuss** how hotspots lead to volcanic activity. Use examples in your analysis.
8. **Explain** why a volcanic eruption like the one in **FIGURE 4** forms in Iceland. **Deduce** what is happening to the plates.
9. **Draw** what you imagine Iceland will look like many thousands of years in the future after further rifting. Provide new names for each of the smaller islands. **Determine** in which direction, and towards which continent, each island will drift. **Describe** key changes.

Answers and sample responses for this topic are available online.

LESSON 14.10 Investigating topographic maps – Mount Taranaki, New Zealand

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **investigate** Mount Taranaki in New Zealand and **interpret** a topographic map
- **use** grid references to pinpoint locations on a map.

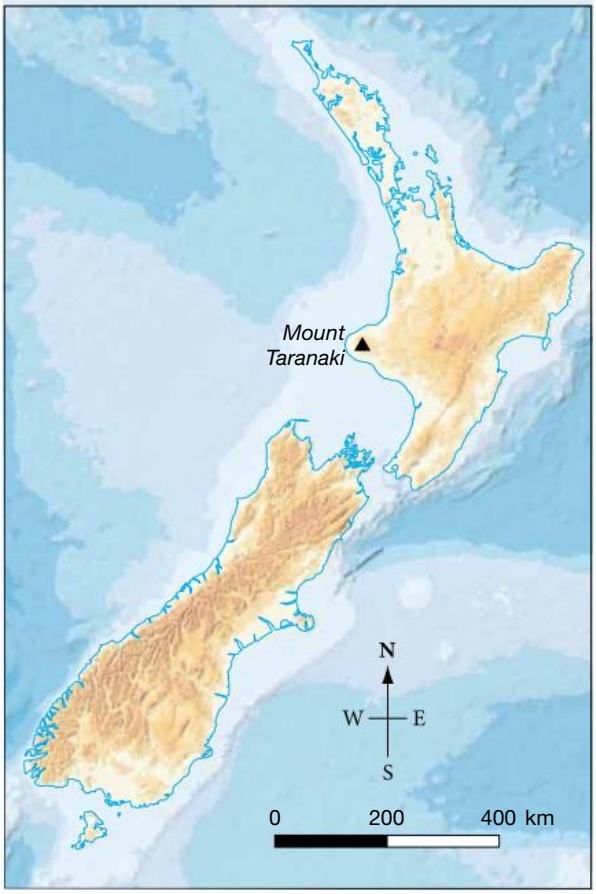
New Zealand's Mount Taranaki is named after the Māori terms *tara*, meaning 'mountain peak', and *ngaki*, meaning 'shining' (because the mountain is covered with snow in winter).

Mount Taranaki is 2518 metres high and is the largest volcano on New Zealand's mainland. It is located in the south-west of the North Island (see **FIGURE 1**).

Mount Taranaki was formed 135 000 years ago by subduction of the Pacific Plate below the Australian Plate. It is a stratovolcano (composite cone) — a conical volcano consisting of layers of pumice, lava, ash and tephra. Mount Taranaki is symmetrical, looking the same on both sides of a central point. It is the only active volcano in a chain in this region. The other volcanoes were once very large but have been eroded over time.

The summit of Mount Taranaki is a lava dome in the middle of a crater that is filled with ice and snow. The mountain is considered likely to erupt again. There are significant potential hazards from lahars (mudflows containing volcanic debris), avalanches and floods. A circular plain of volcanic material surrounding the mountain was formed by lahars (see **FIGURE 3**) and landslides. In the past, some of these flows reached the coast. The volcano's lower flanks are covered in forest and are part of the national park. There is a clear line between the park boundary and surrounding farmland.

FIGURE 1 Location of Mount Taranaki on the North Island of New Zealand



Source: Map drawn by Spatial Vision

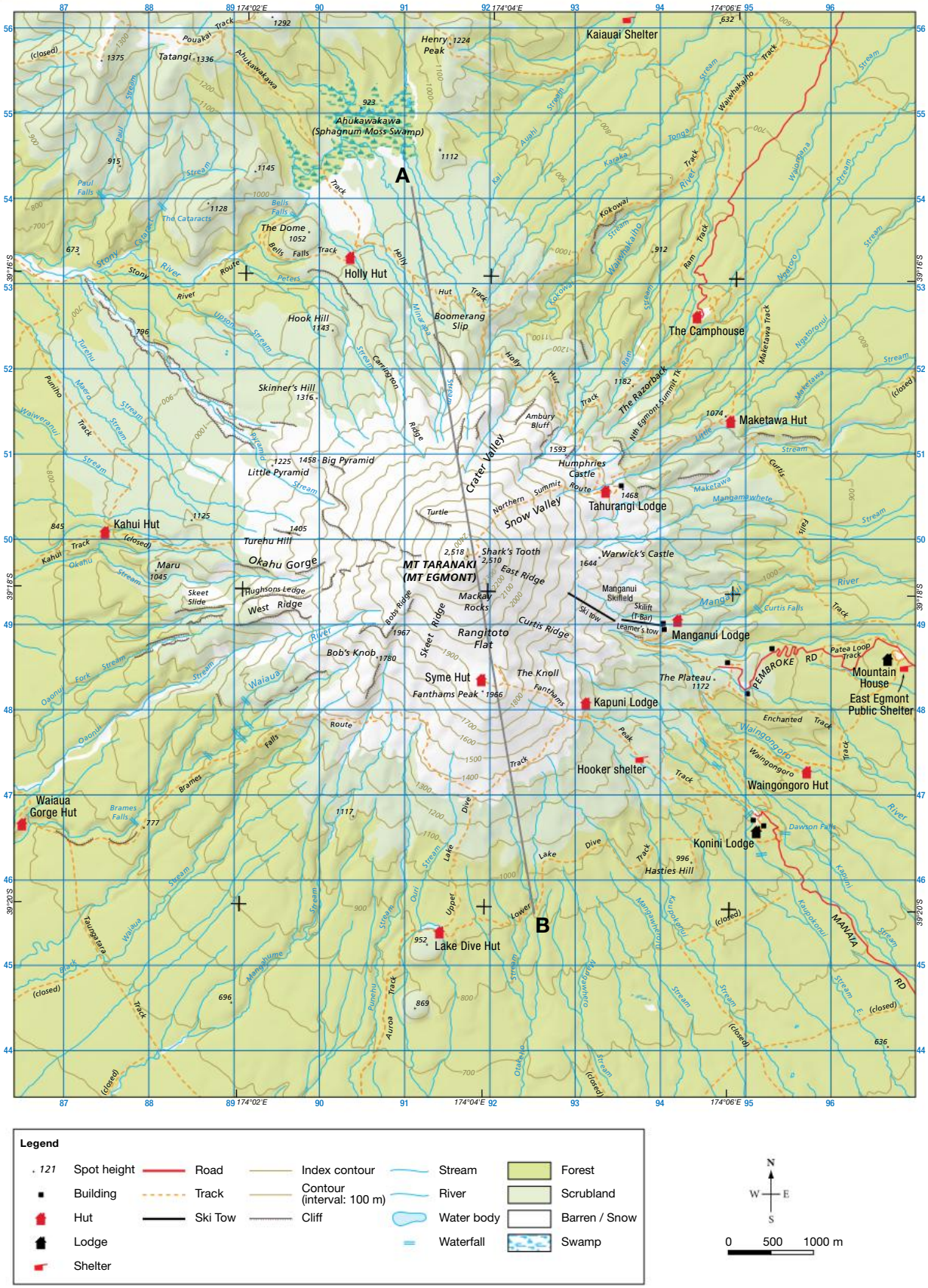
SkillBuilder discussion

Geographical inquiry

1. Describe evidence from the aerial photo in **FIGURE 2** that the national park has protected forests around the volcano.
2. Predict what may happen to the ice and snow if Mount Taranaki became active again.
3. Explain how previous eruptions have impacted the surrounding area.

FIGURE 2 Aerial photo of Mount Taranaki

FIGURE 3 Topographic map of Mount Taranaki



Source: LINZ Data Service. License: Creative Commons Attribution 3.0 New Zealand https://data.linz.govt.nz/license/attribution-3-0-new-zealand/. Map drawn by Spatial Vision.

FIGURE 4 Mount Taranaki has a near-perfect conical shape.

14.10 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 5	2, 4	3, 6

1. Mount Taranaki is located in the **east** / **south-west** / **north** / **south-east** / **south** / **west** of the **East** / **South-west** / **North** / **South-east** / **South** / **West** island of New Zealand.
2. **Explain** how Mount Taranaki formed.
3. Mount Taranaki receives between 3200 millimetres and 6400 millimetres of rainfall each year. **Explain** how this would contribute to the shape of this landform.
4. Refer to **FIGURE 3**.
   a. **State** the grid reference for the spot height of Mount Taranaki.
   b. **Calculate** the number of huts and lodges.
   c. **State** the area reference of the Manganui ski field.
   d. **State** the highest elevation shown on the map.
   e. **Name** and give the grid reference of a lodge in which skiers could stay.
   f. **State** the area reference for the largest portion of swampland.
5. a. Use **FIGURES 2**, **3** and **4** to describe where you think lava would flow if Mount Taranaki erupted.
   b. **Describe** the potential changes to the human and natural environment.
6. How might people use the land around Mount Taranaki? Provide supporting evidence for your answer.

Answers and sample responses for this topic are available online.

LESSON 14.11 What are the types of volcanoes and how do they erupt?

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **describe** the different types of volcanic landforms
- **explain** why volcanoes have different shapes and how they erupt.

Tune in

Look closely at **FIGURE 1**. In the area around the erupting volcano, you can see the lights of a built-up area.

FIGURE 1 An erupting volcano in Spain

1. **Suggest why people would be living so close to an erupting volcano.**
2. **Describe what you can see being erupted. What impact might it have on the surrounding land?**

Volcanic mountains are formed when magma pushes its way to the Earth's surface and then erupts as lava, ash, rocks and volcanic gases. These materials build up around the vent through which they erupt.

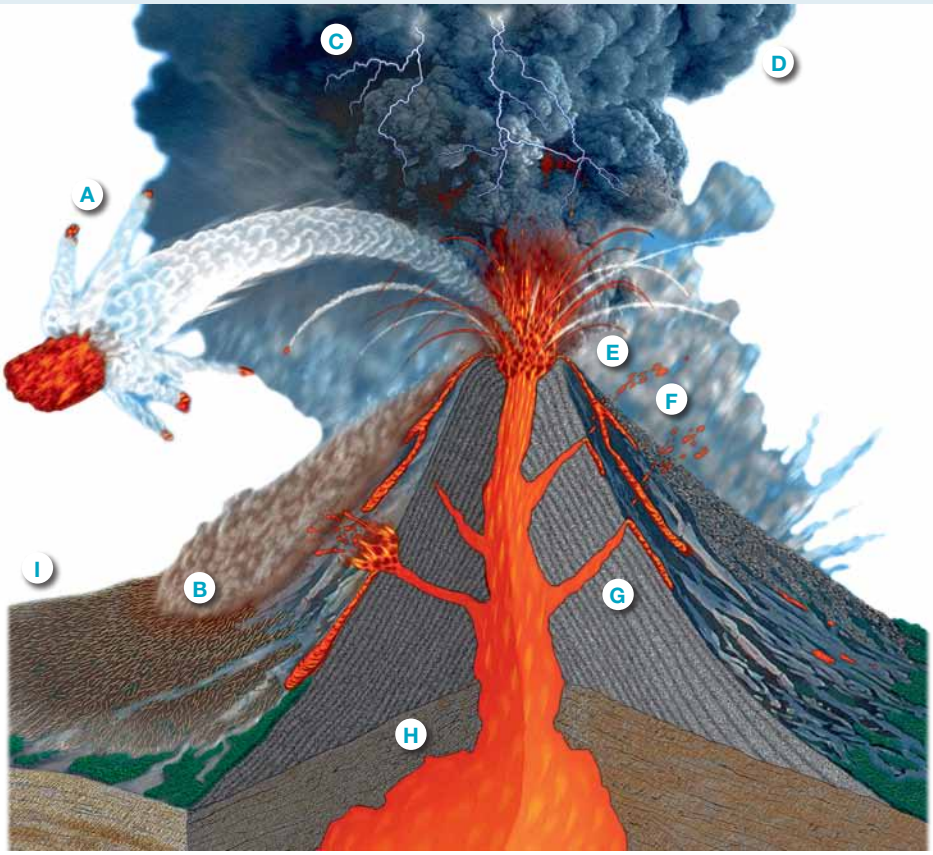
A volcanic eruption can be slow or spectacular, and can erupt in a variety of different ways (see **FIGURE 1**).

SkillBuilder discussion

Geographical inquiry

1. Describe the different types of materials that can be erupted from a volcano.
2. Evaluate which type of eruption would be the most dangerous.
3. Explain why lahars would be linked to ice-covered volcanic peaks.

FIGURE 2 The anatomy of a volcano



A A fragment of lava greater than 64 millimetres in diameter is called a volcanic bomb. They are often solid pieces of lava from past eruptions that formed part of the cone.

B A pyroclastic flow is a superheated avalanche of rock, ash and lava that rushes down the mountain with devastating effects. The flow can travel at up to 240 kilometres per hour and reach temperatures of 800 °C. When Mount Pelée erupted in 1902, on the island of Martinique in the Caribbean, a pyroclastic flow covered the town of Saint-Pierre, killing all but two of the town's 30 000 inhabitants.

C Lightning is often generated by the friction of swirling ash particles.

D As rock is pulverised by the force of the eruption, it becomes very fine ash, and is carried by wind away from the crater as an ash cloud. Volcanic ash may blanket the ground to a depth of many metres. In the eruption of Mount Vesuvius in 79 CE, volcanic ash completely covered two large towns: Pompeii and Herculaneum.

E A volcanic cone is made up of layers of ash and lava from previous eruptions. If the volcano has not erupted for thousands of years (i.e. is dormant), these layers will be eroded away.

F Lava may be either runny or viscous, and can flow for many kilometres before it solidifies, thereby building up the Earth's surface.

G Pressure may force magma through a branch pipe or side vent. In the eruption of Mount St Helens in Washington in the United States, in the 1980s, the side of the mountain collapsed and the side vent became the main vent.

H Where two plates move apart, molten rock from the mantle flows upward into a magma chamber. More rock is melted and erupts violently upwards. Magma is generally within the temperature range of 700 – 1300 °C.

I When pyroclastic flows melt snow and ice, and mix with rocks and stones, a very wet mixture called lahar can form. Lahars can flow quickly down the sides of volcanoes and cause much damage. One lahar that formed in 1985 on the Nevado del Ruiz volcano in Colombia travelled at up to 50 kilometres per hour and was up to 40 metres high in some places. A wall of mud, water and debris travelled 73 kilometres to the town of Armero, devastating it. More than 23 000 people died that night and 5000 homes were destroyed.

14.11.1 Volcanic shapes

Volcanoes come in a variety of shapes and sizes, forming different landforms. There are four main types and each depends on:

- the type of lava that erupts
- the amount and type of ash that erupts
- the combination of lava and ash.

Lava rich in silica is thick and slow-moving, while low-silica lava is runny and can flow for many kilometres. Shield volcanoes have broad, flat sides due to runny lava, whereas dome volcanoes have steep sides from thick lava.

Heavy ash, like volcanic bombs, settles near the crater, while lighter ash travels further. Cinder cones are steep-sided volcanoes formed from ash falls. Volcanic ash, made of rock, mineral and glass particles, is very hard and can collapse roofs. It also poses a risk to jet engines, often causing flight diversions.

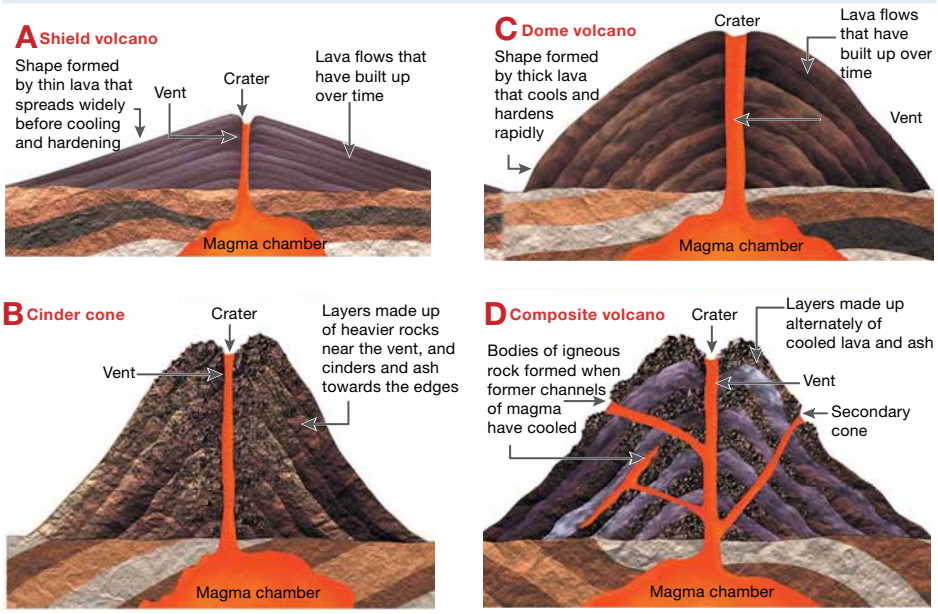
Composite volcanoes, the most common type, are built from both ash and lava.

SkillBuilder discussion

Geographical inquiry

1. Identify which types of volcanoes only produce lava eruptions.
2. Explain the difference between a composite volcano and a cinder cone.
3. Rank each of the types of volcanoes listed above from most dangerous to least dangerous. Justify your response.

FIGURE 3 Four volcanic landforms



14.11 SkillBuilder activity **COMMUNICATING**

1. **Conduct research** to find pictures of volcanic landforms and materials. These include crater lakes, geysers, calderas, fields of ash deposits, volcanic plugs, lava tubes, hummocks and pumice. You could also find pictures of the two types of lava: aa and pahoehoe.
2. Use your pictures to **create** a field guide to volcanic landforms. Each page should contain a picture of the landform, a brief description and a place where it can be found — sometimes they are tourist attractions.

14.11 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 4, 5	2, 3, 6	7, 8, 9, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statements are True or False.
   a. Volcanoes can erupt ash, gas and magma in the same eruption.
   b. The type of lava that erupts from a volcano can determine the shape of the cone.
   c. Volcanic bombs are blocks of magma so full of sulphur dioxide that they 'explode' when they hit the ground.
   d. A composite volcano is made up of both lava and ice.
   e. Lightning can be generated by the friction in volcanic ash.
2. a. **Define** pyroclastic flow.
   b. **Explain** why this type of volcanic hazard is so dangerous.
3. **Explain** how a volcanic cone develops.
4. Study **FIGURE 3**. Match each volcano to its description to **explain** how the shape of volcanoes depends on the different materials being ejected.
   i. Shield volcano
   ii. Composite volcano
   iii. Dome volcano
   iv. Cinder cone
      a. Thin lava spreads over a wide area before cooling.
      b. This is made up of alternate layers of cooled lava (forming areas of igneous rock) and ash.
      c. Layers of rock built up near the vent and the outer part of the volcano are made up of cinders and ash.
      d. This is formed by different layers of thick lava that cool and harden quickly.
5. **Explain** what is a stratovolcano.
   A. A volcano made up of layers of pumice, lava, ash and tephra
   B. A volcano created from passing over a hotspot
   C. A volcano made up of blocks of pumice and ash
   D. A volcano covered in snow and ice
6. a. **Define** *lahar*. **Explain** why they can impact areas many kilometres away from the volcano.

ANALYSE AND APPLY

7. a. **Discuss** how volcanic ash is different from the ash in a fireplace. **Explain** the implications of this when ash builds up on rooftops.
   b. **Explain** why volcanic ash is usually considered more dangerous than lava.
8. Refer to **FIGURES 1** and **2**.
   a. **Describe**, in detail, the changes to the environment that volcanic eruptions can cause.
   b. **Identify** which changes would impact on a small scale and which would impact on a larger scale.
9. **Propose** how you might prepare a hazard map for a volcano. **Explain** what you would have to take into account.
10. **Explain** why the relative size of a magma chamber is potentially significant.

Answers and sample responses for this topic are available online.

LESSON 14.12 How do volcanic eruptions affect people?

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **describe** the impact of volcanoes on people and the environment
- **identify** strategies to reduce the impact of a volcanic eruption.

Tune in

Volcanoes can have devastating impacts on the environment and the population.

FIGURE 1 Eyjafjallajökull eruption, Iceland

In pairs or small groups, complete the following tasks.

1. **Make a list of all the risks associated with living near volcanoes.**
2. **Discuss reasons why people might want to live near volcanoes.**
3. **Under what conditions do you think it might be worth the risk of living near a volcano?**

Share your responses with the class.

14.12.1 The worst volcanic eruptions

Volcanic eruptions both create and destroy landscapes. Most volcanic eruptions do not strike randomly but occur in specific areas, such as along plate boundaries. In some places there are high concentrations of people living near volcanoes.

Most of the world's active above-sea volcanoes are located near convergent plate boundaries where subduction is occurring, particularly around the Pacific Basin. This is also the location of settlements across many countries. Over many years, volcanic eruptions have caused deaths and great damage.

How can the worst volcano eruptions be measured? Should it be based on the number of people killed or the cost of the damage and destruction? Or should it be the size of the explosion?

TABLE 1 The worst volcano eruptions based on the number of deaths

Volcano	Location	Date	Number of deaths	Main volcanic impacts
Mt Tambora	Indonesia	5–10 April 1815	71 000+	Pyroclastic flow Volcanic ash
Mt Pelee	West Indies	25 April–8 May 1902	30 000	Pyroclastic flow
Mt Krakatoa	Indonesia	26–28 August 1883	36 000+	Tsunami
Nevado del Ruiz	Colombia	13 November 1985	23 000	Lahars
Mt Unzen	Japan	1792	12 000–15 000	Landslide Tsunami
Mt Vesuvius	Italy	24 April 79 CE	13 000+	Pyroclastic flow Volcanic ash
Laki Volcanic System	Iceland	8 June 1783–February 1784	9350	Volcanic gases (Flourine and sulphur dioxide)
Mt Kelud	Indonesia	1586	10 000	Lahars
Mt Kelud	Indonesia	19 May 1919	5110	Lahars

Source: EM-DAT, CRED / UCLouvain, Brussels, Belgium, www.emdat.be (D. Guha-Sapir), 14 April 2020 version

TABLE 2 The worst volcano eruptions based on economic impact

Volcano	Location	Date	Estimated loss (million US$)
Nevado del Ruiz	Colombia	1985	1000
Mount St Helens	USA	1980	860
Calbuco	Chile	2015	600
Mount Pinatubo	Philippines	1991	211
Galunggung	Indonesia	1982	160
Tungurahua	Ecuador	2006	150
Gamalama	Indonesia	1983	149
El Chichon	Mexico	1982	117
Rabaul	Papua New Guinea	1994	110
Puyehue-Cordon Caulle	Chile	2011	104

Source: EM-DAT, CRED / UCLouvain, Brussels, Belgium, www.emdat.be (D. Guha-Sapir), 14 April 2020 version.

14.12.2 Why do people live near volcanoes?

Geoscience Australia (a national organisation that provides geographic information to the government) estimates that 180 million people in the Asia–Pacific region live within 50 kilometres of a dangerous volcano. There is also a strong relationship between the location of volcanoes and resources such as fertile soils, ore deposits and **geothermal energy**.

Fertile soils

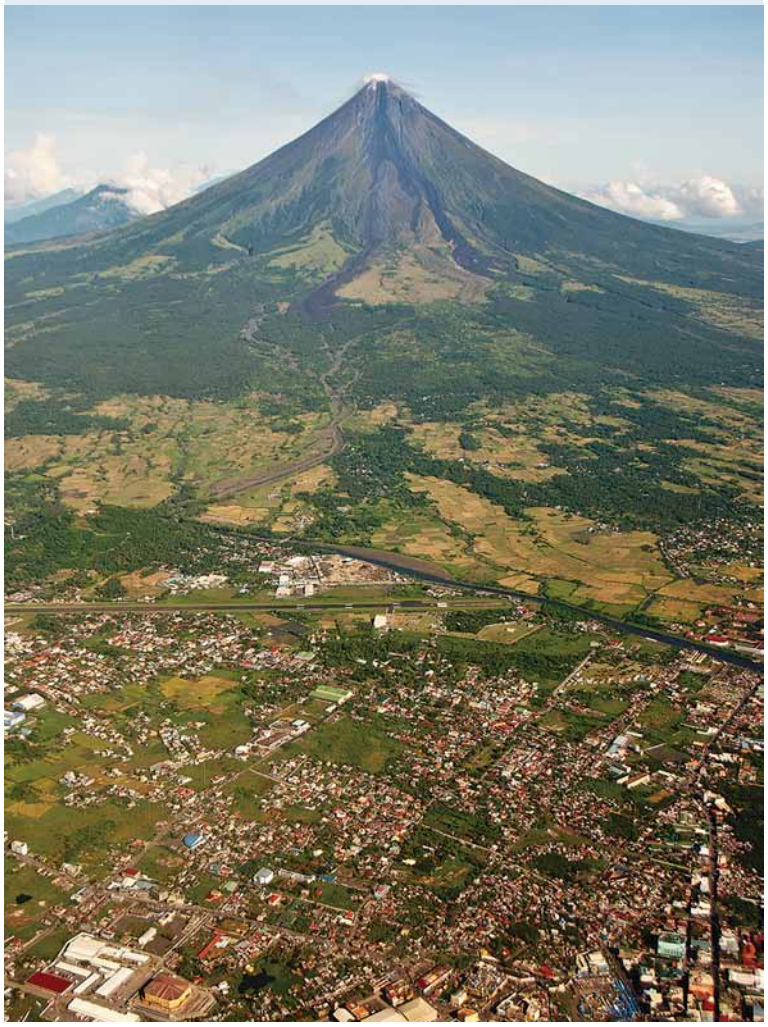
Some of the most fertile soils on Earth have come from volcanic deposits of ash that is rich in nutrients, and from the physical breakdown of volcanic rocks over thousands or millions of years.

SkillBuilder discussion

Geographical inquiry

1. Explain the risks associated with living so close to an active volcano.
2. Discuss the benefits of living in the town pictured in **FIGURE 2**.
3. Evaluate whether the risks outweigh the rewards of living near volcanoes.

FIGURE 2 Agriculture and settlement near Mayon Volcano in the Philippines



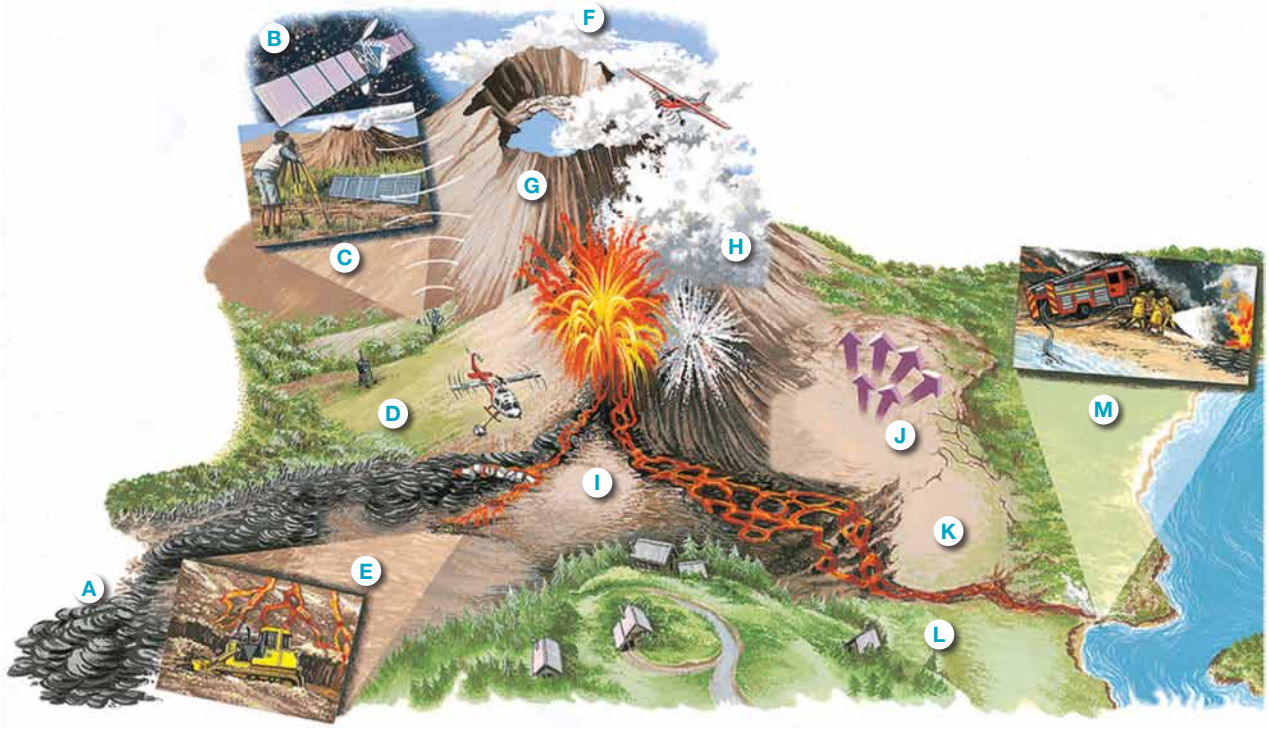
Fertile volcanic soils have been very important for rice growing in Japan and large areas of the Indonesian archipelago, especially on the islands of Java and Bali. There is also prime agriculture located in regions of rich soil; for example, around Naples, southern Italy, which generally has poor soils.

Another region of fertile volcanic soil is the agricultural area of the North Island of New Zealand. **Volcanic loam** in this area helps produce crops and pasture. Other regions include the western plains of the United States and the Hawaiian Islands. There is a small percentage of rich basalt soils in Australia, including the volcanic plains in Victoria, the north coast of New South Wales, the Scenic Rim of south-east Queensland, parts of Tasmania and the Atherton Tablelands in North Queensland.

Geothermal energy

Geothermal energy can be used in locations where there are active or dormant volcanoes still producing heat deep under the Earth's surface. High-temperature hot springs and geysers produce steam, which can be used to drive turbines and generate electricity. At lower temperatures, the hot water can be used for home heating or to develop hot or warm springs at resort spas. Over one quarter of Iceland's electricity is generated from geothermal energy, and it provides heating for more than 85 per cent of its homes. The other main countries that make use of geothermal energy are the United States (in California), Italy, New Zealand and Japan.

FIGURE 3 Predicting volcanic eruptions



A Geologists study records of past eruptions by examining flow patterns of mud, lava and ash. From these patterns they can draw danger maps that pinpoint dangerous areas.

B Satellites monitor changes in gas emissions and in the shape of the volcano. Specialised equipment can also measure heat increases.

C Seismographs can detect the small earthquakes caused by rising magma. These are linked by transmitters to computers so that scientists can quickly detect changes.

D Sound-measuring equipment was used to accurately predict an eruption in Mexico in 2000.

E In 1983, an attempt was made to divert a lava flow away from the towns of Rocco and Rogalna on Mount Etna in Italy. A channel was dug and barriers erected. The lava slowed and solidified before reaching the towns.

F Samples of gas can be collected and analysed. An increase in the amount of sulphur dioxide (SO_2) may indicate that magma is moving upwards.

G A rise in the temperature of a crater lake often precedes an eruption.

H It has been suggested that explosives could be used to breach crater walls, sending lava away from towns. This was first tried in Hawai'i in 1935.

I Helicopters have been used to drop concrete blocks in front of flowing lava.

J As magma rises and collects in the magma chambers, the cone may bulge outwards, warning of possible eruptions. Sensitive tiltmeters on the ground and on satellites can detect this bulging.

K Any bulging can also cause tiny cracks to appear.

L Buildings in areas prone to ash eruptions should have steeply sloping roofs so ash does not accumulate.

M In 1973, sea water was sprayed onto lava that was threatening a town in Iceland. The lava cooled quickly and solidified.

SkillBuilder discussion

Geographical inquiry

1. Study **FIGURE 3**. List the different techniques that have been used to try to stop the flow of lava.
2. Which technique do you think is the most effective and why?
3. Outline the ways in which geologists try to predict volcanic eruptions.

14.12.3 How to prepare for volcanic eruption

Can volcanic eruptions be predicted? What are the warning signs? How can the risk of death, injury and damage be reduced?

With about 500 million people living close to active volcanoes, it is important to monitor changes in seismic activity, prepare emergency plans, and try to predict eruptions to give residents time to evacuate safely.

14.12 SkillBuilder activity **INTERPRETING AND ANALYSING GEOGRAPHICAL DATA AND INFORMATION**

1. a. Refer to an atlas map showing world population density, settlements and the location of volcanoes. Make notes on the patterns you see. Discuss how close the settlements are to volcanoes and what populations they have.
   b. Write two statements that **describe** the relationship between population density, settlements and volcano locations. **Explain** how this relates to people's risk.
2. **Construct** a table **summarising** the measures required for living with volcanoes.
   a. Use the table to help you **classify** the information in **FIGURE 3**.
   b. **State** which of the measures you think is most effective. Give three reasons for your answer.

14.12 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 6	5, 7, 8

REMEMBER AND UNDERSTAND

1. **Complete** the following statements by filling in the blanks.
   Volcanic eruptions both _____ and destroy landscapes. Most eruptions do not occur randomly but occur in a specific area, such as along _____ _____. In some places there is a high number of _____ living near volcanoes. Most of the world's active volcanoes are located near _____ boundaries where subduction is occurring. This is also the location of many _____ across many countries. As a result, volcanic eruptions have caused deaths and great _____.
2. **Identify** which of the following are advantages and which are disadvantages of living near a volcano.
   a. Possibility of eruption causing the destruction of natural environment
   b. Fertile soils for agriculture
   c. Possibility of eruption causing deaths
   d. Geothermal energy that can be used for heat and electricity
   e. Natural hot springs for tourism
   f. Possible damage caused by eruption
   g. The smell of sulphur
3. **Determine** whether the following statement is True or False. Geothermal energy is not a renewable resource.
4. **Define** volcanic loam and **identify** where it is found.

ANALYSE AND APPLY

5. **Create** a photo sketch of **FIGURE 2** and label the following: volcano, volcanic plain, lava flows, farmland, settlement.

EVALUATE AND COMMUNICATE

6. **Explain** what geothermal energy is. **Suggest** some of the benefits of using this type of energy.
7. **Explain** how seismographs can be used to warn of a possible volcanic eruption.
8. Analyse **TABLE 1** and **explain** why volcanoes pose a multitude of risks.

Answers and sample responses for this topic are available online.

LESSON 14.13 Inquiry: Supervolcano report

Background

In this inquiry, you will investigate the recently discovered geomorphological feature known as a supervolcano. In groups of three to four, you will seek to develop a better understanding of supervolcanoes. You will also use critical thinking skills to analyse and interpret information to assess the relative merits of sources of information before submitting a report that will inform the class.

FIGURE 1 Grand Prismatic Spring in Yellowstone National Park

FIGURE 2 Eruption of Mount St Helens

There are estimated to be at least 12 supervolcanoes scattered around the world. Each one has the capacity for a potentially globally significant eruption.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task, you can use this rubric to self-assess.

Inquiry steps

Step 1: Geographical inquiry

Research the world's supervolcanoes. Choose one that you want to investigate further. Focus on the following:

- Where is it located?
- Why is it considered a supervolcano?
- What are its previous historic eruptions?
- Any other interesting facts about your volcano.

(Make sure you are conscious of the sources of your information. Use multiple sources to compile your data and discuss with your teacher ways in which you can verify the reliability of the source.)

Step 2: Interpreting and analysing geographical data and information

Discover the facts about your supervolcano's previous eruptions. What would a similar-size eruption mean today? **Examine** the effects of an eruption on the local, national and global scale.

Step 3: Concluding and decision-making

Compile a series of recommendations that you would make for managing this hazard in the future. You can base this on current monitoring and risk management programs or you can look at what is being done elsewhere in the world and recommend improvements if you think they are required.

Step 4: Communicating

Create a report for the rest of the class on your chosen supervolcano. Be creative in the way you want to communicate your information. For instance, you can prepare:

- a mock news report
- a front-/double-page spread for a newspaper
- a radio interview with a group of 'geologists, volcanologists and politicians', assigning roles to different people.

The key is to ensure that your report is both informative and interesting.

FIGURE 3 Hot boiling mud and sulphur springs due to volcanic activity in Wai-O-Tapu, New Zealand

LESSON 14.14 Review

14.14.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

14.2 What are plate tectonics?

- The Earth is made up of continental plates that are constantly moving slowly.
- Convection currents are the drivers of tectonic plate movement.
- Some plates converge; some diverge, and others slide past one another.
- Hotspots have created volcanic islands and landmasses around the world.
- The Pacific Ring of Fire is the world's most active tectonic region.

14.3 How do mountains form?

- This tectonic activity (moving plates) is the process that forms mountains.
- Mountains are classified by what they look like and how they were formed.
- The most common formations are fold mountains.
- Other mountain formations include fault-block, dome and plateau.
- The Himalayas are the world's largest mountain range.

14.4 Where are the world's mountain ranges?

- Mountains are found on every continent on Earth.
- There are major chains of mountains — mountain ranges — on all continents.
- The longest land-based mountain ranges in the world are the Andes and the Rockies.
- Vegetation, climate and weather change as the altitude on mountains increases.

14.5 How do people connect with mountains?

- Mountains can be remote and often support low population densities.
- Mountain ranges are vital for the world's water supply.
- Specific mountain landforms are sacred and special places to Indigenous Australians and other groups of people around the world.
- People have adapted a range of specialised techniques to farm in mountain ranges.

14.6 What are earthquakes?

- An earthquake is the sudden shaking of the ground caused by the passage of seismic waves through the Earth's crust.
- Earthquakes are a common occurrence each day across the Earth.
- There is a strong relationship between the location of plate boundaries (weaknesses in the Earth's crust) and the location of earthquakes.
- The **focus** of an earthquake is the place underground where the movement takes place and the **epicentre** is the spot on the Earth's surface directly above the focus.
- Earthquakes generate both primary and secondary waves that radiate out from the focus.
- Earthquakes are measured using the moment magnitude scale, the Richter scale and the modified Mercalli scale.

14.7 What is a tsunami?

- Tsunamis are giant waves caused by earthquakes or volcanic eruptions under the sea.
- The shape of the sea floor as it nears land influences the impact of a tsunami.
- Tsunamis are not a single wave; they are anywhere from approximately 5 – 20 waves.
- The Japanese tsunami was the result of a massive earthquake (8.9 on the Richter scale) that produced waves of over 6 metres in height.

14.8 What are the impacts of earthquakes and tsunamis?

- Earthquakes and tsunamis can affect people and result in deaths, injuries and damage to homes and infrastructure.
- The impact of a tsunami or earthquake can vary greatly depending on a country's level of income.
- The environment can be affected through landslides, erosion and liquefaction.
- Ground liquefaction occurs when soil suddenly loses strength and, mixed with groundwater, behaves like a liquid.

14.9 What are volcanoes and how are they formed?

- Volcanoes are formed when molten magma in the Earth's mantle is forced through an opening in the Earth's surface.
- Volcanoes can be formed in rift valleys, near convergent plate boundaries and over hotspots.

14.10 Investigating topographic maps – Mount Taranaki, New Zealand

- Mount Taranaki is the largest volcano on New Zealand's mainland, on the North Island.
- Mount Taranaki is a dormant stratovolcano that is likely to erupt in the future.

14.11 What are the types of volcanoes and how do they erupt?

- The shapes and sizes of volcanic landscapes depend on the type of lava, the amount of ash and the speed of the eruption.
- Volcanic ash is actually tiny fragments of rock and as such it is denser and more damaging than ash from a wood fire.
- A pyroclastic flow is a superheated avalanche of rock, ash and lava that rushes down the mountain.
- A lahar is a flow of mud and ash that occurs when eruptions melt snow and ice, and mix with rocks and stones.

14.12 How do volcanic eruptions affect people?

- Volcanic mountains form when magma erupts to the Earth's surface.
- Volcanic eruptions can destroy landscapes and kill people.
- Large numbers of people across the world live near volcanoes because of the location of fertile soils, ore deposits and geothermal energy.
- Predicting the type and scale of a volcanic eruption is increasingly important with over 500 million people living so close to active volcanoes.

14.13 Inquiry: Supervolcano report

- What is a supervolcano?
- Where are supervolcanoes located?
- What could happen if a supervolcano erupted?

14.14.2 Key terms

altitude height above sea level
convection current a current created when a fluid is heated, making it less dense and causing it to rise through surrounding fluid and to sink if it is cooled; a steady source of heat can start a continuous current flow
converging plate a tectonic boundary where two plates are moving towards each other
cultural relating to the ideas, customs and social behaviour of a society
divergent plate a tectonic boundary where two plates are moving away from each other and new continental crust is forming from magma that rises to the Earth's surface between the two
epicentre the point on the Earth's surface directly above the focus of an earthquake
fault an area on the Earth's surface that has a fracture; a fault lies at the major boundaries between Earth's tectonic plates
fault plane the area of a tectonic plate that moves vertically as a result of an earthquake
focus the point where the sudden movement of an earthquake begins

geothermal energy energy derived from the heat in the Earth's interior
hotspot an area on the Earth's surface where the crust is quite thin, and volcanic activity can sometimes occur, even though it is not at a plate margin
interconnection the idea that no object of geographical study can be viewed in isolation. It is about the ways that geographical phenomena are connected to each other through environmental processes, the movement of people, flows of trade and investment, the purchase of goods and services, cultural influences, the exchange of ideas and information, political power and international agreements.
landslide a rapid movement of rocks, soil and vegetation down a slope, sometimes caused by an earthquake or by excessive rain
liquefaction transformation of soil into a fluid, which occurs when vibrations created by an earthquake, or water pressure in a soil mass, cause the soil particles to lose contact with one another and become unstable; for this to happen, the spaces between soil particles must be saturated or near saturated
lithosphere the crust and upper mantle of the Earth
orographic rainfall occurs when a topographic barrier such as a mountain blocks the path of a movement of air horizontally. This forces the air upward where it cools, thus increasing the likelihood of rain.
Pangaea the name given to all the landmass of the Earth before it split into Laurasia and Gondwana, which over time became the continents we know today
primary wave also known as a P-wave; the first waves to hit an area during an earthquake, which cause a sudden jolt
rift zone a large area of the Earth in which plates of the Earth's crust are moving away from each other, forming an extensive system of fractures and faults
secondary wave also known as an S-wave; the waves that arrive at an area after the P-waves, and cause a sustained up-and-down movement
seismic wave a wave of energy that travels through the Earth as a result of an earthquake, explosion or volcanic eruption
volcanic loam volcanic soil composed mostly of basalt, which has developed a crumbly mixture

14.14.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview:
How do magma, water and tectonic plates change environments and what are the impacts on people and places?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

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Post-test	Online post-test
eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary
Video eLesson	Majestic mountains

14.14 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 6, 9, 10, 12	3, 4, 5, 7, 8, 11	13, 14, 15

REMEMBER AND UNDERSTAND

1. The type of plate boundary that most active, above-sea volcanoes are associated with is called:
   A. convergent.
   B. divergent.
   C. hotspot.
   D. lateral plate slippage.
2. Volcanoes are not evenly distributed, but are often clustered. The plate boundary that is spatially associated with the largest number of active volcanoes is called:
   A. Eurasian.
   B. African.
   C. Pacific.
   D. Caribbean.
3. The eruption of Mount Eyjafjallajökull, Iceland, in April 2010 caused an estimated loss of US$1.7 billion. Much of this was in the form of losses to the airline industry as airports across much of Europe were closed. The greatest risk to aircraft was posed by:
   A. lava.
   B. steam.
   C. volcanic ash.
4. While volcanoes can bring death and destruction, they can also benefit people. From the list, select three benefits that volcanoes bring to people.
   A. Fertile soils from the gradual breakdown of mineral-rich lava
   B. Ash build-up in rivers
   C. Geothermal energy
   D. Pyroclastic flows
   E. Spectacular scenery and tourist destinations
5. Fold mountains usually have:
   A. rounded peaks.
   B. flat peaks.
   C. pointed peaks.
   D. cratered peaks.
6. The epicentre of an earthquake is:
   A. the point below the Earth's surface where an earthquake occurs.
   B. the point on the Earth's surface directly above the focus of the earthquake.
   C. the area affected directly by an earthquake.
   D. the centre of the Earth.
7. The lithosphere is:
   A. the crust of the Earth.
   B. the Earth's upper mantle.
   C. the crust and lower mantle of the Earth.
   D. the crust and upper mantle of the Earth.
8. Volcanic loam is:
   A. the plume of smoke and ash arising from a volcano.
   B. the fiery centre of a volcano.
   C. a volcanic soil.
   D. hot molten ash created by a volcano.

9. Altitude is:
   A. the height of a mountain.
   B. height measured in metres.
   C. height above sea level.
   D. height above ground level.
10. Geothermal energy is:
   A. energy derived from waves.
   B. energy derived from the sun.
   C. energy derived from rocks.
   D. energy derived from heat within the Earth's interior.

ANALYSE AND APPLY

11. a. **Define** and **explain** *continental drift* and *plate tectonics*. Use your own sketched and labelled diagrams to help with your explanation.
   b. **Describe** the relationship between the location of mountains and mountain ranges and plate tectonics. Choose three examples from different *places* for your explanation.
12. **Describe** the general location and distribution of the world's earthquakes and volcanoes. **Explain** the relationship between this distribution and the location of plate boundaries.
13. **Explain** the terms *subduction*, *convergent plate*, *divergent plate* and *focus*. **Explain** how each is involved in mountain building.

EVALUATE AND COMMUNICATE

14. **Explain** whether earthquakes and tsunamis should be measured by their size on the Richter scale, by the number of people killed or by the cost of the damage caused. **Justify** your response.
15. 'If people are well prepared for earthquakes and volcanic eruptions, there will be fewer deaths and injuries and less destruction and damage.' **Outline** your opinion about this statement. **Justify** by using some examples.

Answers and sample responses for this topic are available online.

15 Changing nations – urbanisation and migration

LESSON SEQUENCE

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LESSON 15.1 Overview

INQUIRY QUESTION

Why do people move between and within countries, and how are our urban environments changing to provide a sustainable future?

People move from one place to another for many reasons, like political, economic, social or environmental factors. Sometimes they have to move quickly, such as in times of emergency, while at other times, they can plan it out. Some moves are forced, and others are by choice. Moving has effects, like more people living in cities.

Cities have been around for about 5000 years, and more people have been living in urban areas over time. In 2008, for the first time, more people lived in cities than in rural areas. Megacities have developed across the globe as a result. We will look at why people move, how it affects **urbanisation**, the pros and cons of living in cities and the increasing need to develop sustainable solutions to the issues that these urban areas face.

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Pre-test
Online pre-test

eWorkbook
Customisable worksheets for this topic

Digital document
Key terms glossary

Video eLesson
Urbanisation and migration

SkillBuilder

Use the SkillBuilder activities to develop these Geographical concepts and skills:

- GEOGRAPHICAL INQUIRY
- CONCLUDING AND DECISION-MAKING
- COMMUNICATING

LESSON 15.2 What is migration?

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **define** key terms related to the concept of migration
- **identify** different types of migration
- **understand** the difference between push and pull factors for migration.

Tune in

A range of factors influence the decision of people to leave one place to live in another. Some factors may be more significant than others.

FIGURE 1 Millions of people every year flee their homes in search of a better life.

Consider FIGURE 1.

1. **Discuss reasons why people may try to make a dangerous journey across the ocean on a small boat like the one in FIGURE 1.**
2. **What are the risks associated with a journey like this?**
3. **Discuss the issues that the people in FIGURE 1 would face once they arrive in a new country.**

15.2.1 How do we define migration?

When people move from one place to settle in another, this is known as **migration**. Types of migration can be categorised by time, location and degree of choice. The table below outlines some examples.

TABLE 1 Types of migration

Duration	Location	Degree of choice
• *Permanent* — migrants choose to move and remain in their new location indefinitely. • *Temporary* — migrants may choose to move again, or even return to their original location. • *Seasonal* — migrants move for a specific period of time for employment or due to climatic reasons.	• *International* — migrants choose to move from one country to another. • *Internal* — migrants choose to move from one place within a country to another.	• *Forced* — migrants have no option but to move, due to conflict, natural disasters, etc. • *Voluntary* — migrants freely choose to move for reasons that benefit them.

For every individual migrant, their personal migration story will link to each of the categories outlined. For example, comedian, actor, artist and author Anh Do fled Vietnam with his family as a refugee in 1980. They eventually settled in Australia, where Anh Do has lived, studied and worked since. Therefore his migration was:

- permanent (as he has remained in Australia ever since)
- international (as he moved from one country to another)
- forced (as he was a refugee).

15.2.2 What do we mean by push and pull factors?

When deciding to move from one place to another, migrants are influenced by a range of push and pull factors.

TABLE 2 An overview of push and pull factors

Factor type	Description
Push factors	Characteristics, qualities or attributes of a place that are unfavourable or negative, and make people want to move away from it
Pull factors	Characteristics, qualities or attributes of a place that are positive and attractive, and encourage people to move there

Push and pull factors are key concepts in migration studies. Push factors are conditions that drive people to leave their home country, such as economic hardship, political instability, war or lack of opportunities. Pull factors, on the other hand, are the attractions of a new location, like better job prospects, political stability, improved living conditions or family reunification.

SkillBuilder discussion

Communicating

1. Discuss with a partner which of the reasons provided in **FIGURE 2** you think would be the most important reason for migrants to come to Australia. List them all in order from most important to least important.
2. Justify your response for the most important and the least important reason migrants are 'pulled' to Australia.

FIGURE 2 These images show some pull factors. These include religious tolerance, improved healthcare, job opportunities, family links, better housing and infrastructure, political freedom and better educational opportunities.

15.2 SkillBuilder activity GEOGRAPHICAL INQUIRY

1. As a class or in small groups, **create** a survey to gather migration information from your class, your year level, your whole school or your wider community.
   Construct questions that address:
   - the categories of migration types
   - whether the migration was international (between countries) or internal (within a country)
   - the place of origin
   - the place of destination
   - push factors
   - pull factors.
2. After gathering your data, decide how to **outline** your findings. You may wish to consider creating maps, graphs, or tables, and incorporating the use of relevant images.

15.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4, 6	7, 8

REMEMBER AND UNDERSTAND

1. Anh Do's family migrated internationally. **Identify** their country of origin.
   A. Cambodia
   B. Vietnam
   C. Laos
   D. Indonesia
2. **Determine** whether the following statements are True or False.
   a. The decision to migrate was forced on Anh Do and his family. This means that they freely chose to move for reasons that benefitted them.
   b. War is a pull factor.
   c. Religious freedom is a push factor.
   d. Desertification is a push factor.
   e. Internal migration is when migrants choose to move from one place within a country to another.
3. Seasonal migrants move for a specific period of time for _____ or due to _____ reasons.
4. **List** two examples of push factors.
5. **List** two examples of pull factors.
6. **Explain** the difference between forced and voluntary migration. Provide an example in your response.

ANALYSE AND APPLY

7. **Distinguish** between push and pull factors.
8. 'Seeking greater educational opportunities is a major reason for internal migration in many nations.' **Determine** whether this statement is True or False. **Justify** your answer.
9. Imagine you live in a rural village in India with no work. **Create** a list of all the possible attractions of moving to an urban area.

EVALUATE AND COMMUNICATE

10. **Discuss** the issues that may make you leave the country that you and your family have grown up in. **Evaluate** why people would make such a difficult decision.

Answers and sample responses for this topic are available online.

LESSON 15.3 Where are people moving to and from?

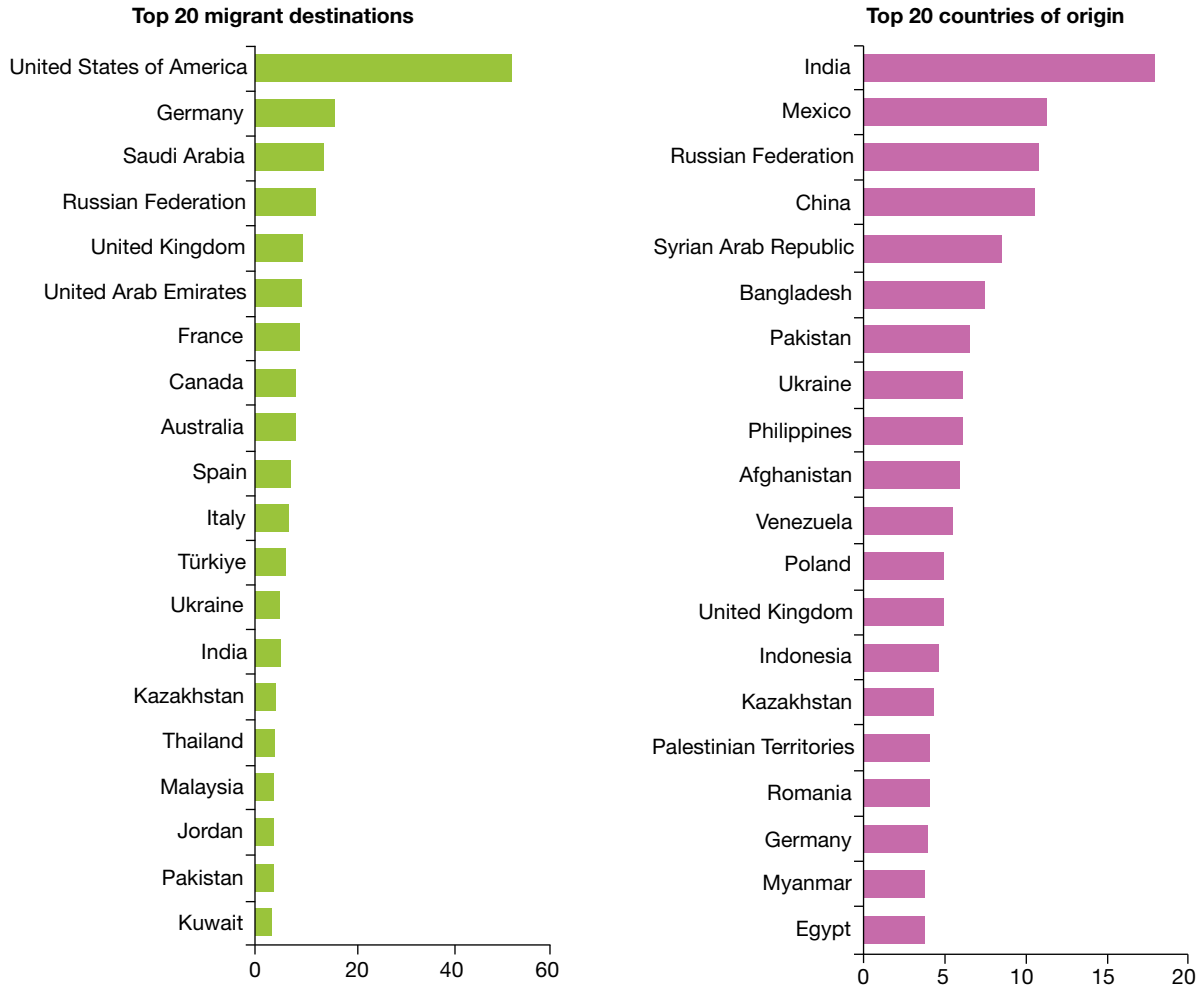
LEARNING INTENTION

By the end of this lesson, you should be able to **describe** patterns of and reasons for international migration and the effects of migration on Australia.

Tune in

The International Organization for Migration (IOM) is a United Nations related organisation. In addition to providing services and advice to governments and migrants, it also tracks migration data. Every year it releases a report on migration. **FIGURE 1** lists the top 20 destinations of international migrants and countries of origin.

FIGURE 1 Top 20 destinations (left) and origins (right) of international migrants in 2020 (millions)



Source: UN DESA, 2021a

With a partner, consider the figure and use the thinking routine of 'See, Think, Wonder' to discuss your ideas and then share them with the class.

- *See* — observe a piece of information provided by the figure.
- *Think* — what does this information make you think about migration destinations or origins?
- *Wonder* — what question could you ask about this information? What are you curious to know more about?

15.3.1 What is the difference between an emigrant and an immigrant?

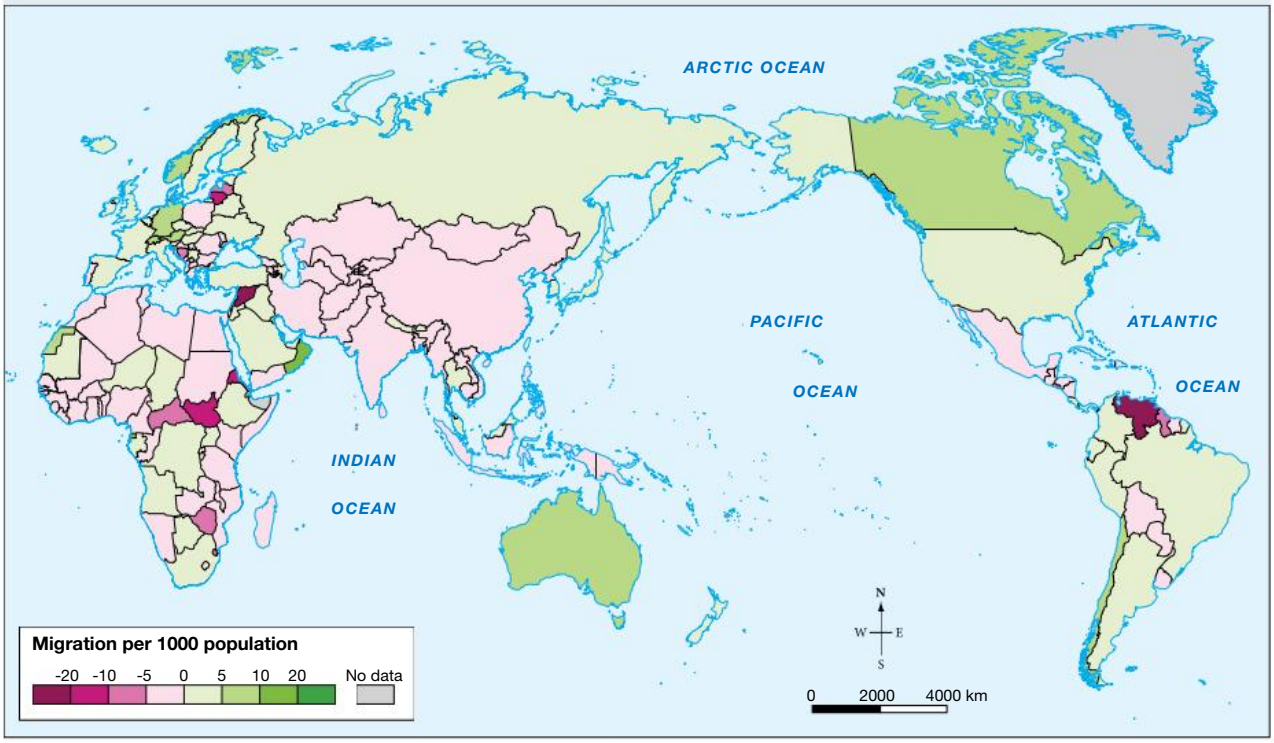
When people move from one country to live in another, they are considered to be both **emigrants** and **immigrants**. They are emigrating, or 'exiting' from, their country of origin, and immigrating, or 'moving into', their destination country. For example, a person moving from Thailand to live in Australia would be emigrating *from* Thailand and immigrating *to* Australia. In this scenario, Thailand is the country of origin (sometimes called the donor country) while Australia is the destination country (sometimes called the host country).

15.3.2 Where are people moving to and from internationally?

FIGURE 1 lists the top 20 destinations of international migrants as well as the top 20 countries of origin. In 2020, the United States of America was the most popular destination for international migrants, while the highest number of migrants were coming from India. Australia was a top ten destination for migrants in 2020. Some countries feature on both lists.

Annual net migration takes into account the difference between the number of people who move to a country and the number of people who leave it over the course of a year. **FIGURE 2** provides a global picture of annual net migration from 2015 to 2020. Countries in green are those that received more immigrants (people arriving) than they had emigrants (people leaving), whereas the opposite occurred in countries that are red. If more people arrive than leave, this is called positive net migration; if more people leave than arrive, this is called negative net migration.

FIGURE 2 Annual Net Migration rate, 2015–20

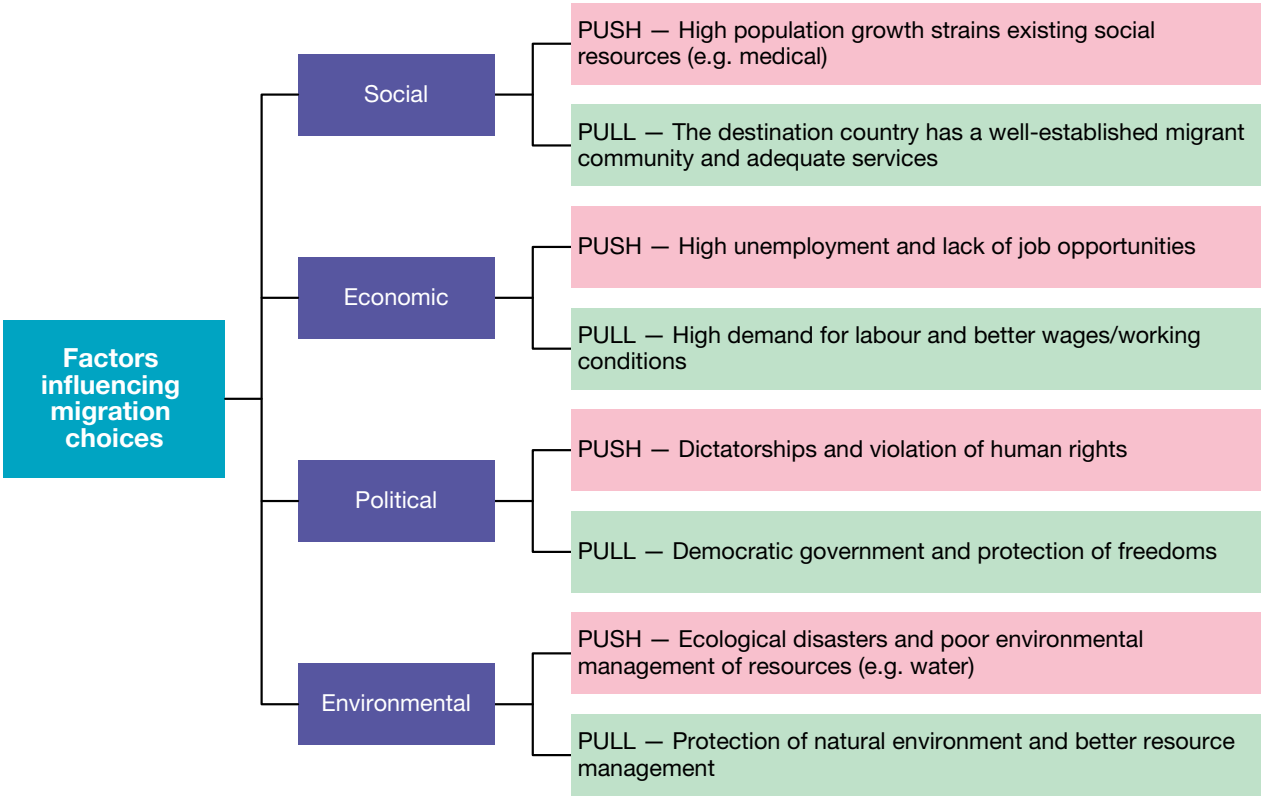


Source: Based on data from United Nations, Department of Economic and Social Affairs, Population Division (2019). World Population Prospects 2019, Online Edition. Rev. 1. Map redrawn by Spatial Vision.

15.3.3 Why are people moving internationally?

There are a range of push and pull factors that influence why people choose to move and where they choose to move to, and these can be broadly categorised as social, economic, political or environmental reasons (see **FIGURE 3**).

FIGURE 3 Factors influencing migration choices



SkillBuilder discussion

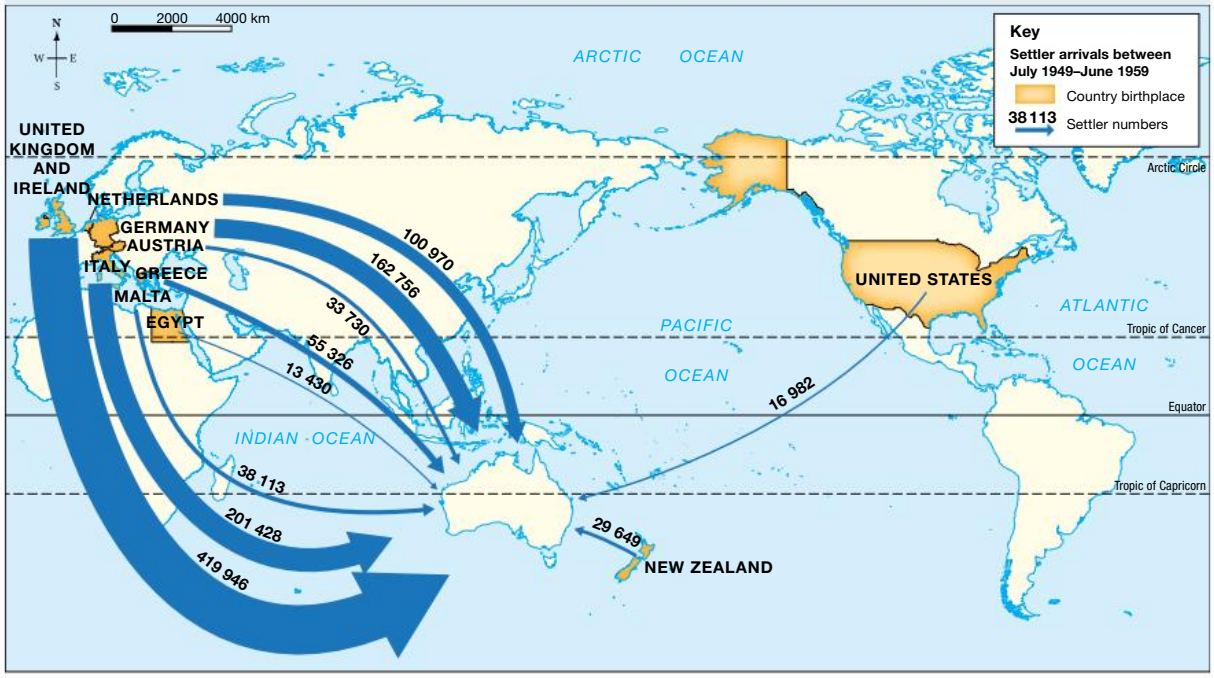
Geographical inquiry

1. Using the information in **FIGURES 2** and **3**, discuss why the USA is the world's largest migrant destination.
2. Which of the four factors is most likely to lead to forced migration?
3. Which of the four factors is most likely to explain migration to Australia?

15.3.4 Where are international migrants to Australia from?

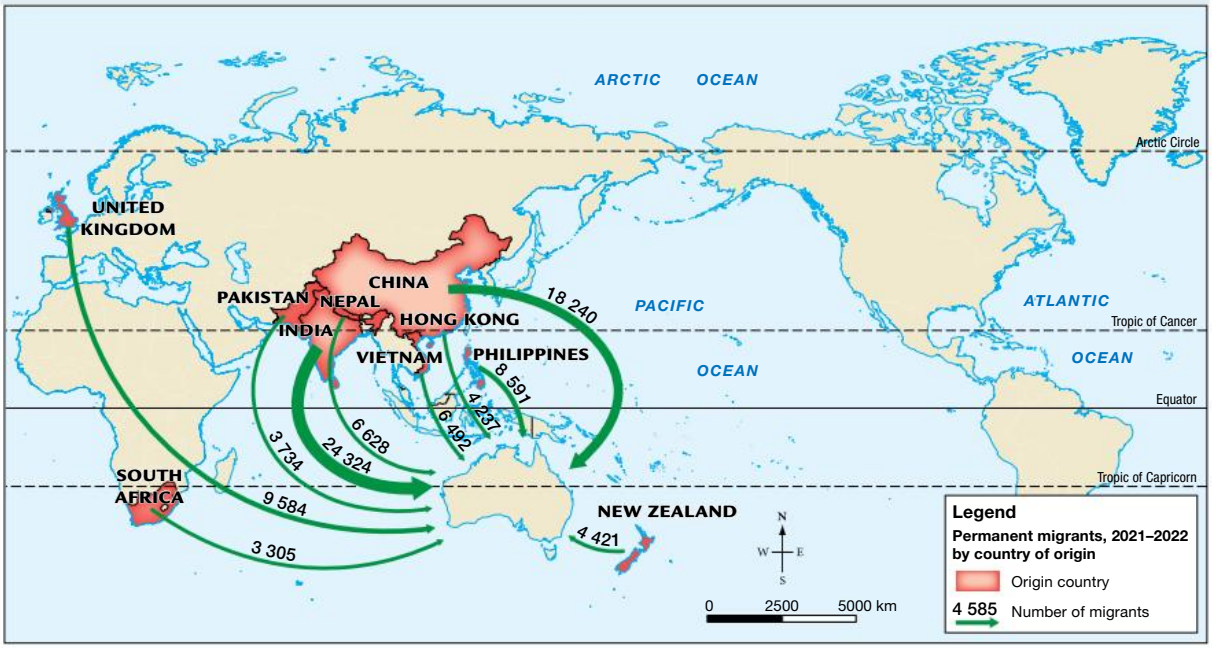
Between 1851 and 1861, more than 600 000 people came to Australia. While the majority were from Britain and Ireland, 60 000 came from continental Europe, 42 000 from China, 10 000 from the United States and just over 5000 from New Zealand and the South Pacific. However, since 1975, with the abolition of the white Australia policy that limited immigration to Europeans and people from the British Commonwealth nations, the country has attracted more immigrants from Asia (see **FIGURES 4** and **5** and **TABLE 1**).

FIGURE 4 Origins of Australia's migrants, 1949–59



Source: Map drawn by Spatial Vision

FIGURE 5 Settler arrivals by country of birth according to the 2021 census



Source: Australian Government, Department of Home Affairs

SkillBuilder discussion

Geographical inquiry

1. Identify the two nations from which the most migrants arrived in Australia in 2021–2022.
2. Comparing **FIGURES 4** and **5**, describe the change in the countries of origin for the majority of Australia's migrants.
3. Discuss why you think this change has occurred.

About one-third of the population of each of our large cities was born overseas. Migrants from certain countries tend to be attracted to certain Australian states and territories more than others (see **TABLE 1**).

TABLE 1 Top five countries of birth by state or territory in 2021

ACT	NSW	NT	Qld	SA	Tas.	Vic.	WA
Australia 317 600	Australia 5 586 710	Australia 188 910	Australia 3 952 050	Australia 1 350 180	Australia 474 920	Australia 4 475 230	Australia 1 810 460
India 17 510	China 261 330	Philippines 7320	New Zealand 229 920	England 98 770	England 20 420	India 272 250	England 211 730
England 13 410	England 240 530	India 5860	England 201 750	India 47 190	China 7440	China 182 140	New Zealand 85 590
China 12 720	India 219 230	England 5790	India 76 870	China 27 470	India 6530	England 181 440	India 66 550
Nepal 5690	New Zealand 128 460	New Zealand 4840	China 60 350	Vietnam 18 150	Nepal 6480	New Zealand 108 640	South Africa 49 300

Source: ABS 2024

15.3.5 Why have people migrated to Australia?

Australia is a land of **migrants**. In a way, all non-Indigenous Australians are migrants — at some stage in the past, perhaps as long ago as European settlement, our ancestors came to this country to live. In 2021, nearly one-third of Australia's population was born overseas.

Since the earliest times, people have moved from one part of the world to another in search of places to live. Migrants have come to Australia for many reasons (see **FIGURE 6**).

In addition, Australia is interconnected to Asia, particularly through trade and geographic proximity. This makes Australia appealing as a destination country for migrants from China, India, Vietnam and other Asian countries. The shared historical connections and/or common language may increase the appeal of Australia as a destination country for migrants from other English- speaking countries, such as England and New Zealand.

15.3.6 What are the effects of international migration to Australia?

International migration to Australia has significant social, economic and cultural effects, shaping the country's demographic landscape and influencing its growth and development.

Social effects

Migration has greatly increased Australia's population, growing from 7 million after World War II to over 27 million now. This growth is due to both migrants arriving and higher birth rates.

Migrants have enriched Australian society, culture and economy. Many communities organise festivals and share their foods, languages, music, customs, art and dance.

Australia is very multicultural, with people from over 200 countries. It's important to respect and support everyone's right to their own culture, language and religion.

FIGURE 6 Reasons for immigration to Australia

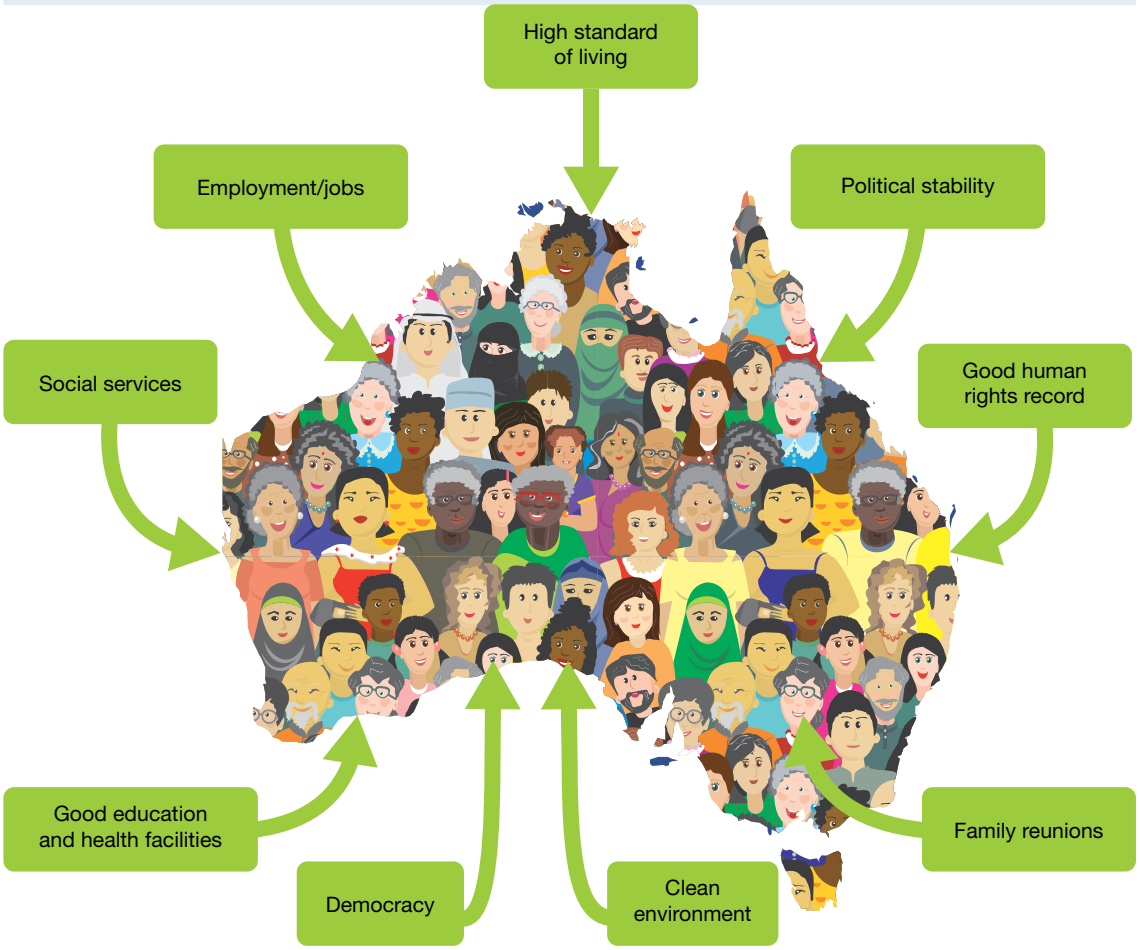
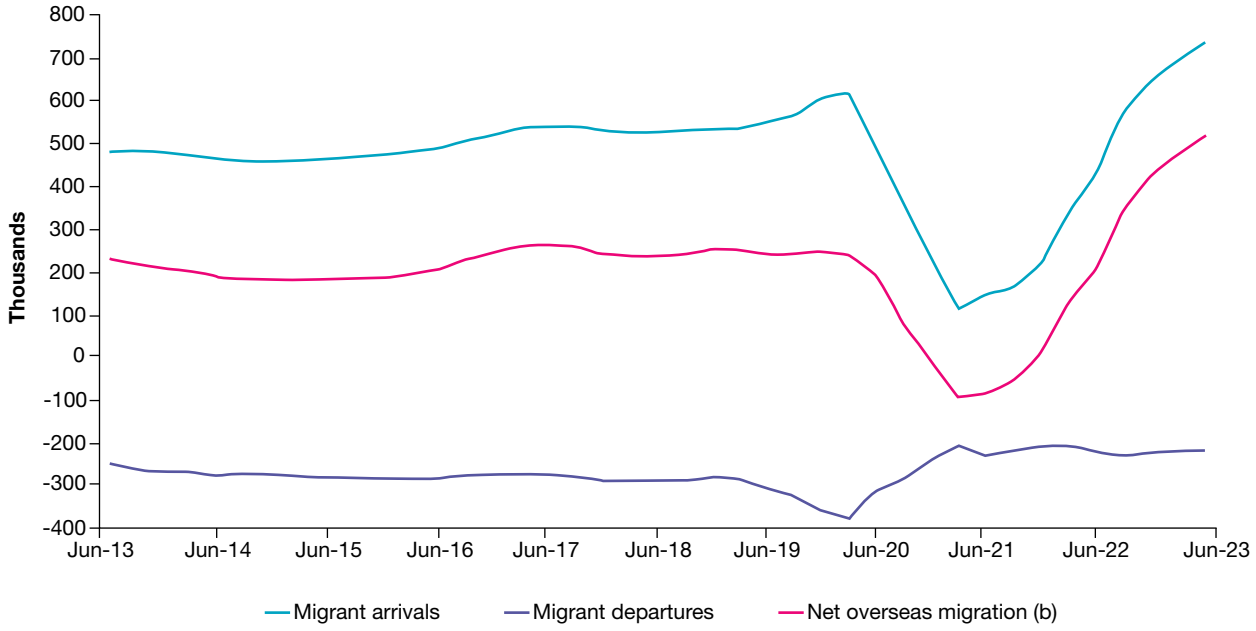


FIGURE 7 Overseas migration — Australia

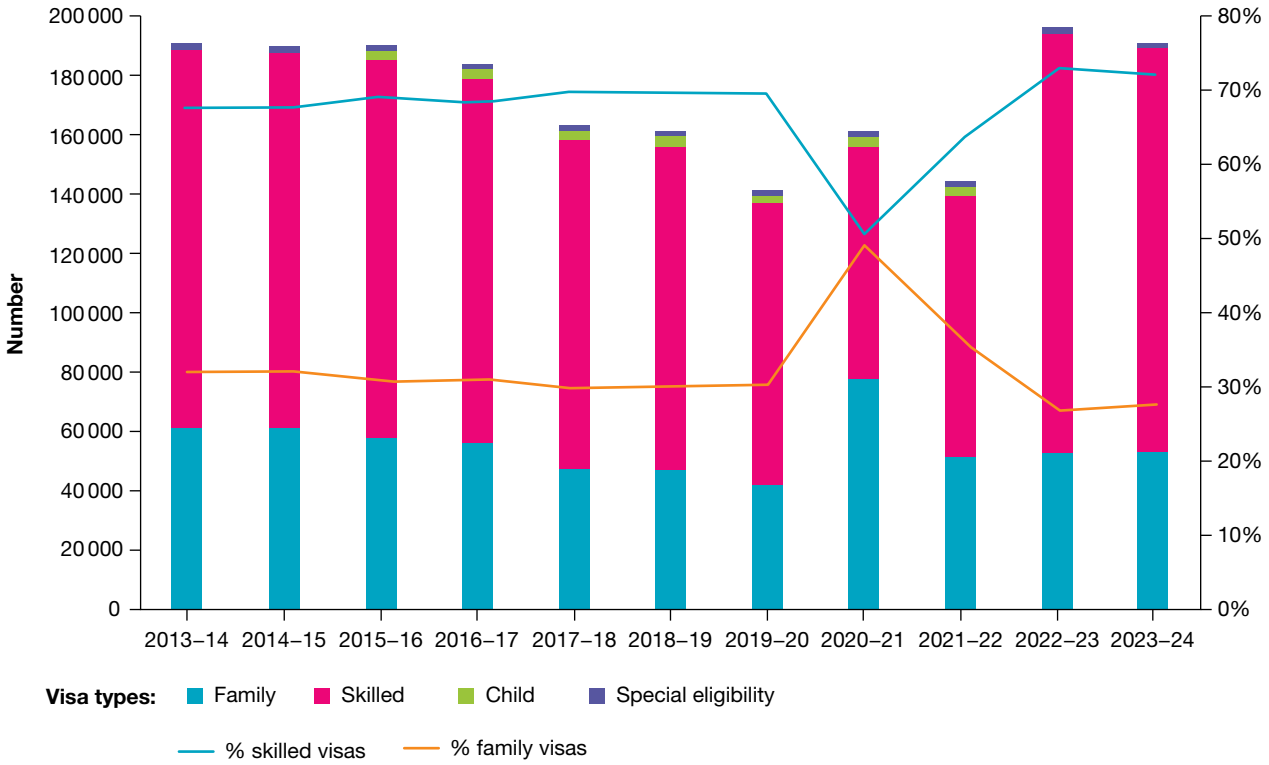


Economic effects

An increased population also means a greater demand for goods and services, which stimulates the economy. Migrants need food, housing, education and health services, and their taxes and spending allow businesses to expand. Apart from labour and capital (money), migrants also bring many skills to Australia. Significant numbers of migrants come as skilled migrants, meaning they have in-demand qualifications or professions (see **FIGURE 8**).

Migrants generate more in taxes than they consume in benefits and government goods and services. As a result, migrants as a whole contribute more financially than they take from society.

FIGURE 8 Visa types for migrants to Australia, 2013–24



Source: Department of Immigration

Environmental effects

In the past, people argued that immigrants put pressures on Australia's environment and resources by increasing our population and water, energy and other requirements. However, today many people believe that Australia's environmental problems are not caused by migration and population increase, but by inadequate planning and management.

15.3 SkillBuilder activity GEOGRAPHICAL INQUIRY

1. Refer to **FIGURE 1** and write the top ten destination countries and the top ten origin countries (note any countries that appear on both lists).
2. **Select** one colour to represent the destination countries.
3. **Select** a different colour to represent the origin countries.
4. **Select** a third colour for any country that appears on both lists.
5. On a blank map of the world (ideally A3 in size), use your chosen colours and highlight the countries from your list. Use a political map in an atlas to assist you in locating each country.

6. On your completed map, remember to include all BOLTSS.
   a. *Legend* — tell your reader what colours are used to represent the different categories of countries.
   b. *Title* — this should be specific and informative. The title of the graph your sourced your data from is a good starting point.
   c. *Source* — this should tell your reader where you got your information from (therefore it will be the same source as the graph's source).
7. *Going further:* **Discuss** your map with a classmate. **Determine** whether you can see any patterns. **Identify** where most of the destination countries are located. **Identify** where most of the origin countries are located. **Propose** some push and pull factors that may apply to this data.

15.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 3	1, 4, 5, 8	6, 7, 9, 10

REMEMBER AND UNDERSTAND

1. Refer to **FIGURES 4** and **5**. **Describe** how the origins of our migrants have changed since 1949.
2. **Determine** whether the following statements are True or False.
   a. The greatest number of migrants are in Australia for family reasons or are skilled workers.
   b. In 2020, Australia was the most popular destination for international migrants.
   c. Since 1975, Australia has attracted more immigrants from Asia.
3. **Select** the words from the table to complete the statement below.

emigrant	donor	immigrant	host

   A person leaving one country to move to another is called an _____. The country they are moving from is the _____ country. When they enter a new country, they become classified as an _____ and the new country is the _____ country.
4. Refer to **FIGURE 7**. **Describe** how important migration has been in terms of Australia's population growth.
5. **Consider FIGURE 1**. A number of countries feature on the list of top 20 destination countries for international migrants as well as the list of top 20 origin countries. **Select** those that apply from the list below.
   A. Thailand
   B. Romania
   C. Russian Federation
   D. India
   E. Mexico
   F. Kazakhstan
   G. Australia

ANALYSE AND APPLY

6. Refer to **FIGURE 8**. **Explain** the general pattern for each of the following types of migration to Australia between 2013 and 2024.
   a. Skilled migrant
   b. Family
   c. Total numbers
7. Refer to **TABLE 1**. **Describe** how the distribution of migrant groups varies within Australia. Ensure that you include at least three states in your analysis.
8. Refer to **FIGURE 6**. **Outline** the main reasons why people would migrate to Australia.

EVALUATE AND COMMUNICATE

9. **Determine** the two main benefits of migration to Australia. Give reasons for your answer.
10. **Explain** what types of skills you would place at the top of the list for skilled migrants to Australia. **Justify** your answer.

Answers and sample responses for this topic are available online.

LESSON 15.4 Why do people migrate within countries?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **explain** why people within Australia and China internally migrate
- **describe** the concept of internal displacement.

Tune in

Australians move from place to place within Australia for a number of reasons; some of these are illustrated in **FIGURE 1**.

FIGURE 1 Australia's moving population

Source: Map drawn by MAPgraphics

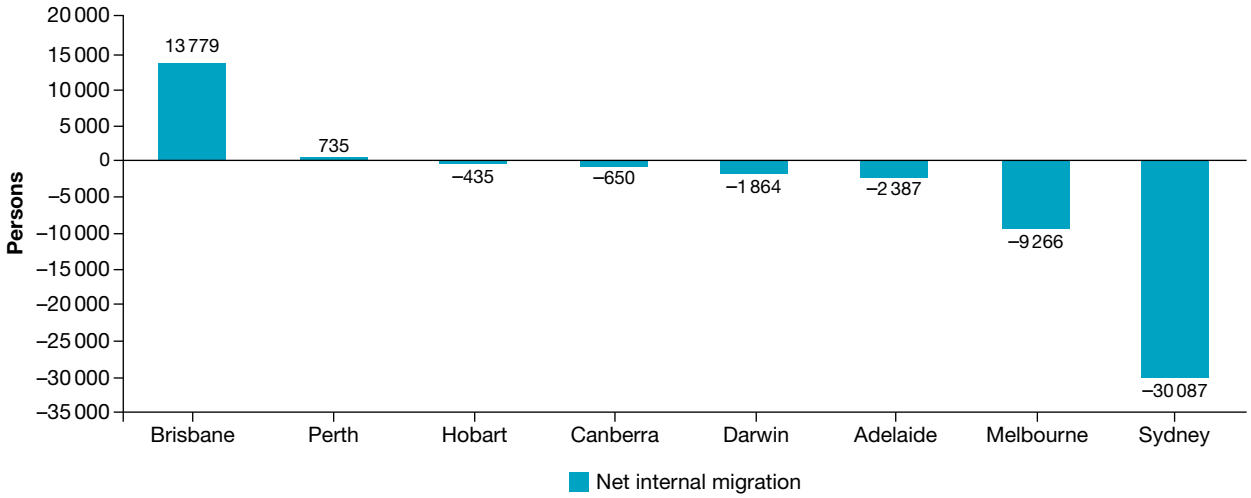
1. **What do you think is meant by the terms *sea change* and *tree change*?**
2. **FIFO is an acronym that refers to workers who 'fly-in fly-out' of locations. Look at the regions identified as FIFO on the map. What do you know about these regions? What is the focus industry for these regions that workers are employed within?**
3. **Do you personally know any FIFO workers or people who have been involved in a sea or tree change?**

15.4.1 What makes people move within Australia?

People move for many reasons. The average Australian will live in 11 houses during their lifetime — this means that many people will live in more. You may move to live in a larger house or a smaller house as your family size or income changes. On retirement, you may want to live near the mountains or the sea.

Forty per cent of Australians changed the place where they lived in the five years prior to 2020. There has also been a recent pattern of people internally migrating to regional centres, primarily because of housing costs.

FIGURE 2 Net internal migration by capital city (2020)



It is important to note that internal migration refers to people already living within Australia and thus the figures discussed do not account for new migrants.

SkillBuilder discussion

Communicating

1. Identify the two cities with increased populations because of internal migration.
2. Discuss why Melbourne and Sydney are losing the most people.
3. Propose how the COVID-19 pandemic (2020–2021) may have impacted these figures.

The Great Australian Divide splits Australia into two regions: the Heartland and the Frontier. The Heartland has about 21 million people living in modern, urban areas. The Frontier is home to around 5 million people in remote, resource-rich areas.

Sea change or tree change

The expressions **sea change** and **tree change** refer to people moving from cities to coastal or rural areas, seeking a peaceful life and closer community. This trend affects coastal and mountain areas across Australia, with local communities often struggling to provide the necessary services and

infrastructure for the growing population. Popular spots for sea changers include Geelong, Busselton, Wollongong, Cairns and the Gold Coast.

Not everyone enjoys their new rural life, and some return to the city due to missing family, friends, cultural activities, or professional and health services.

Fly-in fly-out workers

Mining jobs have increased in the Pilbara, northern Western Australia. However, local towns lack the infrastructure to support a large population, and rent can be as high as $3000 per week.

FIGURE 3 Geelong, Victoria, is a popular location for sea changers.

To attract workers, companies use a **fly-in fly-out (FIFO)** workforce. FIFO workers commute from places like Perth or even Bali, rather than living locally. This has the potential to make local residents feel uneasy, partially because FIFO workers don't invest their wages in the local economy, changing the town's nature without becoming part of the community.

Seasonal agricultural workers

Many rural jobs, like picking and pruning grapes and fruit trees, are seasonal and need a large workforce for only a few months each year. Many rural children move to cities for education, jobs or a more exciting life, leaving a shortage of agricultural workers.

Backpackers and people from Asia and the Pacific Islands on short-term work visas often fill these seasonal jobs. Towns like Robinvale in northern Victoria now have Asian grocery stores, an Asian bakery, and shops selling Tongan goods to cater to these workers. Robinvale is home to people from many countries, including Italy, Tonga, Vietnam, Malaysia, New Zealand, China and Greece.

15.4.2 What makes people move within China?

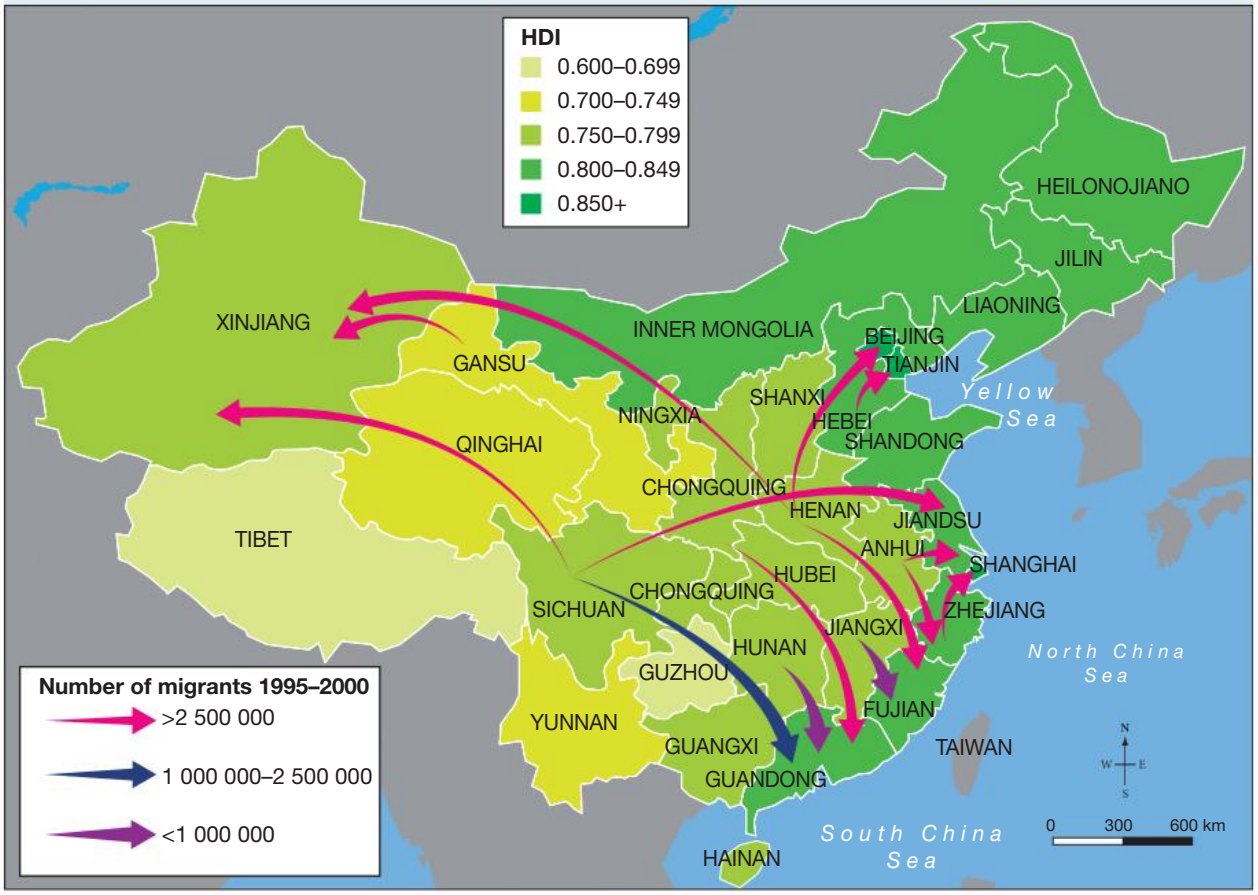
In Australia, internal migration is mostly driven by factors such as work, sea change or tree change, lifestyle or income. We will now compare this with China, where internal migration is primarily shaped by domestic economic growth, urbanisation and government policies aimed at balancing regional development.

FIGURE 4 A dramatic rural–urban migration shift has been occurring in China.

China has been experiencing a changing **population distribution**. In 2012, the country's urban population became larger than that of rural areas for the first time in its history, as rural people moved to towns and cities to seek better living standards. China has since become the world's largest urban nation.

Chinese labourers from the provinces have been moving to coastal cities in search of job opportunities, following reforms in 1978 that opened up China to foreign investment. Until then, rural–urban migration was strictly forbidden in China. Since then, more than 150 million rural residents and workers have migrated from the inner provinces to cities, mainly on the east coast. About half of rural migrants moved across provinces. This is the largest migration wave in human history (see **FIGURE 5**).

FIGURE 5 People from Chinese inland provinces that have lower wages and Human Development Index (HDI) values have moved to cities and provinces with higher HDIs and incomes.



Source: Map drawn by Spatial Vision

SkillBuilder discussion

Geographic inquiry

1. Use **FIGURE 5** to describe the migration movements in China.
2. Does this happen in other countries? Can you give examples?

Pull factors in China

Pull factors are factors that attract people to move to a particular place. Economic factors include higher incomes achievable in a city. The average income of rural residents is about one-fifth that of urban residents in China. Social factors include more opportunities for career development, access to a more modern urban lifestyle and access to improved infrastructure and technology.

Push factors in China

Push factors are factors that encourage people to move away from a place. Increasing agricultural productivity since the late 1970s has resulted in fewer labourers being needed on farms and thus a huge surplus of rural workers. Agricultural production has become less profitable, so workers have been driven to cities to try to improve their economic situation. Political factors are also influential. China's central planners have encouraged local leaders in poor regions to encourage people to move to the cities. Their slogan was 'the migration of one person frees the entire household from poverty'.

15.4.3 Consequences of rural–urban migration in China

Rural–urban migration in China has profound effects on both rural and urban areas, impacting economic development, social structures and the environment. The table below highlights some of the key outcomes of this migration trend.

FIGURE 6 Some effects of migration on urban and rural areas in China

Urban centres	Rural areas
China's urban population rose from around 170 million people in 1978 to 941 million in 2024.	In 1949, 89 per cent of people in China lived in rural areas; by 2023 it was 35 per cent.
Tens of millions of people are classified as rural dwellers, even though they spend most of their time working in the cities and are denied access to social services, including subsidised housing, income support and education.	Labourers from rural regions working in cities must leave their families for months at a time or more.
Up to 40 per cent of rural income comes from urban workers sending money to their families.	Children in rural areas are increasingly being raised by grandparents and relatives, as their parents travel to the cities to earn more money.
There are currently 5 'megacities' in China with populations of over 10 million people.	A shift to an increased urban population results in reduced population pressures on the land.

SkillBuilder discussion

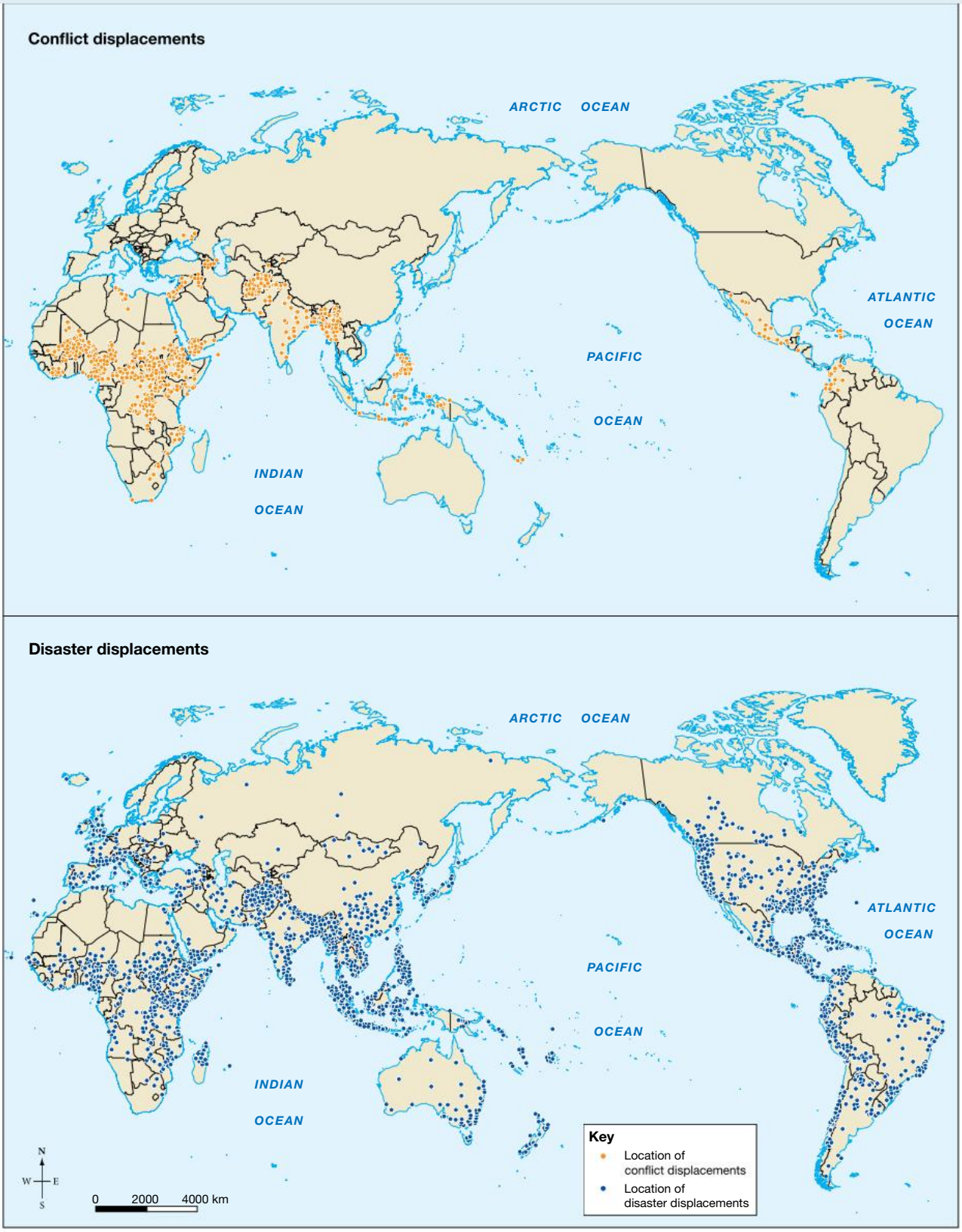
Geographical inquiry

Read through the effects of migration on urban and rural areas in China (**FIGURE 5**). For each example, discuss what the next consequence would be?

15.4.4 What is internal displacement?

The examples from Australia and China mostly concern residents who have chosen to move voluntarily. For some people, this is not always the case. **Internal displacement** occurs when people are forced to leave their home due to conflict or environmental disasters but remain within their country's borders. A total of 40.5 million new internal displacements occurred by the end of 2020, with 76 per cent of these due to disasters and 24 per cent due to conflict and violence. During this period, the Democratic Republic of the Congo and the Syrian Arab Republic had the highest number of new displacements due to conflict and violence, at 2.2 and 1.8 million, respectively.

FIGURE 7 Conflict displacements (top) and disaster displacements (bottom) in 2020 by location



Source: *World Migration Report* 2022, *International Organization for Migration*

15.4 SkillBuilder activity GEOGRAPHICAL INQUIRY

1. In pairs, **investigate**, conducting research on the internet, the impact that COVID-19 (and extended lockdowns in particular) had on the number of tree changes and sea changes occurring in Australia during 2020–21.
   In conducting your research, try to find:
   - origins and destinations of migrants (where were people mostly moving from/to)
   - factors that made the migration possible (e.g. ability to work from home)
   - relevant statistics.

   The ABS website may be a useful place to start. Search phrases such as 'migration within Australia COVID-19' or 'migration Australia COVID-19 sea change' to explore other resources. Remember to keep the focus on migration within Australia rather than between Australia and other countries.
2. **Communicate** your findings by **creating** an infographic.

15.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5, 6	7, 8, 9, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following is True or False.
   FIFO workers are those who permanently live in a remote work location.
2. **State** the difference between a tree changer and a sea changer.
3. **List** the positive and negative factors of making a tree change or sea change as a:
   a. family with young children
   b. retired couple.
4. The percentage of people living in China's rural areas has changed since 1949. In 1949, _____ per cent of people in China lived in rural areas. By 2023, this had decreased to _____ per cent. As a result, the urban population in China in 2024 is approximately _____.
5. There are many consequences of the dramatic changes in China's population distribution. **Classify** the following consequences as either positive or negative.
   a. Urban population growth
   b. Labourers leaving families for months at a time
   c. Smaller percentage of people living in rural areas
   d. Development of super cities
   e. Migrants classified as rural dwellers who live in the cities and are denied access to social services, subsidised housing, income support and education for their children
   f. Greater income flow to rural areas from urban workers

ANALYSE AND APPLY

6. **Describe** some of the push factors that led rural people to leave their homes for the cities.
7. **Discuss** why the Chinese government would encourage this mass movement of people from the country to the cities.
8. Internal displacement within a country often occurs due to conflict or environmental disasters. In 2020, Democratic Republic of the Congo and Syria had the highest number of new displacements. Drawing on your wider knowledge of current or recent world events, **identify** where you expect an increase in internal displacements to occur and **explain** why.

EVALUATE AND COMMUNICATE

9. **Determine** what initially led to people in Australia leaving rural areas for life in the city.
10. Create a table **summarising** the different reasons for internal migration in Australia and China.

Answers and sample responses for this topic are available online.

LESSON 15.5 Inquiry: A migration story

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** and explain the main types and patterns of internal and international migration
- **develop** research, data analysis and communication skills to effectively present findings on migration.

Background

Your task is to explore a migration story connected to you.

This could one from your own family or from someone close to you, like a family friend or trusted adult. Try to find out how they or their family came to live in Australia.

You can do this by:

- Talking to your parent, guardian, or another trusted adult at home.
- Asking questions in a safe and respectful way.
- Doing some research about the country or culture they came from.

If you're not sure who to talk to or need help getting started, speak to your teacher.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

A migration inquiry task

Inquiry steps

Step 1: Questioning and researching using geographical methods

Research your family's history and find out how they came to Australia. Select a family member to interview and investigate your family's country of origin.

The report will be in **two** parts.

Part 1

Create a report about Australia and your family's emigration country, highlighting the impact on both nations.

Part 2

Plan an interview detailing how migration affected your interviewee's family.

Step 2: Analysing data

The research report

Analyse the country of origin. Include:

- a map of the country at the time of emigration
- population and demographic information
- government type (e.g. democracy, communism)
- major religions
- social and economic issues
- interesting facts or differences between the two nations
- Australia's immigration policies at the time.

Step 3: Concluding and decision-making

The interview

Select an interviewee. Discuss potential questions and interesting stories from your family. Your interview should cover:

- reasons for leaving and choosing Australia
- links with the old culture (food, language)
- evaluation of migration's impact on the family, the donor country and Australia.

Prepare ten to fifteen open questions to encourage detailed responses. Record the interview and be flexible, allowing the interviewee to elaborate on interesting points.

Step 4: Communicating

Prepare a written report with the information from Step 2. Submit your interview as an audio or video file. Include a transcript if it's in another language.

Final paragraph

Summarise your impressions of the interview. Discuss the migration's impact on:

- the individual
- their family
- The donor country
- Australia.

LESSON 15.6 Urbanisation and urban growth

LEARNING INTENTION

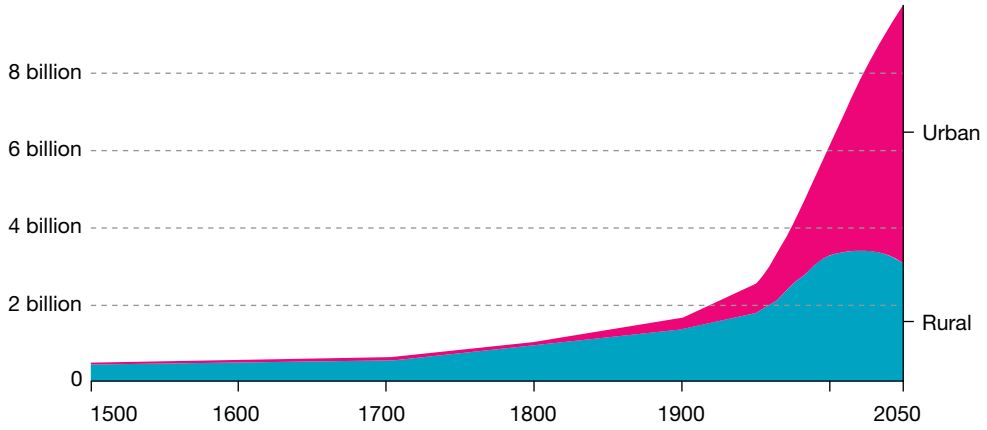
By the end of this lesson, you should be able to:

- **describe** urbanisation as a concept
- **explain** the difference between urbanisation and urban growth
- **summarise** the consequences of urbanisation in Australia and the United States.

Tune in

Urbanisation rates have increased dramatically over the past 100 years and are predicted to continue.

FIGURE 1 Urban and rural population projected to 2050, world, 1500–2050



1. **When did urbanisation start to increase? What are some reasons for this?**
2. **Why do you think urbanisation is predicted to continue and rapidly increase?**

15.6.1 What is urbanisation

Urbanisation is the movement of people from the country to the city. It's part of a country's **internal migration**. Cities were formed as a result of people moving from the country and gathering and settling in a central area. The earliest cities emerged about 5000 years ago in Mesopotamia (part of present-day Iran, Iraq and Syria). Originally, these cities depended on agriculture. In 1800, 98 per cent of the global population lived in rural areas and most were still dependent on farming and livestock production — only 2 per cent of people lived in urban areas.

However, as cities grew, primarily as a result of the Industrial Revolution and trade development, urban areas became centres for merchants, traders, government officials and craftspeople. By 2008, the proportion of people living in urban areas had increased to 50.1 per cent, and in 2022 the figure had risen again to approximately 57 per cent. It is important to note that the rate of growth has varied in different regions.

15.6.2 How does urbanisation differ across regions over time?

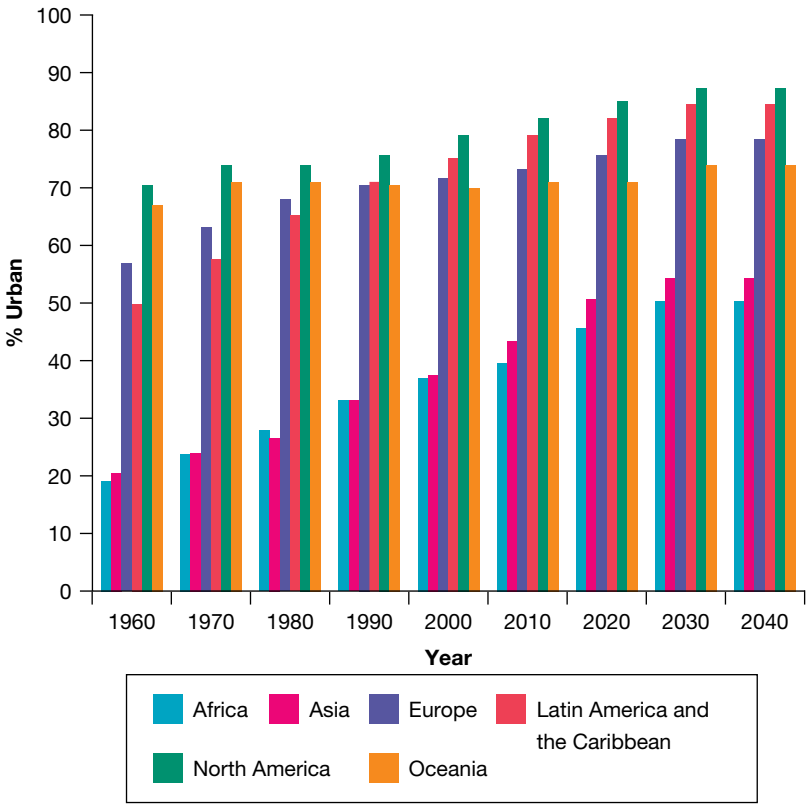
Urbanisation has not occurred evenly across the world. Some countries are predominantly rural, such as Cambodia and Papua New Guinea (populations 77 per cent and 87 per cent rural, respectively), whereas others are almost completely urban, such as Belgium and Kuwait (98 per cent urban for both). In fact, some countries have 100 per cent urban populations, including Bermuda, Cayman Islands, Hong Kong, Macau, Monaco, Vatican City and Singapore. South America is becoming one of the most urbanised regions in the world and currently has a population of around 385 million people. It is estimated that by 2050, 91.4 per cent of its population will be residing in urban areas.

SkillBuilder discussion

Geographical inquiry

1. Identify the two continents that were the least urbanised in 1900.
2. Identify which continents have been the most urbanised throughout this period.
3. Explain which continents have experienced the most growth in the period depicted in this graph.

FIGURE 2 The growth in urban populations over time



15.6.3 Urban growth

Urbanisation is when people move from rural areas to cities. **Urban growth** is the rate at which a city's population increases. You might hear people say, 'This suburb popped up overnight,' or, 'The city is getting bigger.' This refers to urban growth.

Urban growth often reflects a country's economic success. More urban growth means more houses and jobs, for builders, plumbers and electricians. Simply put: more urban growth, more money.

But there are downsides. Urban growth increases traffic, leading to more greenhouse gas emissions. It also causes water pollution as rainwater carries chemicals into water sources. More houses mean more water use for showers and drinking.

As cities expand, they need more space, which often comes from nature. This can harm wildlife habitats, reduce farmland and lead to the loss of parks and open spaces.

FIGURE 3 Melbourne's urban sprawl

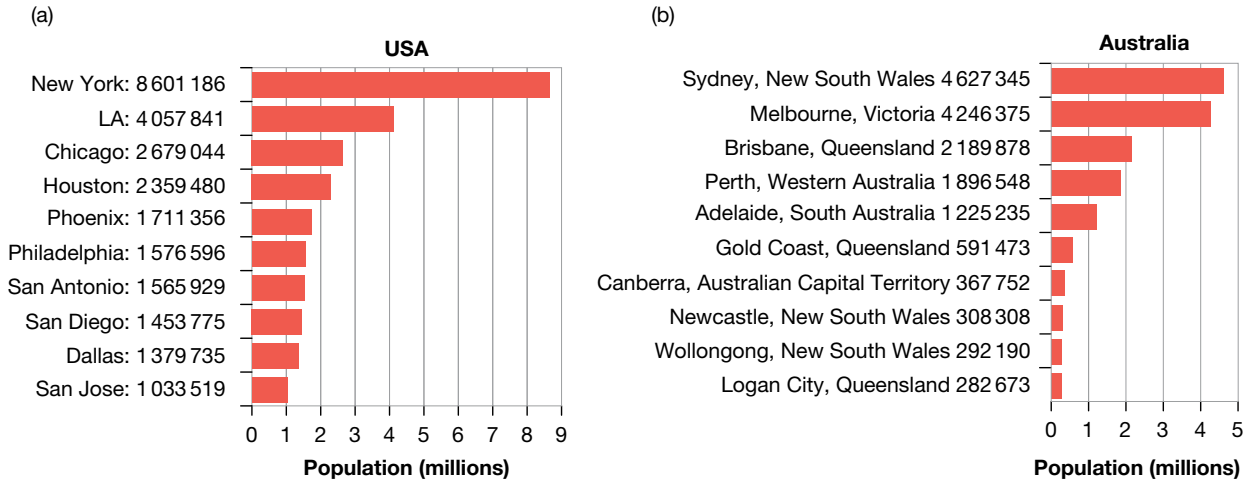
15.6.4 Consequences of urbanisation in Australia and the United States

Urban areas are those that are permanent settlements and feature a range of built structures such as houses, commercial buildings, roads, bridges, railways and so on. They can range in size based on the population. The Australian Bureau of Statistics defines urban centres as having a population of 1000 people or more.

Conurbations

Sometimes there are so many cities in a particular region that they seem to merge almost into one city as they expand. A **conurbation** is made up of cities that have grown and merged to form one continuous urban area. Both the United States and, to a lesser extent, Australia have conurbations.

FIGURE 4 Population of the top ten urban settlements in **(a)** the United States (2018) and **(b)** Australia (2019)



SkillBuilder discussion

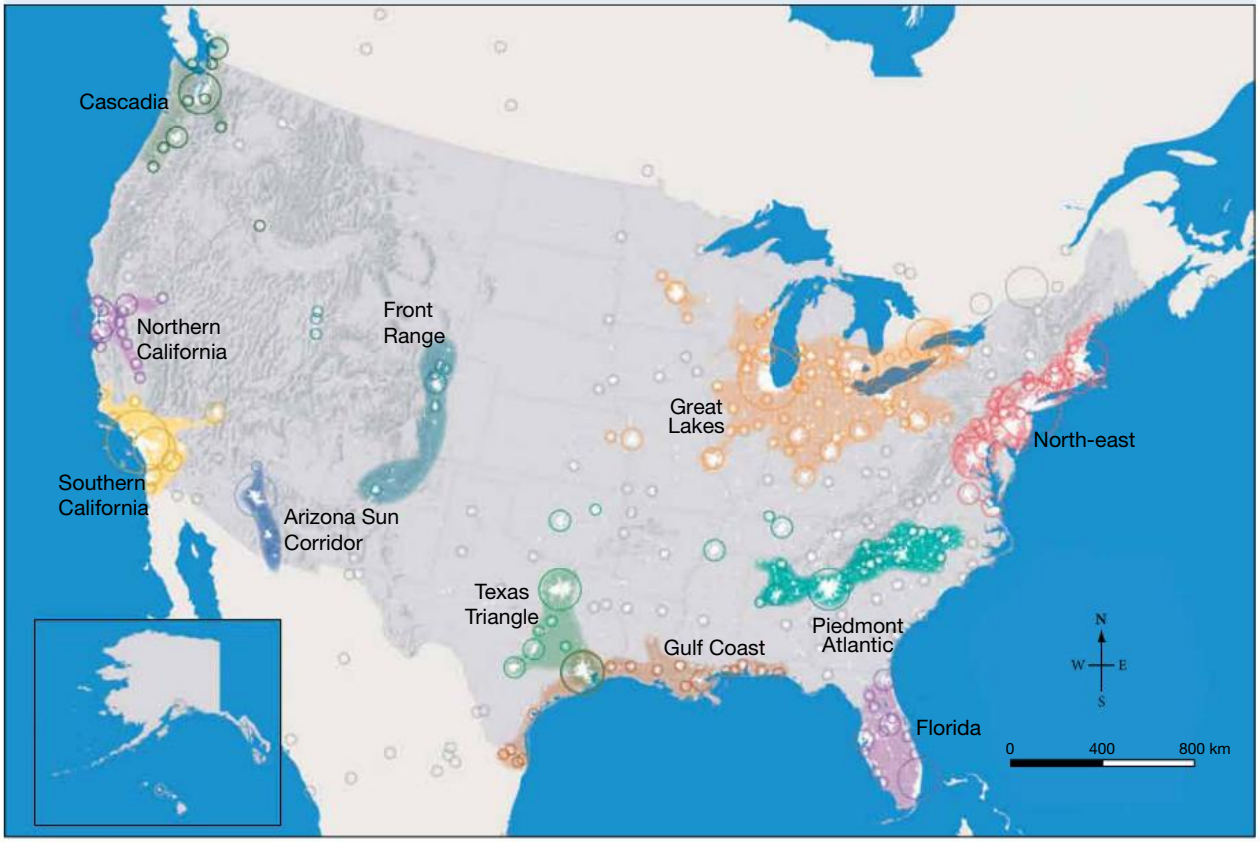
Communicating

1. Study **FIGURES 5** and **6**. List in order the five largest cities by population from Australia and the USA.
2. Explain why America's tenth largest city is so much bigger than Logan City in Australia.
3. Propose why Australia has such relatively large cities (Sydney and Melbourne) compared to the USA, which has a much larger population.

United States

Eleven conurbations have been identified in the United States (see **FIGURE 5**). The major conurbation is in the north-east region. It is often called BosNYWash because it covers the area from Boston in the north, through New York, to Washington, DC in the south. This region is home to more than 50 million people (17 per cent of the US population) and accounts for 20 per cent of the gross domestic product (GDP) of the United States.

FIGURE 5 Conurbations in the United States

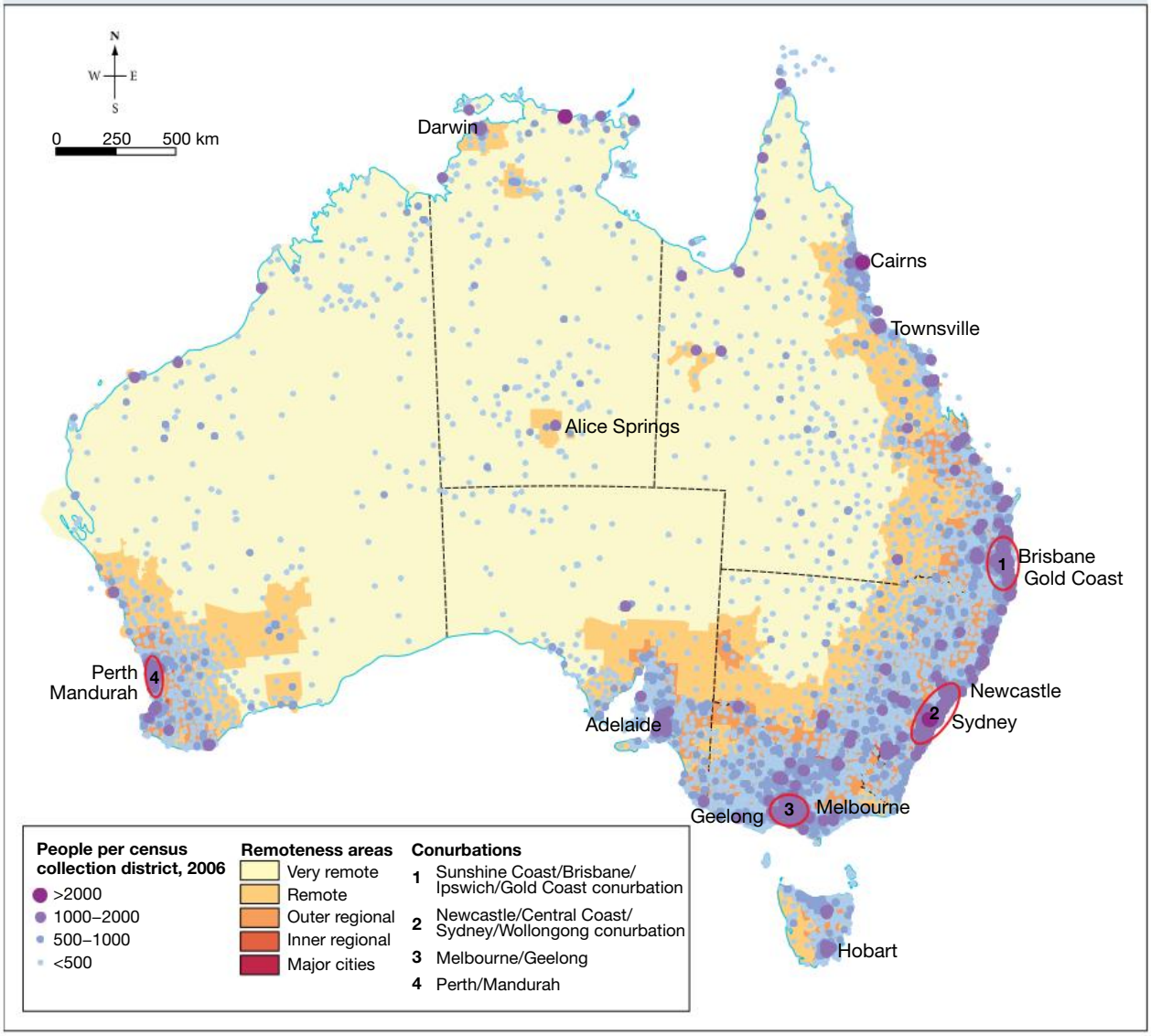


Source: Adapted with permission from Bernard Salt

Australia

Australia, on the other hand, has four conurbations (see **FIGURE 6**). One is in south-east Queensland; a second joins Melbourne and Geelong; and a third is from Perth to Mandurah. The fourth, the Newcastle–Wollongong conurbation in NSW, stretches for over 250 kilometres and is home to almost 6 million people.

FIGURE 6 Australia's population centres and conurbations



Source: Australian Bureau of Statistics

15.6 SkillBuilder activity INTERPRETING AND ANALYSING GEOGRAPHICAL DATA AND INFORMATION

1. Choose one of the conurbations in the United States and another in Australia.
2. **Create** a table and choose five of the following headings to complete a comparison of the two cities:
   - population
   - pollution levels
   - health care (accessibility of medical care)
   - unemployment levels
   - minimum wage
   - quality of water supply
   - percentage of people with a tertiary education
   - population density
   - modes of public transport
   - traffic congestion.
3. Use the information in your table to **compose** a report **summarising** your findings. You will need to look at both statistics and news reports in order to complete a comprehensive overview.

15.6 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5, 6	7, 8, 9

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statement is True or False.
   Urbanisation is the growth and expansion of rural areas into urban areas.
2. In Australia, an urban settlement has a population of over:
   A. 100
   B. 1000
   C. 10 000
   D. 100 000
3. Examine **FIGURE 2**.
   a. **Explain** how this figure shows that urbanisation has varied in different regions of the world.
   b. **Identify** the two regions that have the greatest rural population in 2020.
4. **Explain** what is expected to happen with urbanisation in the future.
   A. It is expected to decrease.
   B. It is expected to increase.
   C. It is expected to stop.
   D. It is expected to plateau.

ANALYSE AND APPLY

5. **Identify** three problems that can be caused by rapid population growth in urban areas.
6. **Explain** how urban growth differs from urbanisation.
7. **Explain** why urban growth is linked to economic success.
8. **Explain** the difference between conurbations and cities.

EVALUATE AND COMMUNICATE

9. **Explain** which of the consequences of urbanisation you think may continue to have the biggest effects on the **environment** in the future.

Answers and sample responses for this topic are available online.

LESSON 15.7 Urbanisation in Australia

LEARNING INTENTION

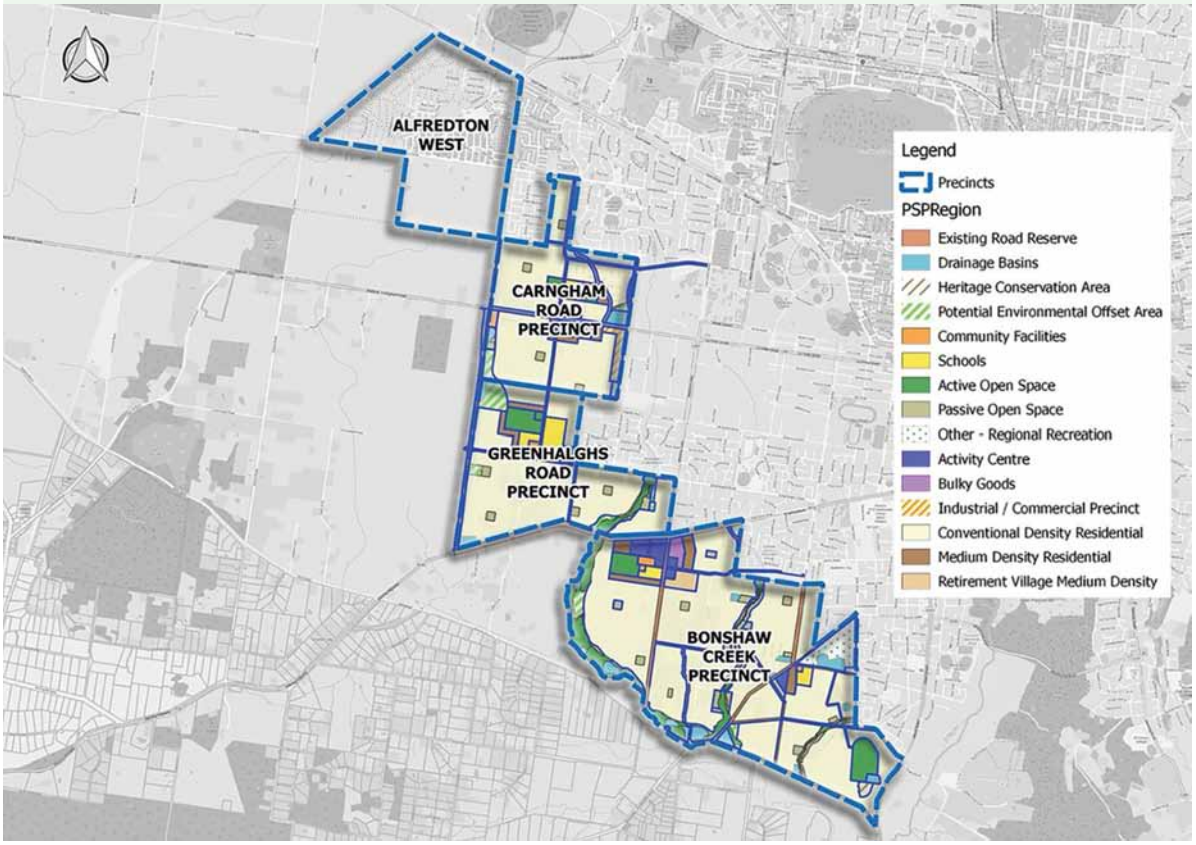
By the end of this lesson, you should be able to:

- **determine** whether Australia is an urbanised country
- **identify** consequences of urbanisation in Australia
- **explain** the term *ecological footprint*.

Tune in

The Victorian city of Ballarat is currently undergoing urban expansion. The city is looking to provide 18 000 new houses to accommodate a population of 40 000 people.

FIGURE 1 Proposed plans for the urban expansion of Ballarat



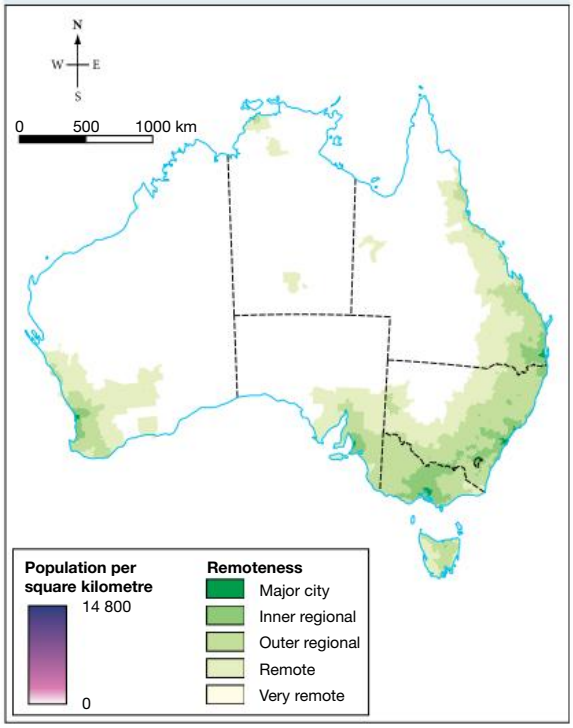
1. **How many areas have been set aside for schools? Do you think this is enough?**
2. **Consider the space allotted to residential areas and the space allotted to the green and open spaces. Do you think this is enough to make this a sustainable community?**
3. **How do you think this urban growth will impact the environment? List any positives and any negatives.**

15.7.1 Urbanisation in Australia

With a population of over 27 million people in 2024 and a very large landmass, Australia has an average population density of only 3.4 people per square kilometre. Yet 85 per cent of people live within 50 kilometres of the coast, and most of these people live in urban areas.

Australia is one of the most urbanised and coastal dwelling populations in the world, and the level of urbanisation is increasing. From federation (1901) until 1976, the number of Australians living in capital cities increased gradually from a little over one-third (36 per cent) to almost two-thirds (65 per cent). Since 1977, the population living in capital cities has grown to 66 per cent. It is estimated that by 2053 this will have grown to 72 per cent (with an estimated 89 per cent in the four largest capital cities).

FIGURE 2 A map of Australia's population distribution shows that it is highly urbanised and coastal.



Source: © Australian Bureau of Statistics.

All of Australia's capital cities have grown over time, as have many regional urban areas, such as the Gold Coast and Moreton Bay regions. This growth is expected to continue in the future (see **TABLE 1**).

TABLE 1 Australian capital city 2023 populations and projections for 2036 and 2066

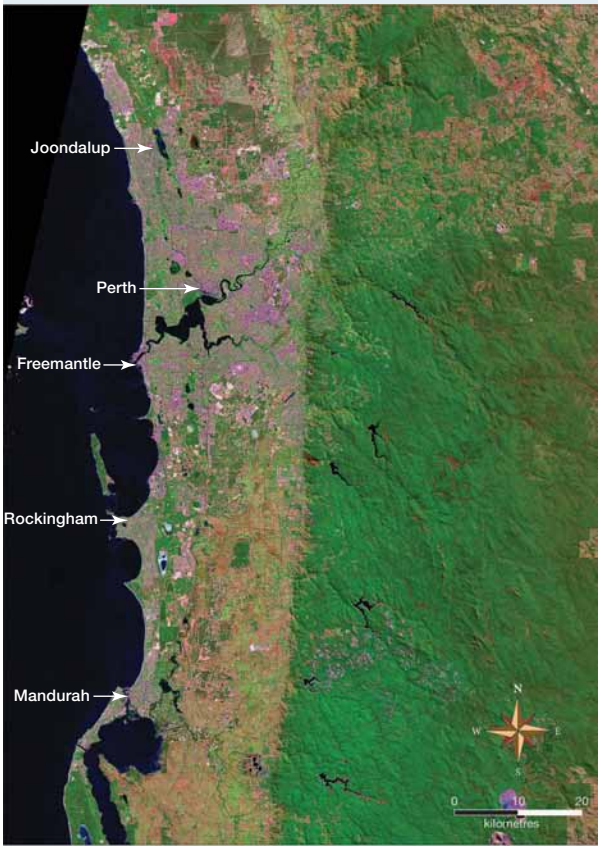
City	2023 population	Projected 2036	Projected 2066
Sydney	5 450 500	7 379 976	11 240 860
Melbourne	5 207 100	7 520 830	12 235 490
Brisbane	2 707 000	3 596 431	5 782 256
Perth	2 309 300	2 798 994	4 330 509
Adelaide	1 446 400	1 605 335	2 068 550
Hobart	253 700	297 085	466 752
Darwin	150 700	195 082	295 458
Total	17 991 300	23 393 733	36 419 875

Source: © Australian Bureau of Statistics

15.7.2 What are the consequences of a highly urbanised Australia?

When cities expand, the urban landscape invades the surrounding land, changing or removing natural ecosystems and swallowing up farmland. This expansion is known as **urban sprawl**. Perth in Western Australia is a very good example of a sprawling city. The metropolitan area of Perth extends approximately 120 kilometres from Alkimos in the north to Mandurah in the south (see **FIGURE 3**).

FIGURE 3 Perth's urban sprawl



As Perth has grown outwards, the coastal sand-dune systems have been cleared of vegetation. Sand dunes are easy to shape for residential development, and this has led to rapid and extensive north–south expansion along the coast. Inland from the sand dunes, wetland areas — where intensive agriculture such as market gardening (vegetables) and viticulture (grapes) once dominated — have also been absorbed by urban growth. These wetlands have often been reshaped to capture water run-off from new housing developments. The fertile soil has been lost forever.

Historically, urban areas were settled where the land was flat, the water and soil were good and the climate was temperate — in other words, where good farmland is located. When cities spread, the sprawl takes over arable land (land able to be farmed for crops). Urban sprawl has long-term effects, because it is very difficult to bring the soil back to its former state once the majority of the land has been used for buildings.

Many of Australia's cities, including Perth, have been called 'car cities' due to the reliance on private motor vehicles and road networks for transport. Perth's north-to-south morphology (shape) is reflected in its freeway system, which can become very congested. This has an impact on distances and commuting times for people travelling to and from workplaces.

15.7.3 The future for Australia

Australia's population will keep growing and changing, becoming more urban and older. This growth threatens the environment, causing loss of biodiversity, water shortages, more greenhouse gas emissions and food security issues. Cities face traffic congestion, housing problems and limited access to services, infrastructure and green spaces. To tackle these challenges, we need to plan for a growing population by building adaptable communities.

15.7.4 The rural lifestyle

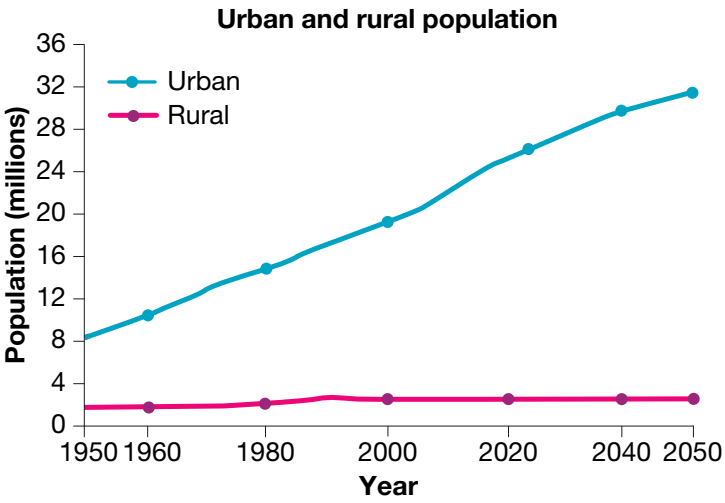
By 2050, about 93 per cent of Australians will live in urban areas. Some city residents will make a tree or sea change to rural or coastal areas. Rural populations are generally stable or decreasing as young people move to cities for jobs and education. Some rural communities maintain their populations by shifting from manufacturing to services, and as the COVID pandemic demonstrated, people can live remotely as a result of better internet and improving public transport.

SkillBuilder discussion

Geographical inquiry

1. Look at **FIGURE 4**. Describe the overall trend in this graph.
2. Explain why the majority of Australia's population growth has occurred in urban areas.
3. Discuss why the changes in work practices as a result of the COVID-19 pandemic may change the pattern represented in this graph.

FIGURE 4 Change in Australian urban and rural populations over time



15.7.5 Ecological footprint

The amount of productive land needed on average by each person (in the world or in a country, city or suburb) for food, water, transport, housing and waste management is known as an ecological footprint. It is measured in hectares per person per year. In 2016, the World Wide Fund for Nature (WWF) reported that the average global ecological footprint was 2.8 hectares per person. In 2014, Australia had an ecological footprint of 6.9 hectares per person. The United States had an ecological footprint of 8.4 hectares per person in 2014.

TABLE 2 Ecological footprints of Australian capital cities

City	Ecological footprint value (hectares/person/year)
Perth	7.66
Canberra	7.09
Darwin	7.06
Brisbane	6.87
Sydney	6.82
Adelaide	6.72
Melbourne	6.33
Hobart	5.50

15.7 SkillBuilder activity **GEOGRAPHICAL INQUIRY**

1. Use your atlas or online research to find an urban growth map for the capital city in your state or territory. **Describe** the change that has taken place over time. Using this map and a physical map of your state or territory, **predict** where future growth might occur. **Justify** your responses.
2. Use internet sources to find out how the ecological footprint in the United Arab Emirates compares to that of Australia. **Suggest** what would happen if all cities had such a high footprint.

15.7 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 7, 9	6, 8, 10

REMEMBER AND UNDERSTAND

1. **Identify** the percentage of Australians who live in urban areas.
   A. 32 per cent
   B. 50 per cent
   C. 89 per cent
   D. 95 per cent
2. **Identify** the percentage of Australians who live within 50 kilometres of the coast.
   A. 38 per cent
   B. 48 per cent
   C. 84 per cent
   D. 90 per cent
3. **Identify** the percentage of Australians who are projected to live in the capital cities by 2053.
   A. 20 per cent
   B. 33 per cent
   C. 60 per cent
   D. 72 per cent
4. **Explain** what is meant by the term *urban sprawl*.
5. Referring to **FIGURE 2**, **describe** the population distribution of Australia.

ANALYSE AND APPLY

6. Refer to **TABLE 1**. **Construct** a bar graph to show the predicted change in the populations of Australia's capital cities. **Explain** what your graph reveals.

EVALUATE AND COMMUNICATE

7. In your own words, **explain** the meaning of *ecological footprint*.
8. **Describe** why the expansion of Perth inland could pose a long-term problem.
9. **Suggest** how the expansion of Perth along a relatively narrow strip along the coast could pose a problem for transport in the future.
10. a. Refer to **TABLE 2**. **Compare** the ecological footprint data of Australian cities.
    b. **Contrast** these figures with the average global ecological footprint. **Propose** why Perth has a much higher ecological footprint than Hobart.

Answers and sample responses for this topic are available online.

LESSON 15.8 Urbanisation in Indonesia

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **explain** the causes of urbanisation and urban growth in Indonesia and another country
- **discuss** the impact of urbanisation on the environment in Indonesia
- **discuss** the economic, aesthetic and cultural consequences of urbanisation.

Tune in

Indonesia is one of Australia's closest neighbours — but what do we know about it?

Complete a mind map of what you already know about Indonesia and Jakarta. Consider where Indonesia is, who lives there, how many people live there and whether there are any tourist attractions.

FIGURE 1 Map of Indonesia

Source: Spatial Vision

15.8.1 Indonesia's population

Many people do not realise that the fourth most populated country in the world is one of our nearest neighbours. Like many countries in Asia, Indonesia has experienced rapid urban growth, but this has occurred only relatively recently. Indonesia's population of nearly 284 million people (2024) lives on an archipelago, a chain or cluster of more than 18 000 islands (see **FIGURE 1**). However, its population is not evenly distributed. Only about 11 000 of the islands are actually inhabited. Sixty per cent of Indonesia's population is concentrated on only seven per cent of the total land area — on the island of Java.

Indonesia has changed from a rural to an urban society quite recently. In 1950, only 15.5 per cent of its population lived in urban areas. In 2018, this had increased to 55.3 per cent.

Causes of urbanisation in Indonesia

More than one-third of Indonesia's urban growth is due to natural population increase. The population reached 100 million in 1962 and doubled to 200 million by 1997. In the early 1970s, the birth rate was high at 5.6 children per woman, but it dropped to 1.2 per cent by 2015. In 2023, nearly 4.4 million babies were born, almost the population of Melbourne.

Few restrictions on rural–urban migration led many rural poor to move to cities, often into slums, leaving families behind. Recently, about 20 000 foreigners per year have been obtaining work permits in Indonesia.

Investment, both local and foreign, mainly goes to large urban areas due to available workers, transport, water and electricity.

President Sukarno, the first president of Indonesia from 1945 to 1967, aimed to make Jakarta like Paris and New York, building broad avenues, highways, electric railways, luxurious housing, high-rise buildings, universities and industrial estates. The ambitious investment during this period increased the rate of urbanisation as rural people flooded into Jakarta to be part of this burgeoning metropolis.

FIGURE 2 Selected south-east Asian city populations, 1950–2030 projected

Source: United Nations, Department of Economic and Social Affairs, Population Division (2014). World Urbanization Prospects: The 2014 Revision, CD-ROM Edition.

SkillBuilder discussion

Communicating

1. **Identify** where the largest city in Indonesia is located.
2. **Discuss** any spatial associations you can identify on this map.
3. Study **FIGURE 2**. **Identify** the cities that have become megacities (greater than 10 million people).

FIGURE 3 The Jakarta metropolitan area had a population of over 10 million in 2023 and a population density of over 14 000 people per square kilometre.

15.8.2 Consequences of urbanisation

Growth of Jakarta

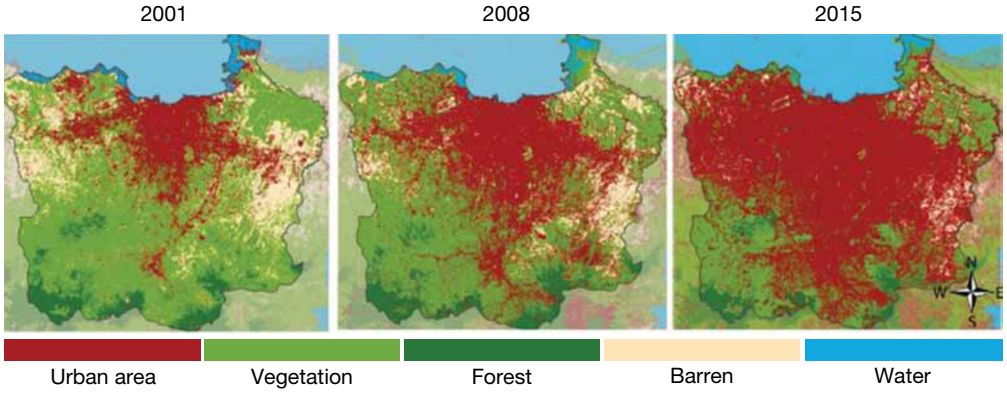
One of the consequences of urbanisation in Indonesia has been the dramatic growth of Jakarta, Indonesia's capital and largest city, located on the north-west coast of Java. The central island of Java is the world's most populous island, having a population density of 1000 people per square kilometre. The Jakarta Metropolitan Area (JMA) is now one of the world's largest urban areas. In 1930, Jakarta's population was around half a million people. By 1961 it had grown almost six-fold to 2.97 million. By 2005, it was almost 9 million. In 2019, the Special Capital Region of Jakarta had a population of almost 10 million, while the greater metropolitan agglomeration had a population of over 31 million.

SkillBuilder discussion

Communicating

1. Why can't Jakarta expand to the north?
2. Describe the expansion of Jakarta over this period. Ensure that you use direction in your discussion.
3. Discuss the potential problems that Jakarta's rapid expansion may cause.

FIGURE 4 Jakarta's urban growth



Loss of land

As Jakarta has urbanised, open green space has decreased from nearly 30 per cent in 1984 to less than 10 per cent in 2015, and around 4.5 per cent in 2023. Efforts are being made to ‘re-green’ the city.

Prime agricultural areas have turned into residential and industrial zones because urban land is more valuable.

Environment

Indonesia has low sewerage and sanitation coverage. Sewage from homes and industries, along with agricultural run-off, pollutes water sources. Air pollution is high due to traffic, industrial fumes and smoke from forest-clearing fires.

FIGURE 5 Impacts of Jakarta’s rapid growth

Air pollution or smog over the city

Significant traffic congestion

Labour force has moved from the country to the factories in the cities, resulting in a loss of labour force in rural areas.

Land for food production has been lost due to urban sprawl.

Subsidence and flooding. Many parts of Jakarta are sinking as the water table drops and more buildings are constructed.

There are plans to relocate the government buildings and much of the infrastructure to a new capital city in Borneo.

15.8 SkillBuilder activity GEOGRAPHIC INQUIRY

1. Use a map or atlas to **locate and label** these cities on outline map of Australia:
   - Sydney
   - Melbourne
   - Brisbane
   - Perth
   - Adelaide
   - Canberra.
2. Use a map or atlas to **locate and label** these cities on outline map of the USA:
   - New York
   - Los Angeles
   - Chicago
   - Houston
   - Phoenix
   - Washington D.C.
3. Where are most major cities located in each country?
4. What physical features influence where cities are built?
5. **Summarise** one similarity in city locations between Australia and the USA
6. **Summarise** one difference in how cities are spread across the countries.
7. **Explain** the spread of urban settlements in Australia compared to the USA with reference to differences in population size, key geographic features and land use.

15.8 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 4	5, 7	6, 8, 9

REMEMBER AND UNDERSTAND

1. **Determine** which of the following statements is **not** a reason why Indonesia has become very urbanised.
   A. There has been a sharp rise in population and increasing unrestricted migration from rural areas to urban cities.
   B. The first president of Indonesia wanted Indonesian cities to be like the world's great cities, and he constructed infrastructure and facilities.
   C. There has been a sharp drop in population and increased migration to rural areas.
   D. There has been heavy investment mainly in the large urban areas.
2. **Determine** whether the following statement is True or False.
   There is no interconnection between the increasing population in Indonesia and the subsidence of land.
3. **Explain** how and why Jakarta has become a major city within Indonesia and also on a world scale.
4. **Suggest** why you think people have moved from rural areas to urban areas within Indonesia.

ANALYSE AND APPLY

5. a. **State** Indonesia's current population. If the area of Indonesia is 1 904 569 square kilometres, **calculate** its approximate population density.
   b. **Compare** this to Australia's population density of 3.1 people per square kilometre.
   c. **Describe**, using statistics, how Indonesia has become very urbanised in a relatively short time.

EVALUATE AND COMMUNICATE

6. **Explain** what are the three main reasons that Indonesia has undergone such rapid urbanisation. Give reasons that **justify** your choices.
7. Urbanisation causes many harmful consequences to the environment. **Decide** which of the consequences of urbanisation may continue to have the biggest effects on the environment in the future.

8. **Discuss** how the urbanisation of Indonesia is similar to and different from the urbanisation of another country you have studied, such as Australia, China or the United States.
9. **Investigate** the start of the construction of the new capital city, Nusantara Capital City, in the East Kalimantan province of Indonesia. Present the pros and cons of such a dramatic move.

Answers and sample responses for this topic are available online.

LESSON 15.9 What are the advantages and disadvantages of urbanisation?

LEARNING INTENTION

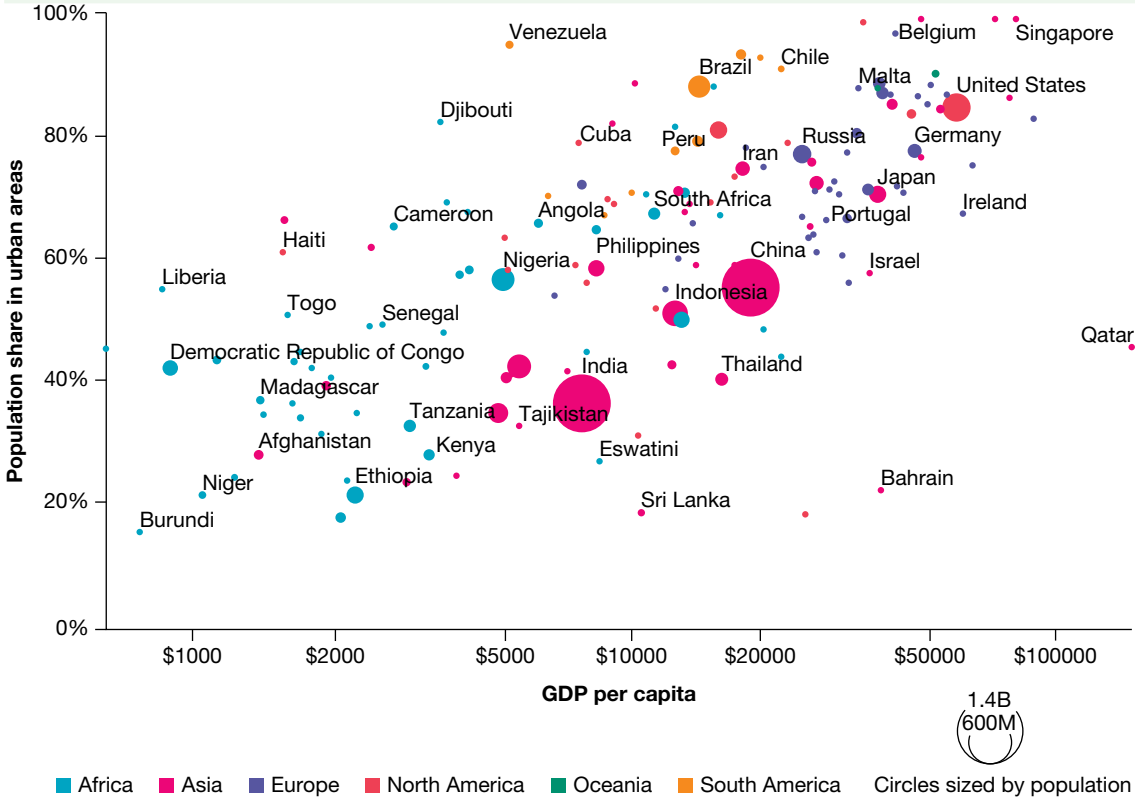
By the end of this lesson, you should be able to:

- **distinguish** between and **describe** the advantages and disadvantages of urbanisation
- **identify** and **discuss** conditions in urban slums.

Tune in

Geographers look for relationships between **variables**, such urban population and GDP per capita shown in this scatterplot. *Per capita* means per person. In the study of Geography, variables are defined as characteristics that can be measured and provide information about a place, beyond just the location.

FIGURE 1 Urban population vs GDP per capita, 2022



Based on the data shown in the FIGURE 1 scatterplot and drawing on your wider knowledge, what do you predict about the direction and strength of the relationship between urban populations and GDP?

15.9.1 What are the advantages of urbanisation?

Urbanisation has many benefits for both urban and rural residents. **Gross Domestic Product (GDP)** measures a country's wealth, and according to the World Bank, 80 per cent of global GDP is generated in cities.

FIGURE 1 shows that countries with higher urban populations tend to be wealthier. This is because cities offer better education and job opportunities, allowing people to earn and spend more, boosting GDP. Cities also foster new ideas and technologies, which can create wealth. Access to services like high-speed internet in cities helps with education, jobs and businesses.

On a personal level, city living provides more services and facilities than rural areas. With more people in a smaller area, it's easier to provide government support and facilities like housing, roads, public transport, hospitals and schools (see **FIGURE 3**).

FIGURE 2 Footscray in Melbourne has a large variety of restaurants, across a wide range of cuisines.

SkillBuilder discussion

Communicating

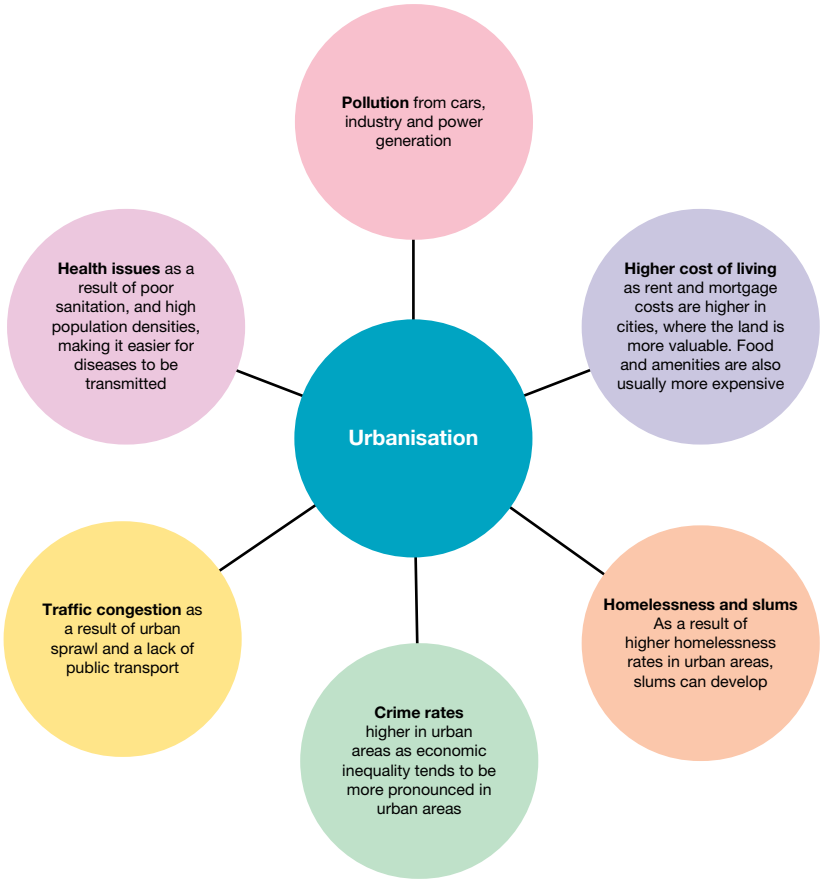
1. Why do most cities have some form of high-density housing?
2. Discuss why a good public transport system is important in urban areas.
3. Discuss why having a good health and education system contributes to rural–urban migration and thus urbanisation.

FIGURE 3 **(a)** Public transport, **(b)** Hospital, **(c)** School in New York, **(d)** High-rise housing in Brazil

There are also cultural and social advantages of urbanisation. Urban areas frequently have more sporting facilities, museums, galleries, theatres and playgrounds than rural locations do, as well as a greater variety of different cultures, their cuisines and their practices of living side-by-side (**FIGURE 2**).

15.9.2 What are the disadvantages of urbanisation?

FIGURE 4 There are many disadvantages of urbanisation.



SkillBuilder discussion

Concluding and decision-making

1. Rate the disadvantages listed above from most important to least important for the city you live in. Justify your decision.
2. Research the most recent crime rates and homelessness statistics for Melbourne. What are they and are they surprising?
3. Discuss with a partner any other disadvantages urban areas have that aren't included in this diagram.

15.9.3 What are slums and how do they develop?

When an urban area experiences an increase in people moving there, it may not have adequate infrastructure such as available housing and sanitation to accommodate the growing population.

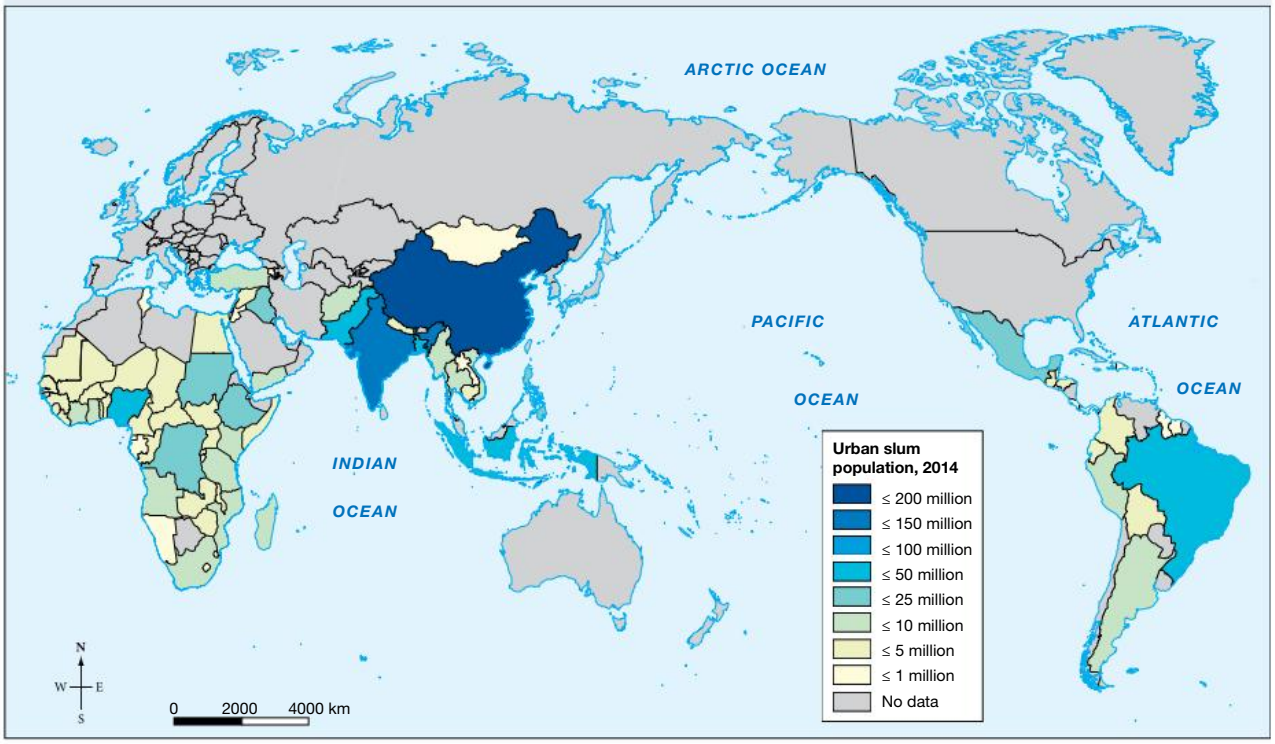
In many developing countries, urban growth has resulted in unplanned settlements called slums (other terms used around the world include ghettos, favelas, shantytowns, *bidonvilles* and *bustees*). Almost 1 billion people live in slums worldwide. The United Nations defines a slum as follows:

A person or a group of individuals living under the same roof in an urban area, lacking one or more of the following five amenities: (1) durable housing (a permanent structure providing protection from extreme climatic conditions) (2) sufficient living area (no more than three people sharing a room) (3) access to improved water (water that is sufficient, affordable and can be obtained without extreme effort) (4) access to improved sanitation facilities (a private toilet, or a public one shared with a reasonable number of people) (5) secure tenure and protection against forced eviction.

While urban slums are primarily a challenge for the developing world, areas of concentrated urban poverty also exist in the developed world in places such as many of the larger cities in the United States.

Some regions have more people living in urban slums than other regions, as illustrated by **FIGURE 5**.

FIGURE 5 Urban population living in slums, 2018



Source: Based on data from Urban population living in slums, 2014. Our World in Data. Licensed under CC BY 4.0. Map redrawn by Spatial Vision.

The images shown in **FIGURE 6** are examples of such slums from around the world.

SkillBuilder discussion

Concluding and decision-making

1. Suggest why many developing nations have slums.
2. With a partner, make a list of the negatives associated with living in a slum.
3. Propose what can be done to reduce the number of people living in slums globally.

FIGURE 6 Urban slums around the world: **(a)** Brazilian favela, **(b)** South African shantytown, **(c)** Indian slum, **(d)** Slovakian ghetto

15.9 SkillBuilder activity QUESTIONING AND RESEARCHING USING GEOGRAPHICAL METHODS

1. **Investigate** to create a list of the ten biggest urban slums in the world.
2. Plot the slums on a map. It will be helpful to also have an atlas to refer to.
3. **Annotate** your map with facts and images about each slum. Include in your annotation any government policies that try to improve the living conditions in each slum.

15.9 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 6	7, 8

REMEMBER AND UNDERSTAND

1. Determine whether the following statement is True or False.
   The higher the urban population, the richer the country and its people are likely to be.
2. In the study of Geography, variables are defined as _____ that can be measured and provide information about a _____, beyond just the _____ of that place.
3. **Identify** how much of global GDP is generated in cities according to the World Bank.
   A. 50 per cent
   B. 70 per cent
   C. 80 per cent
   D. 90 per cent
4. **Summarise** the main advantages of urbanisation for residents of cities.
5. Consider **FIGURE 1**.
   a. **Identify** a country that has less than 40 per cent urban population and GDP per capita between $1000 and $2000.
   b. **Identify** a country that has over 80 per cent urban population and GDP per capita between $50 000 and $100 000.

ANALYSE AND APPLY

6. Think about the last time you visited a city. You might live in one. **Identify** some of the cultural or social activities or events that you have access to in a city that you wouldn't have in a rural area.

EVALUATE AND COMMUNICATE

7. The more urban a country is, the wealthier it is likely to be. **Create** a mind map that illustrates the interconnections between reasons for this.
8. To what extent does urbanisation lead to the development of slums? Use examples to support your evaluation.

Answers and sample responses for this topic are available online.

LESSON 15.10 What are megacities?

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **identify** the difference between a city and a megacity
- **locate** megacities in the world
- **discuss** how megacities are merging to create megaregions.

Tune in

New York City is often referred to as the 'city that never sleeps'.

FIGURE 1 New York City

1. **What do you think this means? Why do you think people talk of New York City this way?**
2. **List four major problems that are faced in cities like New York City.**

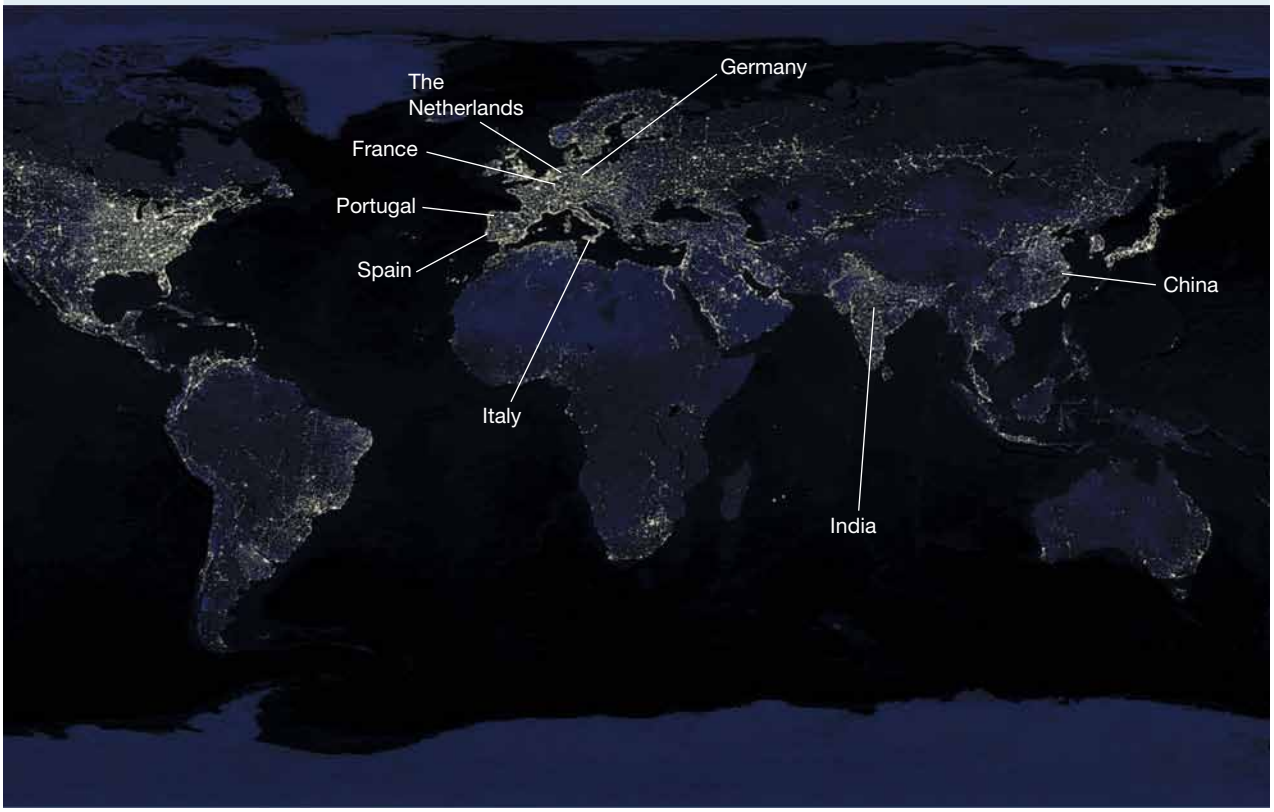
15.10.1 Where are cities located?

How is a city different from other urban areas such as towns and villages? A city is a large and permanent settlement, and is usually quite complex in terms of transport, land use and **utilities** such as water, power and sanitation.

The image of the Earth at night (**FIGURE 2**) shows the electricity grids around the world. The brightest areas on the map are the most urbanised, but might not be the most populated. If you compare this image with **FIGURE 3**, you can make some comparisons. For example, there are very bright lights in western Europe (Belgium, the Netherlands, France, Spain, Portugal, Germany, Switzerland, Italy and Austria) and yet more people live in China and India. Refer to your atlas to locate these countries.

Most cities are near coastlines and transport routes. Some areas are still sparsely populated and dark, like Antarctica, the jungles of Africa and South America, and deserts in Africa, Arabia, Australia, Mongolia and the USA. Forests in Canada and Russia, and the mountains in the Himalayas and Mongolia, are also mostly dark.

FIGURE 2 Satellite image of the Earth at night



SkillBuilder discussion

Geographical inquiry

1. Study the satellite image of the Earth. Which continent do you think is the most urbanised?
2. Describe the spatial distribution of cities in Australia.
3. As the world's population continues to increase, cities will spread into the darker regions shown in **FIGURE 2**. State whether you agree or disagree with this statement, providing reasons for your decision.

15.10.2 What is a megacity?

Over the next century, urbanisation is predicted to increase at an even greater rate than it has in the past. Around the year 1900, only 15 per cent of the world's population lived in cities. At some time in 2007, this reached 50 per cent. In 2022, this figure was 57 per cent, with projections expecting that two-thirds of the population will live in cities by 2050. People are attracted to cities with huge populations, and increasingly these cities are becoming megacities.

A **megacity** is a city with more than 10 million inhabitants. When you consider that Australia's population was almost 27 million in 2023 — with over 5 million living in Sydney and 5 million in Melbourne — it is hard to imagine what it would be like to live in a megacity.

The number of megacities has grown over time. In 1950, only two cities in the world — Tokyo and New York — had a population above 10 million. By 1975 there were four; by 2000 there were 17, and in 2024 there were 34. By 2030, it is predicted that there will be 43 megacities in the world. Nineteen of these cities have a population greater than 15 million.

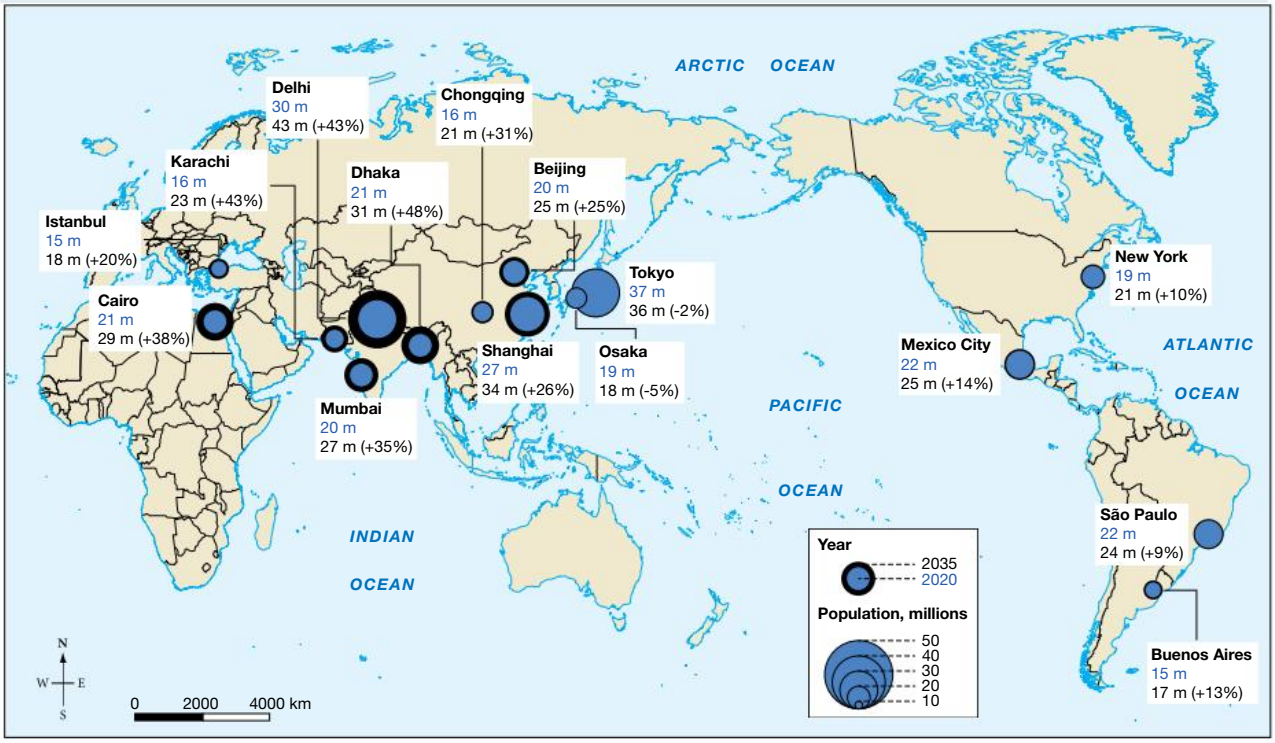
SkillBuilder discussion

Communicating

1. Describe the types of buildings that you can see in this image.
2. Discuss why Tokyo and most megacities have so many 'skyscrapers' in the central business district.
3. What might the darkened area in this photo be?

FIGURE 3 Tokyo, Japan

FIGURE 4 The world's megacities have experienced major growth



Source: Based on data from United Nations, Department of Economic and Social Affairs, Population Division (2019). World Population Prospects 2019, Online Edition. Rev. 1. Map drawn by Spatial Vision.

SkillBuilder discussion

Geographical inquiry

1. Identify the continent with both the largest and the fastest growing megacities.
2. Explain which two nations have the most megacities on this map.
3. Two of the megacities on the map have declining populations. Identify the two cities and research why this is the case.

The distribution of megacities — that is, where they are located over space in the world — has also changed. In 1975, two megacities were located in the Americas and two in Asia. In 2014 more than half (15) of all megacities were located in Asia; and it is predicted that, in 2030, 23 of the 41 megacities will be located in Asia. There is also a change in terms of the wealth of countries that contain megacities, with the majority now located in developing countries. By 2030, it is predicted that 23 megacities will exist in less developed countries.

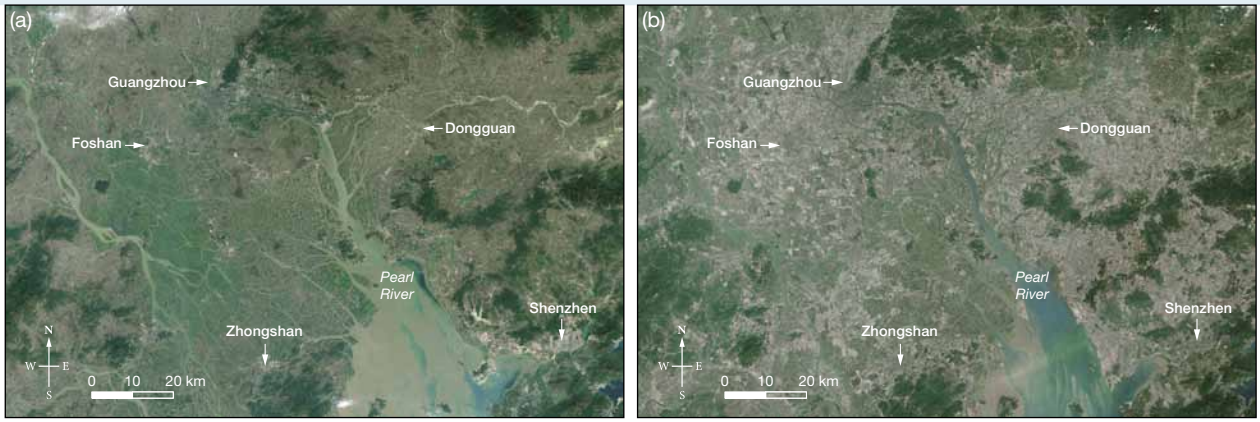
In some parts of the world, megacities are merging to create **megaregions**. These regions are home to huge populations. Examples of megaregions include:

- Hong Kong–Shenzhen–Guangzhou in China, already home to 65 million people
- Kyoto–Osaka–Kobe, with a population of approximately 19 million in 2015.

Pearl River Delta (PRD)

This region is located in southern China on the South China Sea. The PRD is one of the fastest-growing regions in the world. There are five major cities — Hong Kong, Shenzhen, Dongguan, Foshan and Guangzhou and six smaller cities made up of Macau, Zhaoqing, Zhuhai, Jiangmen, Huizhou and Zhongshan, which are linked by transport routes and provide great economic opportunities. Until 1979, Shenzhen was a fishing village. In 1980 the government declared the area to be a Special Economic Zone (SEZ), attracting businesses and investment from other countries. Since then, the area has undergone rapid urbanisation that has dramatically changed the landscape around the Pearl River Delta (see **FIGURE 5**).

FIGURE 5 Change in the Pearl River Delta between **(a)** 1988 and **(b)** 2014



Source: NASA ***Source:*** NASA

In 1988, the rivers and streams flowed through a fertile region with rice paddies, wheat fields, orchards and fish ponds. The region was mostly rural, and the population of roughly 10 million distributed between rural areas and a few cities.

By 2014, these cities had grown quickly and merged into an interconnected megalopolis with a population of 42 million. When combining the population of Hong Kong, the total is around 65 million.

Megacity facts

- Over half the future growth in megacities will be within Asia.
- The 20 largest cities consume 80 per cent of the world's energy and produce 80 per cent of global greenhouse gas emissions.
- **Slums** in megacities are especially vulnerable to climate change, as they are often built on hazardous sites in high-risk locations.

15.10 SkillBuilder activity GEOGRAPHICAL INQUIRY

1. **Research** population data for New York, Los Angeles, Sydney and Melbourne. For each city, **identify** the
   - population
   - population density.
2. Using your collected data, state whether each city is a megacity.
3. Working in pairs, answer the following:
   - What is a megacity?
   - Is there a megacity in Australia? **Explain** your answer.
   - **Compare** New York to Sydney. How do their roles and sizes differ?
   - Does Melbourne or Los Angeles show more urban concentration? Use data to **justify** your answer.
4. What are some of the major challenges faced by people living in megacities, and how might governments and communities work to solve them?

15.10 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4, 5	3, 6	7, 8, 9, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statement is True or False.
   Unlike a town or village, a city is a large and permanent settlement.
2. Identify the minimum number of inhabitants that a megacity has.
   A. 5 million
   B. 10 million
   C. 15 million
   D. 30 million
3. **Identify** which of these is considered a positive of living in a megacity.
   A. High levels of traffic
   B. High levels of employment
   C. High levels of diverse employment
   D. High levels of poverty
4. **Explain** what the bright lights in **FIGURE 2** show.
5. **Name** the first two megaregions and the countries where they are located.

ANALYSE AND APPLY

6. **Explain** what a megacity is. **State** how many megacities there were in 2024.
7. **Discuss** why megaregions develop.
8. **Outline** the environmental impacts of megacities and megaregions.

EVALUATE AND COMMUNICATE

9. **Describe** the changes to the Pearl River Delta from 1988 to 2014.
10. The 20 largest cities in the world consume 80 per cent of the world's energy and produce 80 per cent of the world's greenhouse gas emissions. **Propose** some solutions to this problem.

Answers and sample responses for this topic are available online.

LESSON 15.11 What are sustainable cities?

LEARNING INTENTION

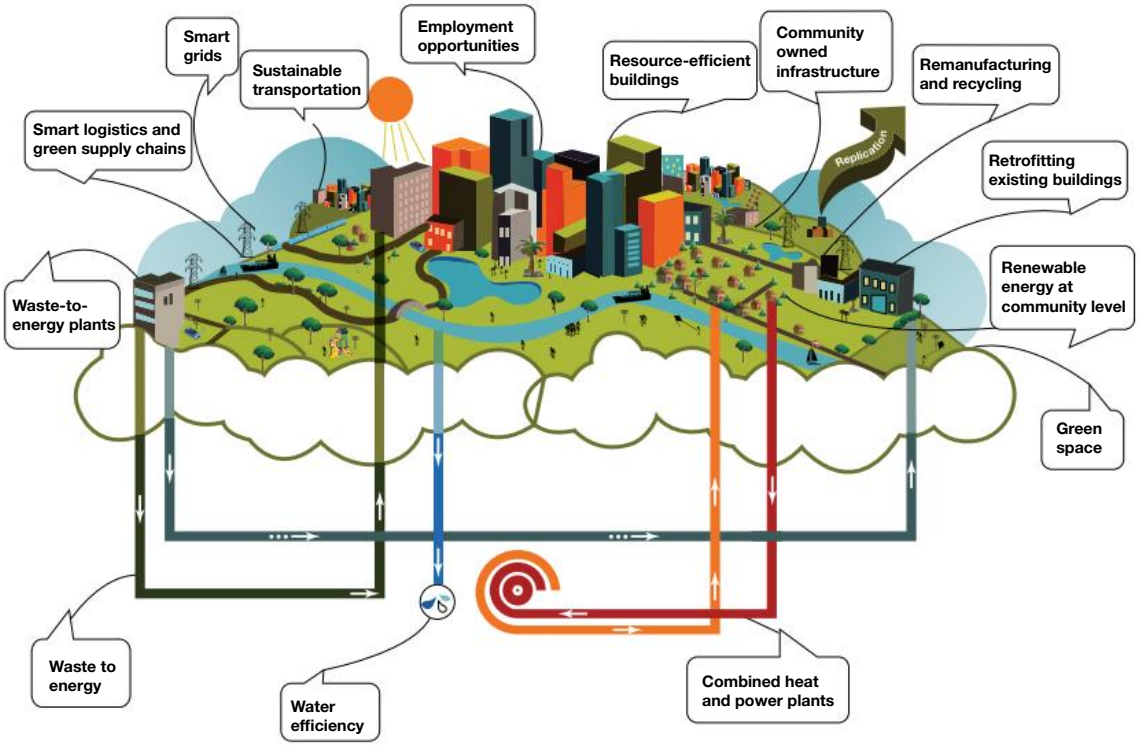
By the end of this lesson, you should be able to:

- **explain** how the concept of sustainability relates to cities
- **describe** features of sustainable cities
- **explain** how cities can be made more sustainable and liveable.

Tune in

Urban areas need to be carefully planned and developed in order to meet the needs of their current and future populations in a sustainable way. **FIGURE 1** illustrates some of the key features of a sustainable city.

FIGURE 1 Mapping components for a sustainable city



1. **What do you think is meant by the term *sustainable* as it relates to an urban area?**
2. **What are some suggestions for sustainable transport options?**
3. **What are some of the waste products produced by cities that could be remanufactured or recycled, and into what?**

15.11.1 What are sustainable cities and why are they needed?

With more people living in cities and the threats of climate change, cities need to be more sustainable to meet current and future needs. This is part of the **UN Sustainable Development Goal 11**: making cities inclusive, safe, resilient and sustainable.

A **sustainable city** or **eco-city** aims to reduce its environmental impact by using less energy and water, producing less waste, and cutting down on air and water pollution.

Cities face problems like inadequate housing, urban sprawl and pollution. Solutions work best when:

- governments, communities and citizens share responsibility
- communities are involved in projects and decision-making.

15.11.2 What makes a sustainable city?

In 2024, Arcadis, a Dutch firm that measures sustainability globally, conducted a study to measure the sustainability of the world's top 100 cities. Four Australian cities rated in the top 100: Perth (25), Melbourne (32), Sydney (33) and Brisbane (38).

The indicators measured by the following criteria:

- *Planet* (environmental factors) — air quality, **waste management**, water, greenhouse gas emissions, green policy and biodiversity
- *Profit* (business environment factors) — affordability, city connectivity and congestion and living standards
- *People* (social factors) — livability, access to education, public transport
- *Progress* (measures progress made over the last decade) — public participation, government policies, indicators of improvement
- **FIGURE 1** highlights some of the key features of a sustainable city.

15.11.3 What actions are involved in developing sustainable cities?

Urban planners and governments can take a number of targeted actions in order to make their cities more sustainable. Some of these actions are outlined in **TABLE 1**.

TABLE 1 Targeted actions to make cities more sustainable

Key feature	Targeted actions
Conservation of water	• Capture and use of stormwater • Monitoring of infrastructure for leaks • Treatment and reuse of waste water • Incentives for saving water for businesses and individuals
Improved waste management	• Recycling programs • Composting programs • Repurposing of materials such as building waste • Generating heat from waste incineration (burning waste)
Use of green architecture	• Using sustainable and/or recycled building materials • Improving insulation and ventilation for natural heating and cooling • Incorporating renewable energy sources, e.g. solar panels
Urban farming	• Establishment of community gardens • Encouraging schools and restaurants to grow food • Creating vertical and rooftop gardens

Green public spaces	• Creation of parks, nature reserves and recreational areas for public use • Urban greening programs to reduce heat island effect
Use of renewable energy	• Use of energy sources that don't rely on fossil fuels • Establishment of solar and wind farms • Providing rebates or incentives for private owners to install solar panels
Sustainable transport options	• Creating more bike paths and cycle superhighways • Improving public transport options • Reducing public transport emissions by lowering use of fossil fuels • Installing EV (electric vehicle) charging stations to encourage use of electric cars

SkillBuilder discussion

1. Discuss with a partner or group. Which of the actions listed in **TABLE 1** you see in your own suburb?
2. Using the list above, create a list of 'top five' of actions that you think can easily be adopted by governments.
3. Discuss five of the actions above that your school community should adopt.

15.11.4 What do some of these actions look like in the real world?

Urban greening program, Sri Lanka

Producing food in cities provides people with an income and improves local environments, as well as reducing the distance that food must travel to a consumer — 'food miles'. With support from the Department of Agriculture, the Department of Education and the Youth Services Council, three city councils in Sri Lanka developed a program of community environmental management that led to the creation of 300 home gardens and 100 home-composting programs. It also helped organise and empower community groups, and the idea has now spread to many other municipalities in the country.

FIGURE 2 The urban greening program in Sri Lanka has been a success in many communities.

Solar panels in Vatican City and Japan

Vatican City, Italy

Vatican City is the world's smallest independent state. In 2008 more than 2000 photovoltaic panels were fixed to the roof of one of the city-state's main buildings — the roof of the Paul VI Hall — enabling the Vatican to cut its carbon dioxide emissions by about 225 tonnes a year. The 2400 panels heat, light and cool the hall and several surrounding buildings, producing 300 kilowatt hours (MWh) of clean energy a year.

Ota, Japan

Ota is located 80 kilometres north-west of Tokyo and is one of Japan's sunniest locations. Through investment by the local government, Ota is one of Japan's first solar cities — three-quarters of the town's homes are covered by solar panels that have been distributed free of charge.

Waste incineration in Vienna

A waste incineration and heat generation plant is part of a hard-waste management system in Vienna, Austria (see **FIGURE 3**). This plant became the first in the world to burn waste that cannot be recycled and use the energy generated by the plant in a heating network.

The plant burns more cleanly and produces more heat and energy than many other waste generation plants, making it attractive to many urban communities. Each year, waste is turned into heat and electricity and supplies heating and hot water for 350 000 apartments — around a third of the city's total. Landfill waste has been reduced by 60 per cent in the city.

FIGURE 3 Spittelau waste treatment plant in Vienna, Austria. This power station burns waste, thus reducing landfill, to produce heat that is supplied to thousands of buildings.

Green architecture in Japan

The ACROS Fukuoka building located in Fukuoka, Japan, is an example of plants and greening being used to enhance a building (**FIGURE 4**). The terraced green roof and green walls merge with a park and contain around 35 000 plants. The green roof keeps the temperature inside more constant and comfortable, thus reducing energy consumption.

It is also able to capture rainwater run-off and attracts insects and birds. In addition, it is visually appealing and attracts many people to the surrounding park.

FIGURE 4 The ACROS Fukuoka building located in Fukuoka, Japan

Sustainable housing in Melbourne

The Commons is a sustainable housing project located in Brunswick, Melbourne, designed with an emphasis on environmental responsibility and community wellbeing. Developed as part of a larger trend toward eco-friendly urban living, the project features a range of sustainable design principles aimed at reducing its environmental footprint. The Commons incorporates energy-efficient technologies and environmentally friendly materials, creating a model for sustainable housing in urban areas.

Some of the key sustainable features of the Commons include:

- solar panels on the roof, which generate renewable energy for the building, and rainwater harvesting systems that reduce reliance on the municipal water supply
- a building design to maximise natural light, reducing the need for artificial lighting and lowering energy consumption
- high-quality insulation materials to improve energy efficiency and reduce heating and cooling costs
- green spaces that are integrated throughout the development, promoting biodiversity and providing residents with access to nature in an urban environment.

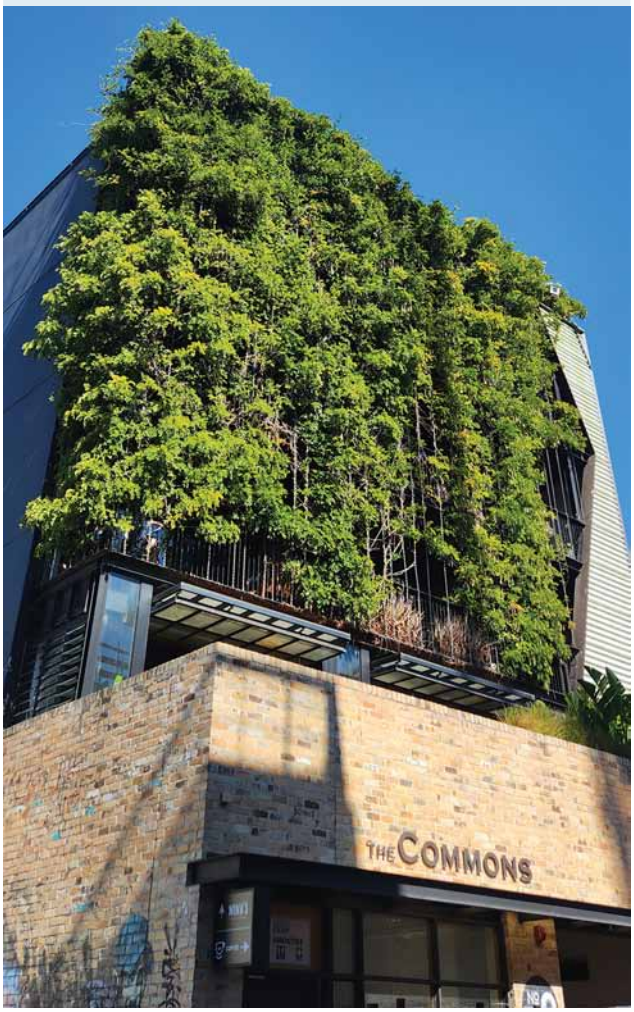
The project also encourages community interaction and sustainable living practices, making it a noteworthy example of eco-friendly urban development.

SkillBuilder discussion

Concluding and decision-making

1. Refer to **FIGURE 5**. Identify the key sustainable designs used in the Commons.
2. Explain the way this project seeks to reduce greenhouse gas emissions.
3. Explain the efforts that have been made to make this site more biodiverse.

FIGURE 5 The Commons, a sustainable housing project

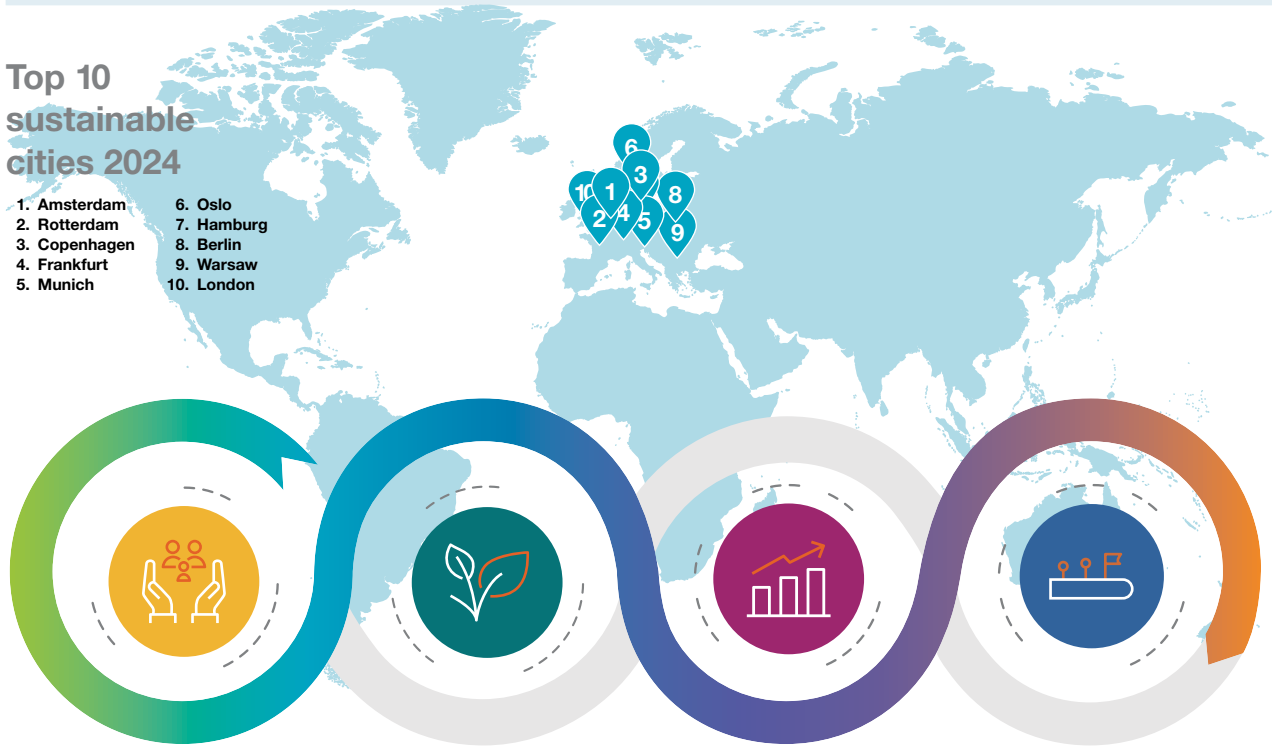


15.11.5 What are some of the most sustainable cities in the world?

Every few years the sustainable design consultancy Arcadis completes a Sustainable Cities Index, where it ranks the world's cities based on four pillars of sustainability: people, planet, profit and progress.

FIGURE 6 shows its results for the top 10 cities in 2024 based on the combined scores.

FIGURE 6 A map of the most sustainable cities in the world based on the Arcadis Sustainable Cities Index 2024



People

Measures social performance and quality of life for citizens, with indicators including:

- Personal well-being (health, education, crime levels)
- Working life (income inequality, work-life balance)
- Urban living (reliability of public transport infrastructure, broadband, Wi-Fi availability).

Planet

Measures environmental factors, with indicators including:

- Immediate needs of citizens (air pollution, green spaces, waste management)
- Long-term impacts (energy production and consumption, greenhouse gas emissions)
- Investment in low-carbon infrastructure (renewable energy, sustainable mobility)
- City resilience (natural disaster risk and resilience)
- Green policy.

Profit

Measures business environment factors, with indicators including:

- Access to workforce (affordability and living standards)
- Ease of commute (city connectivity and congestion)
- Business infrastructure (access to reliable electricity and internet)
- Economic performance (ease of doing business, economic development, employment).

Progress

Measures sustainable progress using key indicators from the Planet, People, and Profit pillars that can be tracked over a 10-year period:

- Planet: drinking water and sanitation, air pollution, energy
- People: health, income inequality, public transport services, education
- Profit: income and living standards, employment.

Top 10 cities based on People

1. Paris
2. Vienna
3. Athens
4. Warsaw
5. Seoul
6. Prague
7. Tokyo
8. Oslo
9. Edinburgh
10. Hamburg

Top 10 cities based on Planet

1. Oslo
2. Copenhagen
3. Berlin
4. London
5. Rotterdam
6. Amsterdam
7. Frankfurt
8. Munich
9. Hamburg
10. Edinburgh

Top 10 cities based on Profit

1. Amsterdam
2. San Francisco
3. Dallas
4. Stockholm
5. Dublin
6. Chicago
7. Houston
8. Zurich
9. New York
10. Seattle

Top 10 cities based on Progress

1. Jakarta
2. Kinshasa
3. Chengdu
4. Wuhan
5. Guangzhou
6. Shanghai
7. Beijing
8. Tianjin
9. Shenzhen
10. Rotterdam

15.11 SkillBuilder activity CONCLUDING AND DECISION-MAKING

Visit the **Arcadis Sustainable Cities Index** to see how Australian cities performed in 2024 in measurements of sustainability. These measurements are broken up into the categories of: planet, people, profit and progress.

1. Form groups of three to five students.
2. Individually examine the data presented and select one indicator from each category that you think is the most important (e.g. biodiversity for environmental performance).
3. Share your ideas with your group — did your peers select the same indicators or different ones? Share the reasons for your choices.
4. Now select a focus city to **discuss** in more detail. **List** five things that could improve sustainability in this city.
5. **Outline** two actions that you could personally take to make a difference.

15.11 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 6	4, 5, 7	8, 9, 10

REMEMBER AND UNDERSTAND

1. **State** the aims of a sustainable city.
2. **Identify** which of the following is an indicator of *sustainability*.
   - A. Quality of life
   - B. Public participation
   - C. Ecological footprint
   - D. Education
   - E. All of the above
3. Refer to **FIGURE 6** to determine whether the following statements are True or False.
   - a. Paris was ranked number 9.
   - b. Three US cities feature on the list.
   - c. There are no cities from Australia that are considered sustainable.
   - d. The majority of sustainable cities on this list are in Europe.
4. Define *sustainability*.

ANALYSE AND APPLY

5. **Identify** any elements of the urban greening program in Sri Lanka that categorise it as sustainable.
6. **Determine** how the urban solar programs in Vatican City and Ota, Japan contributed to sustainable solutions.

EVALUATE AND COMMUNICATE

7. **Summarise** how burning waste in Vienna has become a sustainable solution.
8. Imagine that you are an urban planner responsible for improving the sustainability of your city. Of the key features of a sustainable city outlined in **TABLE 1**, you can only afford to implement two. **Identify** which of these features you would choose. **Justify** your reasoning.

Answers and sample responses for this topic are available online.

LESSON 15.12 Inquiry: Planning Australia's newest sustainable city

LEARNING INTENTION

By the end of this lesson, you should be able to:

- **demonstrate** a comprehensive understanding of the physical geographic requirements to sustain the population of a city
- **apply** geographical skills to design a new city
- **examine** and **evaluate** the relative merits of sustainability policies.

Background

Canberra, Australia's capital, is a planned city. That is, the way it is structured and designed was not by chance. Unlike other cities in Australia, which gradually grew and changed over time, Canberra's design was laid out by its initial designer, Walter Burley Griffin.

Now, as Australia's population grows, the movers and shakers in the capital want a new capital city to be built. And like Canberra, they've created a competition for people to submit their plans for the new capital.

Working in pairs or small groups, your task is to design a new sustainable capital city for Australia. For the purposes of this exercise, you can choose a location where a small town currently exists.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching using geographical methods

Research a location for your new city. You can use Google Earth or your Atlas but you should ensure you have the following:

a. Water supply (major river, lake or dam)
b. A suitable climate
c. Access to resources that can be used to provide employment. These could include fertile soil, valuable minerals, geographic features that could attract tourists and so on.
d. Access to trade and transport to the rest of Australia, such as major highways and potential port facilities
e. Sources of renewable energy that your city will use.

Step 2: Interpreting and analysing geographical data and information

After analysing your data from step one, you will need to decide on the location of your sustainable city. Take into consideration the topography and geography of your location. For example, rivers and mountains will need to be taken into account.

Step 3: Concluding and decision-making

Using the information you have gathered during Step 1, you will need to decide on the following key aspects of your city:

a. Where you will locate your central business district
b. A suitable population for your city (it must be a minimum of 500 000 inhabitants)
c. The transport system for your city. Remember this is to be a sustainable city and thus your public transport system needs to be comprehensive. Think about your combination of railways, electric car networks, bike trails, underground transport links, drone transport hubs. Be creative!
d. The sustainable technologies and environmentally friendly aspects of your city, including power supply, urban forests, rubbish disposal/recycling

Step 4: Communicating

It's now time to prepare your submission. You'll be presenting your new city as a poster or presentation. You will need to include:

a. the name of your city
b. the location of your city
c. maps of where your city is located
d. the printouts of the population data to support the placement of the city in that location
e. anything else that you think will make your city proposal the winning entry. Make your city brilliant. Include things like:
   - Indigenous cultural/historic sites depending on your initial location
   - universities
   - interconnectivity and accessibility to technology
   - zoos
   - sporting facilities
   - ports
   - airports
   - theatre districts, tourism destinations
   - be creative, think about the location of your city and what you can do to make it special.

Complete your self-assessment using the **Inquiry rubric** or access the 15.12 exercise set to complete it online.

LESSON 15.13 Investigating topographic maps – Jakarta

LEARNING INTENTION

By the end of this lesson, you should be able to **identify** land heights and features across Jakarta on a map.

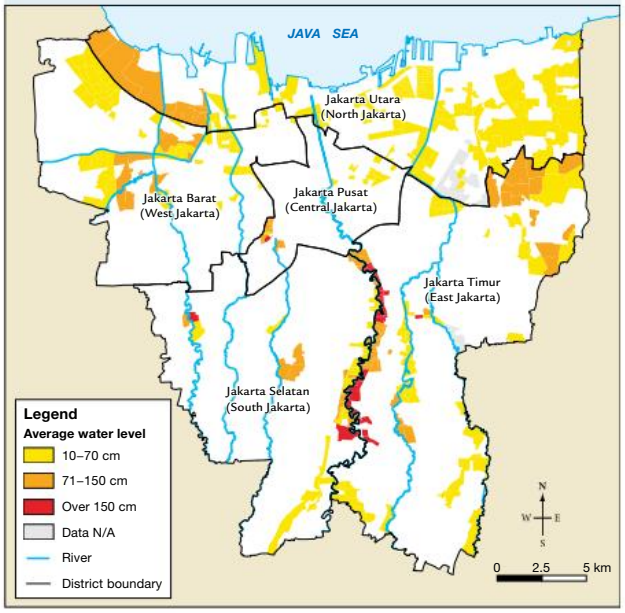
15.13.1 Urbanisation in Jakarta

Jakarta is situated on flat lowlands on the northern coast of Indonesia's West Java province. The city has expanded rapidly; in central areas, it has a population density of about 18 500 people per square kilometre.

Jakarta has regularly experienced flooding as a result of a combination of factors including:

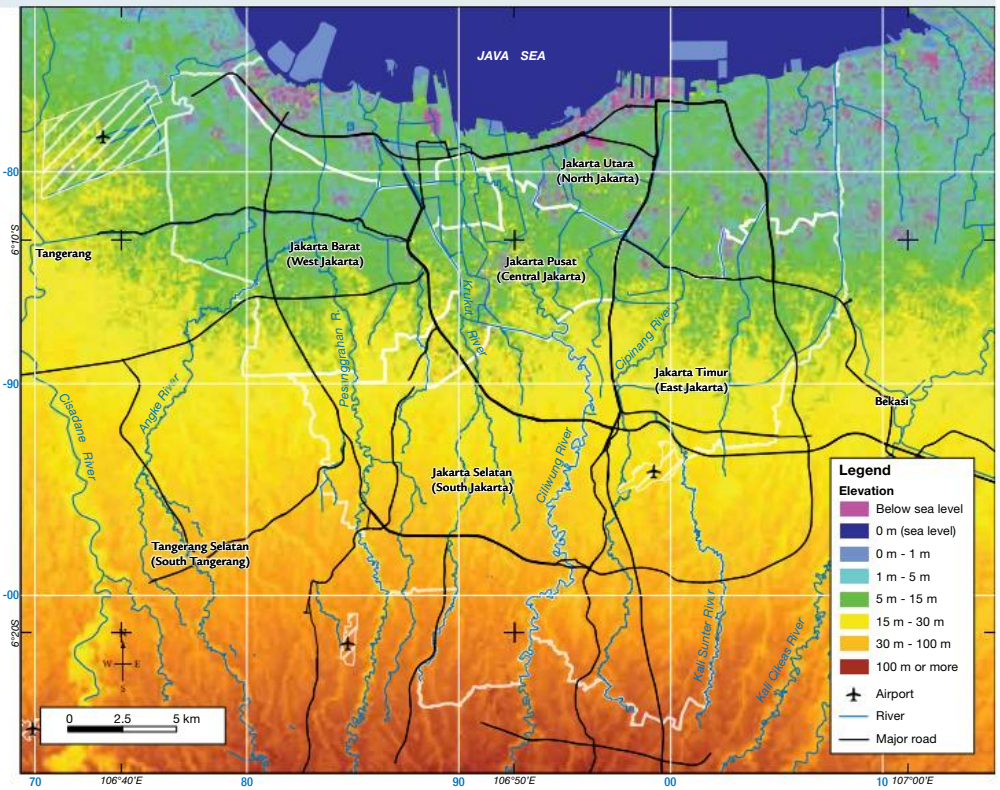
- heavy wet-season rainfall
- low relief and land sitting below sea level
- shallow rivers that easily flood
- rubbish deposits in river beds.

FIGURE 1 Areas of Jakarta that experienced severe flooding in January 2014



Source: Based on OCHA/ReliefWebSource: ReliefWeb/OCHA Indonesia Jakarta 2014 https://reliefweb.int/sites/reliefweb.int/files/resources/Update on Jakarta Flood as of 21Jan2014-R.pdf.

FIGURE 2 Thematic map of land heights in Jakarta



Source: Map data © OpenStreetMap contributors, https://openstreetmap.org. Data is available under the Open Database Licence, https://opendatacommons.org/licenses/odbl/; elevation data sourced from USGS.

FIGURE 3 The extensive flooding in Jakarta

FIGURE 4 The flooding severely impacted homes.

15.13 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2	3, 4	5, 6

REMEMBER AND UNDERSTAND

1. **Describe** the location of Jakarta.
2. **List** four reasons why Jakarta regularly floods.
3. Give an area reference for one part of Jakarta that you think would be particularly prone to flooding. Give reasons to **justify** your choice.

ANALYSE AND APPLY

4. If residents in Jakarta are banned from accessing groundwater, **identify** any other natural sources from which they could obtain drinking water.
5. If you were given the task of moving residents whose homes will be underwater in the next 20 years, **identify** which areas would be your first priority. Provide the area or grid references and reasons for your choice.

Answers and sample responses for this topic are available online.

LESSON 15.14 Review

15.14.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

15.2 What is migration?

- Migration is when people move from one place to settle in another.
- Migration types can be categorised by time, location and degree of choice.
- Push and pull factors influence decisions to migrate.
- Push factors are unfavourable qualities or conditions that make people want to leave a place.
- Pull factors are desirable qualities or conditions that attract people to a new place.

15.3 Where are people moving to and from?

- Emigrants are leaving a country; immigrants are entering a country.
- Annual net migration takes into account the difference between the number of people who move into a country and the number who leave it over the course of a year.
- Push and pull factors influencing international migration can be broadly categorised as social, economic, political or environmental.
- The majority of international migrants to Australia are from Europe or Asia due to the cultural connection and/or geographic convenience.
- Migrants come to Australia for a large variety of reasons.

15.4 Why do people migrate within countries?

- Within Australia, people move for employment reasons as FIFO or seasonal workers, or for a more relaxed lifestyle via a sea or tree change.
- Within China, employment reasons motivate labourers to move from rural areas to coastal cities for work in factories and technological industries.
- Internal displacement is when people are forced to move, rather than voluntarily moving.
- Conflict and natural disasters are the two main factors behind incidences of internal displacement.

15.5 Inquiry: A migration story

- To gain an understanding of the reasons people migrate
- Develop an awareness of the impact of migration on the destination country
- Understand how emigration impacted the nation that the subject left

15.6 Urbanisation and urban growth

- Cities first developed around 5000 years ago in Mesopotamia.
- Industrialisation during the nineteenth and early twentieth centuries saw the global urban population increase dramatically.
- Urban growth has not occurred evenly around the world; Africa and Asia remain less urbanised in comparison to Europe and North America, though this is changing rapidly.
- Australia and the United States both have a number of conurbations.

15.7 Urbanisation in Australia

- Australia is one of the most urbanised nations in the world.
- The consequences of a highly urbanised Australia include the loss of surrounding farmland, a loss of biodiversity and an increased use of cars and thus traffic congestion.
- In recent years we are increasingly seeing the advent of people leaving the cities for a sea or tree change.

15.8 Urbanisation in Indonesia

- Rural–urban migration and natural population increase have changed Indonesia's population over time.
- Jakarta has experienced rapid population growth over time.
- Jakarta has a major subsidence issue that is leading to a number of health and safety issues.

15.9 What are the advantages and disadvantages of urbanisation?

- The higher the urban population percentage, the wealthier a country tends to be in terms of GDP.
- Urbanisation brings more education, employment and enterprise opportunities that benefit individuals and communities.
- It is easier to provide and access services such as healthcare, transport, housing and education when people live in concentrated areas.
- Urban areas tend to have disadvantages such as more pollution, higher crime rates, easier transmission of disease and a higher cost of living.
- Urban slums can develop when population growth results in unplanned settlements that existing infrastructure cannot support.

15.10 What are megacities?

- Most of the world's cities are located on coastlines or transport routes.
- Megacities are classified as cities with a population of over 10 million people.
- Most megacities are in Asia.

15.11 What are sustainable cities?

- To meet the needs of both existing and future populations, cities need be planned and developed to be more sustainable.
- To be sustainable, a city needs to reduce its environmental impact and support the quality of life of its inhabitants.
- Key features of sustainable cities include the use of renewable energy, the conservation of water, improved waste management and a reduction in the use of cars as transport.

15.12 Inquiry: Planning Australia's newest sustainable city

- Develop a comprehensive understanding of the physical geography required to support a city.
- Utilise and develop geographical skills to design a new city.
- Understand and evaluate the relative merits of sustainability policies.

15.13 Investigating topographic maps — Jakarta

- Jakarta regularly experiences flooding as a result of a combination of factors such as being situated on flat lowlands, having shallow rivers that can overflow and having heavy wet-season rainfall.

15.14.2 Key terms

conurbation area when cities merge to form one continuous urban area
ecological footprint the amount of productive land needed on average by each person in a selected area for food, water, transport, housing and waste management
emigrants people exiting a country of origin
fly-in fly-out (FIFO) a system in which workers fly to work, in places such as remote mines, and after a week or more fly back to their home elsewhere
immigrants people moving into their destination country
internal displacement when people are forced to leave their homes due to conflict or environmental disasters, but remain within their country's borders
internal migration migration within a country
megacity a very large city with a population of at least 10 million people
megaregions megacities merge to form these

migrant a person who leaves their own country to go and live in another
migration moving from one country to live in another
population density the number of people living within one square kilometre of land; it identifies the intensity of land use or how crowded a place is
population distribution the pattern of where people live; population distribution is not even — cities that have high population densities and remote places such as deserts usually have low population densities
pull factor favourable quality or attribute that attracts people to a particular location
push factor unfavourable quality or attribute of a person's current location that drives them to move elsewhere
sanitation facilities provided to remove waste such as sewage and household or business rubbish
sea change movement of people from major cities to live near the coast to achieve a change of lifestyle
slum a run-down area of a city characterised by poor housing and poverty
sustainability meeting the needs of the present without compromising the ability of future generations to meet their own needs
tree change movement of people from major cities to live near the forest to achieve a change of lifestyle
urban relating to a city or town; the definition of an urban area varies from one country to another depending on population size and density
urban sprawl when cities expand, the urban landscape invades the surrounding land, changing or removing natural ecosystems and swallowing up farmland. This expansion is known as urban sprawl.
urbanisation the growth and expansion of urban areas and the increasing proportion of people living in urban areas as compared to rural areas
utilities services (such as power or water) provided by the government or private suppliers
variables (in Geography) characteristics that can be measured and provide information about a place, beyond just the location of that place

15.14.3 Reflection

Reflect on your learning using the activities and resources provided.

Why do people move between and within countries, and how are our urban environments changing to provide a sustainable future?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning on this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry questions, outlining your views.

learnon

Post-test	Online Post-test
eWorkbooks	Customisable worksheets for this topic Reflection
Video eLesson	Urbanisation and migration

15.14 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4, 6, 7, 9, 11, 14, 17	3, 8, 10, 12, 13, 16	5, 15, 18

REMEMBER AND UNDERSTAND

1. Explain the meaning of the term *urbanisation*.
   A. Movement of people from urban to rural areas
   B. Growth and expansion of rural areas
   C. Lower population densities in urban areas
   D. Growth and expansion of urban areas
2. Explain why people might migrate to Australia.
   A. Political stability
   B. Employment/jobs
   C. Family reunions
   D. All of the above
3. Positive net migration means that:
   A. more people have moved to a country than have left it.
   B. more people have left a country than have moved to it.
   C. there has been no difference between the number of people moving to a country and the number of those who have left it.
   D. the people who have migrated had a positive experience.
4. Identify which places in Australia tend to have the greatest population densities.
   A. Inland regional and remote areas
   B. Capital cities
   C. Along the coast
   D. Eastern Australia
5. Identify which of the following statements is correct.
   A. Per capita income is the only determinant of urbanisation.
   B. Generally, countries with a high per capita income tend to be more urbanised.
   C. Countries with a high per capita income are generally more rural.
   D. Generally, countries with a low per capita income tend to be more urbanised.
6. Slums are a challenge of rapid urbanisation in many developing countries. Explain what a slum is.
   A. A planned settlement in an urban area
   B. An unplanned settlement in an urban area
   C. An unplanned settlement in a rural area
   D. A planned settlement in a rural area
7. Determine which of the following are problems that result from rapid population growth in urban areas. Select all possible answers from the options below.
   A. Poverty
   B. Employment
   C. Non-crowded public transport
   D. Air pollution
   E. Poor sanitation
8. Identify where the world's cities are generally located. Select all possible answers from the options below.
   A. Inland
   B. Along the coastline
   C. Close to transport routes
   D. In mountainous areas

9. Identify which of the following is not a sustainable urban project.
   A. Beekeeping
   B. Planting community gardens
   C. Increasing infrastructure and car manufacturing
   D. Recycling building materials
   E. Solar panels
10. Rapid growth of cities can lead to social and environmental problems. Often there is insufficient affordable housing, resulting in the build-up of slums.
    Identify which of the following would *not* be a characteristic of a slum.
    A. High population density
    B. A lack of water and sanitation
    C. Efficient public transport network
    D. Temporary housing structures

ANALYSE AND APPLY

11. **Classify** each of the following as either push or pull factors that have resulted in urbanisation.
    a. Job opportunities
    b. Political or religious freedom
    c. Natural disasters
    d. Lack of medical services or educational opportunities
    e. War
    f. Family links
12. Drawing on your own knowledge and your understanding of sea changes, tree changes and other forms of migration, **explain** how the COVID-19 pandemic has affected migration patterns within Australia (i.e. between states or within states).
13. **Distinguish** between emigration and immigration and provide an example.
14. Consider the capital city or regional city you live closest to. **Discuss** three actions that could be implemented to make this urban area more sustainable in the short term.
15. **Explain** how Australian cities can become more sustainable and why this is important.

EVALUATE AND COMMUNICATE

16. Imagine that you are the mayor of a rapidly growing urban area where there is high natural population growth and an increase in people migrating to the area. After examining how urban slums develop, **propose** some actions you could take to prevent this from happening.
17. **Explain** what a megacity is and discuss why the majority of megacities are located in Asia.
18. **Evaluate** the impact of migration on Australia since 1900. Ensure you discuss the changes in time of migration policies and the sources of migration to Australia.

Answers and sample responses for this topic are available online.

16 Civics and Citizenship concepts and skills

LESSON SEQUENCE

16.1 Overview 486
16.2 Civics and Citizenship concepts and skills 488
16.3 SkillBuilder: Investigating contemporary civics and citizenship issues ..... online only
16.4 SkillBuilder: Evaluating democratic institutions and systems ..... online only
16.5 SkillBuilder: Participating in civic processes ..... online only
16.6 SkillBuilder: Communicating ..... online only
16.7 Review 493

LESSON 16.1 Overview

Why is it important important to study Civics and Citizenship, and what skills do I need?

As a student of Civics and Citizenship, you are developing the knowledge and skills that will be needed by you and society now and into the future. In your study of Civics and Citizenship, you will cover topics on Australia's democratic systems of government and the justice system.

Studying Civics and Citizenship may be necessary for your chosen career, or may help indirectly by giving you broader knowledge and skills, especially in the understanding of government and legal systems. You will also learn about your rights and responsibilities, such as the right to publicly express your views and the responsibilities and expectations that come with that right.

learnon

- **Pre-test**
  Online pre-test
- **eWorkbook**
  Customisable worksheets for this topic
- **Digital document**
  Key terms glossary
- **Video eLesson**
  Civics and Citizenship concepts and skills

SkillBuilder

Use the SkillBuilder activities to develop these Civics and Citizenship concepts and skills:

- INVESTIGATING CONTEMPORARY CIVICS AND CITIZENSHIP ISSUES
- EVALUATING DEMOCRATIC INSTITUTIONS AND SYSTEMS
- PARTICIPATING IN CIVIC PROCESSES
- COMMUNICATING

LESSON 16.2 Civics and Citizenship concepts and skills

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** and **explain** the Civics and Citizenship skills
- **explain** why the study of Civics and Citizenship is important.

16.2.1 Concepts in Civics and Citizenship

You will develop your Civics and Citizenship knowledge in these key areas.

TABLE 1 The six core concepts that you will learn about in Civics and Citizenship

Concept	Description
Active citizenship	This means that you will learn how to be a responsive and informed participant in civic life for the betterment of your community.
Community	You will learn about **values**, characteristics, rights and responsibilities common to a community's members, and which bring the community together.
Democratic institutions and systems	You will learn about the political, legal and civic institutions and systems which underpin our democratic system in Australia.
Democratic values	Our key democratic values include **popular sovereignty**, consent of the governed, equality, freedom, **pluralism**, protection of minorities and government accountability.
Identity and diversity	This includes learning about a person's sense of who they are, and acknowledging Australia as a culturally diverse, multi-faith and cohesive society.
Legal systems	You will learn about the mechanisms for order, justice and obedience, acceptance of the right to establish courts and make laws, rule of law.

16.2.2 What skills will you build this year?

Investigating contemporary civics and citizenship issues

You will investigate the operation of Australian political and legal systems through asking questions. These questions will form the basis of your research into contemporary Australian society and its capacity to foster fairness, diversity and inclusiveness for different groups such as Aboriginal and Torres Strait Islander Peoples and refugees.

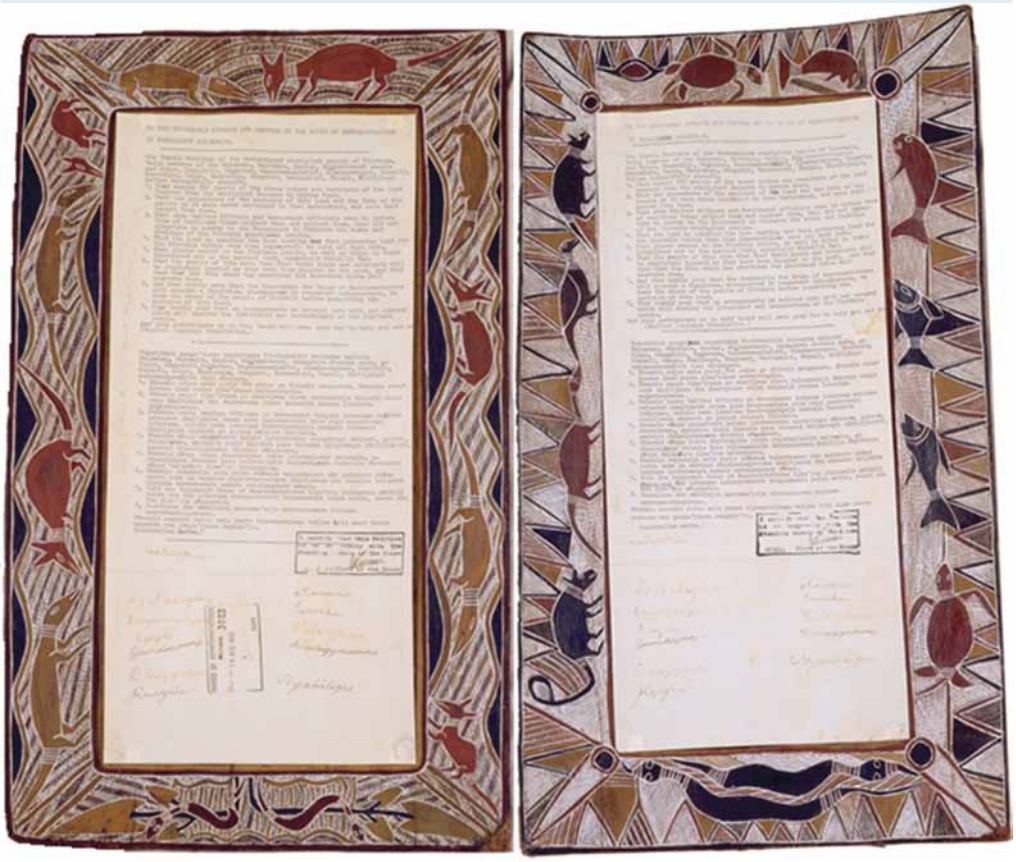
Data will be gathered from multiple sources, such as tables and media reports (print and visual), and different perspectives will be considered and evident in your research. Reliability of sources and the reasons for different perspectives and bias will be considered.

Evaluating democratic institutions and systems

As you research and learn about different things, you will evaluate issues by considering the strengths and weaknesses of differing opinions. Bias and different perspectives will be considered in selecting information used to form opinions. Alternative viewpoints will be acknowledged in your **evaluations**.

You will draw evidence-based conclusions about the capacity of Australia's political and legal institutions to enhance and foster democratic values that are reflective of the cultural, religious and social makeup of Australian society. Using evidence, you will further explain how political opinions are influenced, formed and put into effect within Australia's democratic institutions and evaluate how effectively Australian citizens use their political and legal systems.

FIGURE 1 These petitions were presented to parliament in 1963 by the Yolngu People of Yirrkala, in the Northern Territory, and raised issues relating to their dispossession from their traditional lands.



SkillBuilder discussion

Evaluating democratic institutions and systems

If you were researching the issue of dispossession, what extra information would examining this source give you that an online-only transcript of the documents would not?

Participating in civic processes

Participating in the civic process involves identifying the ways in which active and informed citizens can participate within society. You will be able to explain how our democratic political and legal systems uphold our values and where they might not live up to expectations. Working within democratic processes enables us to make decisions in relation to **contemporary issues** and design an action plan for change in a responsible way.

Communicating

You will present and communicate ideas, perspectives and arguments based on evidence and research on contemporary civics and citizenship issues. Explanations will be clearly expressed, and consider not just the issue but also the outcome of civic action, participation and engagement.

SkillBuilder discussion

Communicating

Discuss and present the factors that might affect an Australian's point of view of this Australian stamp from 1988.

FIGURE 2 An image of one of the Australia Day stamps, part of a series of 21 stamps which followed the voyage of the First Fleet. The series began in May 1987 and was withdrawn at the end of 1988.

16.2.3 SkillBuilders in this topic

The SkillBuilder lessons will link a practical activity to each of the key Civics and Citizenship skills outlined in 16.2.2. The SkillBuilder lesson will tell you about the activity, show you the activity and give you an opportunity to apply the activity.

16.2 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5, 8, 9	6, 7, 10

REMEMBER AND UNDERSTAND

1. What is the fundamental objective of Civics and Citizenship studies?
   - A. To gain knowledge of Australia's governmental structures and judicial systems
   - B. To gain insights into historical phenomena and their impacts
   - C. To enhance proficiency in mathematical disciplines
   - D. To investigate the principles underlying natural sciences
2. How can active citizenship be demonstrated in a community setting?
   - A. Participating in local elections
   - B. Volunteering for community service projects
   - C. Organizing neighborhood events
   - D. All of the above
3. What are the six core concepts in Civics and Citizenship?
   - A. Active citizenship, community, democratic institutions and systems, democratic values, identity and diversity, legal systems
   - B. History, geography, economics, politics, law, sociology
   - C. Voting, representation, legislation, judiciary, executive, media
   - D. Citizenship, governance, justice, equality, freedom, participation
4. How can active citizenship be demonstrated in a school setting?
   - A. Participating in student council elections
   - B. Volunteering for community service projects
   - C. Organising school events
   - D. All of the above
5. What is an example of suitable communication to contact your member of parliament?
   - A. Writing a detailed letter outlining your concerns and suggestions
   - B. Sending an email with specific data and evidence to support your issue
   - C. Making an appointment to discuss your concerns in person
   - D. All of the above

ANALYSE AND APPLY

6. Explain how communication skills can be utilised to advocate for a social cause.
7. Identify ways in which problem-solving skills can be used to address a civic challenge in your local community.
8. Define 'democracy' and explain its importance in modern governance.

EVALUATE AND COMMUNICATE

9. Discuss what 'justice' means in the context of civics and citizenship, and why is it crucial for a fair society?
10. Evaluate how 'participation' contributes to the functioning of a healthy democracy

Answers and sample responses for this topic are available online.

LESSON 16.3 SkillBuilder: Investigating contemporary civics and citizenship issues

online only

Learn how to apply the deconstruct–reconstruct method when using information and/or data from a range of sources. As you break the topic into smaller parts, you will learn how to formulate inquiry questions and use these as the basis for your investigation.

LESSON 16.4 SkillBuilder: Evaluating democratic institutions and systems

online only

When considering democratic institutions and systems, you should be aware of both their positive and negative features so that you can form an opinion and evaluation of them. Structuring your arguments using the TEEL method will help you do this.

LESSON 16.5 SkillBuilder: Participating in civic processes

online only

Participating in civic processes means engaging in activities like voting, volunteering and advocacy to help shape government and community decisions. In this lesson you will design and conduct a survey to gauge opinion on a specific issue.

LESSON 16.6 SkillBuilder: Communicating

online only

In this lesson you will develop your ability to be able to present an explanation or argument in a speech format.

LESSON 16.7 Review

16.7.1 Key knowledge summary

16.2 Civics and Citizenship concepts and skills

- Active citizenship means that people participate in the political and legal systems to influence a change in their society.
- Democracy is a political system in which citizens choose the way in which they are governed.
- Global citizenship involves an understanding of Australia's place and obligations on an international level, and our preparedness to take action to influence change.
- Legal systems in Australia are underpinned by the rule of law. Justice should be fair and equitable.
- Identity and diversity in our multicultural society allow for freedom of expression and help shape our shared beliefs and sense of belonging.

The skills you will develop by studying Civics and Citizenship fall into four main groups:

16.3 Investigating contemporary civics and citizenship issues

- Investigating contemporary civics and citizenship issues entails researching Australian society's fairness, diversity and inclusiveness of various groups.

16.4 Evaluating democratic institutions and systems

- Evaluating democratic institutions involves analysing Australian political institutions' strengths and weaknesses. This means that you will need to access a diverse range of sources to gain enough information and perspective.

16.5 Participating in civic processes

- Participating in civic processes includes identifying ways to engage in democratic decision-making and examining methods of civic participation at different scales. There are many ways to participate at local, state or national level.

16.6 Communicating

- Communicating effectively requires presenting ideas, perspectives and arguments based on evidence and research on contemporary civics and citizenship issues.

16.7.2 Key terms

contemporary issues the diverse range of current events and issues that are facing society
evaluations the process of assessing something to determine its value, effectiveness or impact
national identity the parts of a society that make people feel like they belong, such as shared values or sense of identity
pluralism a system or idea where different groups, beliefs or opinions are accepted and have the right to exist and be heard in society or government
popular sovereignty the idea that the people have the power to choose their leaders and make decisions through voting
values individual beliefs that help to guide our actions

16.7.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview.

Why is it important important to study Civics and Citizenship, and what skills do I need?

1. Now that you have completed this topic, what is your view on the questions? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry questions, outlining your views.

learnon

Post-test	Online post-test
eWorkbook	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary
Video eLesson	Civics and Citizenship concepts and skills

16.7 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 4, 7, 8, 11, 14	2, 3, 9, 10, 12	5, 6, 13, 15

REMEMBER AND UNDERSTAND

1. From the following, identify the most valuable benefit of studying Civics and Citizenship.
   A. Being able to write political speeches
   B. Being able to make informed decisions
   C. Being able to interpret media messages
   D. Being able to remember historical dates
2. Which skill involves understanding different perspectives and using evidence to form judgements about political issues?
   A. Communicating ideas
   B. Analysing political systems
   C. Evaluating democratic institutions and systems
   D. Understanding cultural influences
3. Why is it important to develop critical thinking skills in Civics and Citizenship.
   A. To memorise important laws
   B. To understand political arguments and make informed choices
   C. To gain popularity in political discussions
   D. To choose political leaders based on personal preferences
4. Which Civics and Citizenship skill is most likely to be key to sharing ideas and opinions effectively in debates and discussions?
   A. Communicating
   B. Investigating issues
   C. Organising
   D. Making informed decisions

5. What is the main purpose of researching issues?
   A. To gain new knowledge for writing essays
   B. To develop personal opinions on issues
   C. To gather information and evaluate the pros and cons of different viewpoints
   D. To memorise laws and rules
6. Which of the following is a key reason why Civics and Citizenship education is important?
   A. It teaches how to win elections.
   B. It encourages active participation in society and informed decision-making.
   C. It helps students memorise political figures.
   D. It focuses on learning political theory only.
7. Civics and Citizenship education helps individuals to mostly develop the ability to:
   A. lead political campaigns.
   B. work together to make decisions for the common good.
   C. follow rules without questioning authority.
   D. focus solely on individual interests.
8. Identify the skill developed through the Civics and Citizenship education that helps students understand and analyse government structures.
   A. Investigating contemporary civics and citizenship issues
   B. Evaluating information
   C. Analysing political systems
   D. Communicating ideas
9. Why is it important for citizens to understand their rights and responsibilities in a democracy.
   A. To avoid punishment
   B. To protect their freedoms and contribute to a fair society
   C. To memorise constitutional laws
   D. To gain political power
10. Identify how Civics and Citizenship education contributes to personal development.
   A. It teaches only historical facts.
   B. It helps students become informed and responsible citizens who can contribute to their communities.
   C. It focuses only on memorisation of political figures.
   D. It trains students to follow orders.

ANALYSE AND APPLY

11. **Identify** the four key Civics and Citizenship skills, and **explain** how each one contributes to being an informed citizen.
12. **Explain** why it is important for students to engage in discussions about political and social issues in Civics and Citizenship education.
13. **Explain** how critical thinking skills can help individuals assess the validity of information presented in the media.
14. If you were to research a controversial political issue, **explain** what steps you would take to ensure that your information is reliable and balanced.
15. **Explain** how Civics and Citizenship education influence the way people participate in their local communities or governments? Do you think it should be mandatory in schools? Why or why not?

Answers and sample responses for this topic are available online.

17 Australia's government and democracy

LESSON SEQUENCE

17.1 Overview 498
17.2 How do Australians participate in our democracy? 500
17.3 How do we form a government? 504
17.4 What makes our government system fair? 510
17.5 How is opinion on government shaped? 514
17.6 Inquiry: What is the role of digital media in Australian politics? 518
17.7 Review 520

LESSON 17.1 Overview

INQUIRY QUESTION

How can active and informed citizenship be achieved in Australia, and what role do the media, social media, political parties and government play in shaping our decisions?

In Australia, our citizens participate in a democracy. This includes being able to vote in elections, contact local representatives from the government, join political parties and stand as an independent politician.

We expect our elected representatives in parliament to reflect our values and represent us honestly. This expectation is supported by the separation of powers, which divides the government into three branches, ensuring that no single group has too much control over decision-making. Nevertheless, our voting systems and democratic processes allow us the right to challenge, question and take direct action against issues we may not agree with.

Active and informed citizenship means knowing how to make informed choices when assessing information that is presented to you by different groups and media outlets.

learnon

Pre-test
Online pre-test

eWorkbook
Customisable worksheets for this topic

Video eLesson
Australia's government and democracy

SkillBuilder

Use the SkillBuilder activities to develop these Civics and Citizenship concepts and skills:

- COMMUNICATING
- PARTICIPATING IN CIVIC PROCESSES
- INVESTIGATING CONTEMPORARY CIVICS AND CITIZENSHIP ISSUES

LESSON 17.2 How do Australians participate in our democracy?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the meaning of democracy and how young people can apply democratic values.

Tune in

The right to assemble peacefully includes protests and demonstrations and applies to people meeting privately or publicly.

FIGURE 1 Students protesting in Sydney

1. **Have you ever attended or witnessed a protest, march or other kind of demonstration? What was the issue?**
2. **Look at FIGURE 1. What do you think is the purpose of this demonstration? In your answer, consider both what the people are protesting *against* and what they are protesting *for*.**
3. **Mind-map or list any current issues in society you think that young people should be challenging.**

17.2.1 How to have your say

One of our key rights as Australian citizens is the right to actively take part in **democratic** processes. We can do this in several ways. First, there is our right to vote — a right that can be exercised by all Australian citizens over the age of 18.

SkillBuilder discussion

Evaluating democratic institutions and systems

1. Discuss what you think are the key rights and responsibilities associated with voting in Australia.
2. Mind-map with a partner how the right to vote can contribute to the democratic process in Australia.
3. Explain in what ways voting can impact government policies and decisions at the state, federal and local levels.

FIGURE 2 Voting in Melbourne during the 2022 Australian Federal elections

Then there is our right to freedom of speech, which allows us to express our opinions through a variety of methods. We can write letters to the newspapers, we can phone in to talkback radio, and we can publicise our views on social media using Facebook or X or create our own website or blog. Your ability to openly access websites, emails and social media from various devices promotes the ability to express an opinion on any issue, to anyone, anytime and anywhere. In the same way, you can access the opinions of others or seek information continuously. In addition, there are opinion-polling companies that conduct surveys of ordinary people on all sorts of issues. These results are often published and accessible to the public.

17.2.2 The right to disagree

Not everyone will agree with actions taken by our governments. In a **democracy** — where we all have freedom of conscience, freedom of speech, freedom of association and freedom of assembly — we have the **right** to express that disagreement. When a person (or group of people) expresses that disagreement publicly, it is known as dissent. Expressing dissent is one of the ways in which we can participate in a democratic society under our Australian right. While we are required to obey the law, we are not required to blindly follow whatever the government tells us. Every individual is free to undertake a range of activities in an attempt to have a particular law changed — for example, to organise and participate in a demonstration or public rally, or to sign a **petition** supporting a change in the law. Participation in a rally or protest march allows many people who disagree with particular government policies to express their point of view. Such protests are also aimed at changing those policies and convincing other undecided citizens to support their cause.

17.2.3 Identifying issues of concern

Because the right to **dissent** is a basic democratic right, all young people in Australia are entitled to challenge issues of concern. But how do you identify an issue of concern? Raising political issues may involve challenging a law which you believe is unfair or forces people to act against core values, human rights or basic dignity. It may also involve challenging policies and practices which seem to be embedded in society, reflecting how society's values shift over time. To identify a genuine issue of concern, you should reflect on the policies, practices, laws and norms of society to see if there are any ideas which make you feel uncomfortable, silenced or even oppressed.

Skillbuilder discussion

Investigating contemporary civics and citizenship issues

1. What do you know about the Sea Shepherd Conservation Society?
2. Which issues of concern do they tackle and how do they do it?

FIGURE 3 The Steve Irwin is a previous flagship of the Sea Shepherd Conservation Society used in direct action against whaling and illegal fishing.

17.2.4 Direct action

Most of the time, people are prepared to participate in Australia's democracy by exercising their right to vote at state, federal and local government elections. Circumstances arise at other times when many feel that an issue requires immediate action, or they believe that the government is making the wrong decisions. In these circumstances, people will often take direct action to influence government actions. Direct action usually consists of some form of public demonstration, and can sometimes involve citizens deliberately breaking the law to bring their views to public attention.

CASE STUDY

Student climate strikes

School Strike 4 Climate is a global movement of students who demonstrate and protest against policies that promote fossil fuels and industries which damage the environment. The movement gained traction across the world in 2018, when Greta Thunberg — then a pupil in a Swedish school — staged a protest outside the Swedish parliament building.

A global strike followed on 15 March 2019, which included over a million strikers across 125 countries, including Australia. School Strike 4 Climate (SS4C) operates in Australia and makes the following demands of politicians:

- net zero by 2030, which means no new coal, oil or gas projects, including the Adani mine
- 100 per cent renewable energy generations and exports by 2030
- funding of a transition and job creation for all fossil-fuel workers and their communities.

Is it legal?

When getting involved in direct action, it is important to stay within the law. In media coverage of the climate strikes, a number of politicians claimed that the students were acting illegally. The New South Wales education minister informed a news reporter that, 'You simply can't strike if you don't have a job … the law is very clear, this is a notified school day, kids should be at school.'

However, statements like this were countered by Greta Thunberg and organisations like the Australian Youth Climate Coalition. The right to strike is broadly considered in democratic countries to be protected, protecting the social health and economic interests of workers. Australian Lawyers for Human Rights supported the strikes, recognising the young people's rights to peaceful assembly and freedom of speech.

Is it effective?

On 15 March 2022, federal minister Sussan Ley successfully appealed against a 2021 Federal Court of Australia decision that the minister has a duty of care to young people when assessing fossil fuel developments. As bushfires and floods continue to impact young people's lives in Australia, many young people see it as their responsibility to keep the issue of the climate crisis on the agenda.

SS4C Australia continues to operate with planned strikes, sit-ins and social media events. According to a study from the University of Sydney, 'Students learn through their participation in striking, in contrast to the often-insufficient climate change education taught in schools.' At the time of publication, SS4C is still going strong, empowering young people to take action.

17.2 SkillBuilder activity COMMUNICATING

Effective communication during an expression of dissent promotes critical thinking skills and encourages open dialogue and discussions between individuals. When individuals express dissent, they highlight issues of concern that may not be addressed explicitly by mainstream media or communication platforms. By identifying areas of concern, individuals who demonstrate dissent can influence policy decisions and promote social awareness and participation.

With a partner, choose a topic from the topics offered below, and **construct** a short argument describing:

- a potential concern or issue it can raise
- the overall impact
- a potential solution.

Don't forget to consider your target audience to support effective and relevant communication.

Select from:

- access to free education (funding and curriculum changes)
- access to free healthcare (the funding and management of public health services)
- racial considerations (multiculturalism, Indigenous rights)
- gender considerations (women's rights, workplace equality).

17.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3	2, 5	4, 6

REMEMBER AND UNDERSTAND

1. Complete the following passage by **selecting** the correct words from the options provided. As showing **attitude** / **dissent** / **rebellion** / **obedience** is an essential part of democratic society, it is **reasonable** / **unreasonable** that some groups and individuals would feel the need to voice their opposition to government policies and decisions.
2. a. **Identify** some of the limits or bounds of law.
   b. **Explain** how they could reasonably be placed on dissent in the Australian society.
3. **Explain** what we mean by 'direct action' as a form of political activity.
   A. When the government makes a change based on protests
   B. Taking violent action during a protest
   C. Some form of public protest or demonstration of disapproval regarding an issue or government policy
   D. All of the above

ANALYSE AND APPLY

4. **Examine** how dissent directed towards government policies or actions can have a positive influence on Australian democracy.
5. In both the anti-conscription campaign during the Vietnam War and the Franklin blockade, people broke the law to achieve their aims. Their campaigns were ultimately successful. **Discuss** whether it is appropriate for people to break the law to achieve the changes they want. **Explain** your answer.

EVALUATE AND COMMUNICATE

6. School students in many parts of the world have taken time off school to protest against government inaction on climate change. **Explain** whether such action should take place during school hours, after school or at weekends. **Justify** your answer.

Answers and sample responses for this topic are available online.

LESSON 17.3 How do we form a government?

LEARNING INTENTION

By the end of this lesson you should be able to **outline** the election process including compulsory voting and preferential voting as key features of Australia's democracy.

Tune in

Australian federal elections use a preferential voting system. This means that voters enter their choices in order of preference, with one being the highest. To make every vote count, voters should use each number only once.

1. **Have you ever attended a vote (for example, with a parent or carer)? What did you see there?**
2. **There are many ways to vote incorrectly. Brainstorm ways which you think the voting slip in FIGURE 1 could be made invalid. Hint: Use the instructions on the top of the ballot paper to support your answer.**
3. **Describe how you would complete the voting slip correctly.**

FIGURE 1 An incomplete voting slip

Number the boxes from 1 to 6 in the order of your choice

- [ ] AGATHA, Alloysius
  Blue party
- [ ] BARRY, Beatrice
  Red party
- [ ] CALORMEN, Chris
  Yellow party
- [ ] DAVIDS, David
  Purple party
- [ ] EUGENIDI, Eva
  Orange party
- [ ] FAN, Fai
  Grey party

17.3.1 The electoral system

Our system of government is a democracy. This means it is based on the idea that we elect representatives to make **laws** for us. Because we vote for them, these representatives are expected to

make laws that we agree with. If they do not do that, then we can vote for different representatives at the next election. Voting is compulsory in Australia. Those with the right to vote have the opportunity to elect representatives to:

- the Commonwealth Parliament in Canberra
- the state or territory parliament sitting in each capital city
- local councils in the city, town or shire in which the electors live.

All Australian citizens aged 18 years or over are legally required to enrol to vote. You can enrol any time after your sixteenth birthday, either online or by filling in a paper form. Go to the **Voting enrolment form** weblink in the Resources panel to view the paperwork you need to complete to register to vote.

Preferential voting and proportional representation

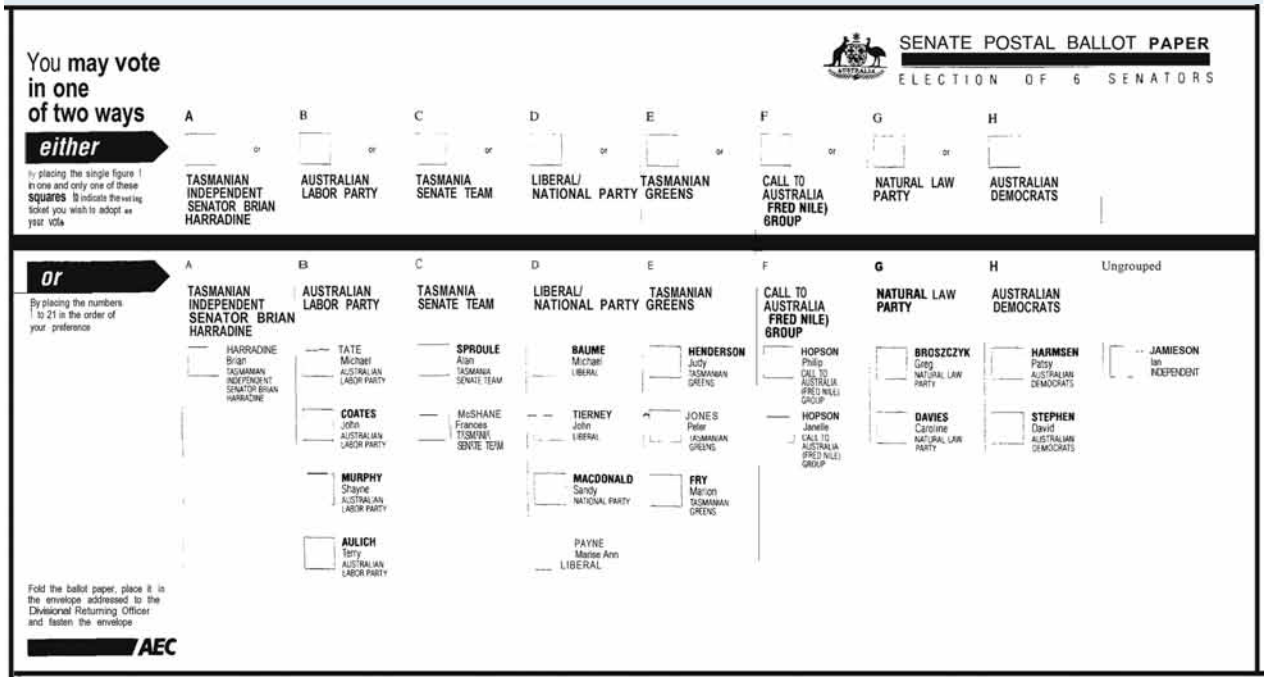
Preferential voting

In preferential voting — like Australian federal elections — voters must nominate candidates in their order of preference from highest to lowest. In full preferential voting, this means numbering every candidate on the voting slip from high to low. In optional preferential voting, voters can instead nominate their main preferences without numbering every candidate.

Proportional representation

Senate elections use proportional representation. Voters may vote 'above the line' or 'below the line'. Voting above the line requires completing at least six boxes in preferential order. Voting below the line requires at least 12 boxes to be numbered. The order of the boxes on the paper is random.

FIGURE 2 An example of a Senate ballot



SkillBuilder discussion

Evaluating democratic institutions and systems

1. What are the two voting options in Senate elections using proportional representation?
2. Work with a partner to describe the difference between full and optional preferential voting in Australian federal elections.
3. At what age must Australian citizens enrol to vote, and how can they do it?

17.3.2 Gaining support

Members of parliament in the local community

Members of parliament sit in the parliamentary chamber, debating legislation and voting to pass or reject it. However, this is only a small part of their work. As representatives of a particular **electorate**, they have an important role in the local community that is represented by that electorate. Often, members of parliament are approached by ordinary citizens requesting them to take some action and work to make improvements in that community.

Federal parliament sits for only about 18 to 20 weeks per year, so many members of parliament can often spend as much as 30 weeks of each year in their local electorates. It is during this time that a member will be engaged in a variety of electorate activities.

FIGURE 3 Members of parliament often perform official opening ceremonies in their electorates.

Helping the community

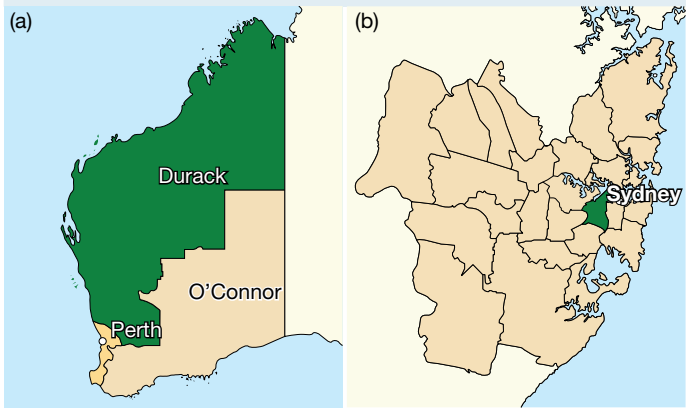
Because each electorate has a similar number of voters, the electorates can vary in geographical size depending on how densely populated they are. This means that an inner-city electorate will be smaller in area than a rural electorate because the population in the country is more thinly spread. For example, the smallest Australian electorate in terms of geographical size is Grayndler, which is in the south-eastern suburbs of Sydney. It has a total area of 32 square kilometres.

The largest in area is Durack, which takes up most of country Western Australia. It covers more than 1.6 million square kilometres. This is approximately 60 per cent of the total area of Western Australia, equivalent to more than 20 per cent of the total landmass of Australia. Its voters are spread out on cattle stations, mining towns and remote First Nations Australian communities. As you can imagine, it is much harder for the member for Durack to maintain contact with the voters than it is for the member for Grayndler. Nevertheless, both members will attempt to perform similar duties in relation to their respective communities.

Every member of parliament maintains an office in their electorate. Members representing very large electorates such as Durack will probably have electorate offices in more than one town. Members are regularly called on to visit schools, sporting clubs and various other community groups. They often have the task of making presentations to individuals and groups, and performing opening ceremonies for new community facilities.

Members also take up issues on behalf of their electorates as a whole. An example would be a local project, such as the

FIGURE 4 The divisions of **(a)** Durack in Western Australia and **(b)** Grayndler in New South Wales



construction of a major road or the provision of some other community facility. The local member will often take up the case with the relevant government minister. Local members also campaign to improve community facilities within their electorates, such as hospitals, community health centres, aged care services and childcare services. Most voters would wish to see their local member actively supporting their community.

Ultimately, it is the voters in each electorate who judge the performance of their local members of parliament at every election. Members need to maintain strong links with their local communities and to publicly support the interests of their electorates if they want to be re-elected.

Helping individual voters

When they are in their electorates, members of parliament spend much of their time helping individual voters. They have a small staff in their electorate offices to help them do this. Voters may have problems dealing with Centrelink or some other government department. Or they may be seeking assistance with immigration or taxation issues, or dealing with problems concerning health or education matters.

The member can intervene personally in the issue and may write to the relevant minister or telephone a contact within the government department concerned. Members of parliament are influential people and usually have lots of contacts, including those in community groups as well as in government departments. If a member personally intervenes on behalf of someone in his or her electorate, this will usually get high priority attention from the government department.

Providing a direct link to parliament

Voters can highlight issues beyond their electorate, prompting government investigation. Farmers have raised concerns about the potential impact of coal seam gas mining on water supplies and farmland. Consequently, inquiries have been initiated by the Commonwealth and state parliaments, leading to new regulations in some states, including Western Australia.

Members of parliament often meet constituents visiting Parliament House in Canberra, organising meetings through their offices. They also engage with school groups, showing them around and teaching them about parliamentary operations at the education centre.

SkillBuilder discussion

Evaluating democratic institutions and systems

1. Mind-map some of the responsibilities members of parliament might have in their electorate offices.
2. Discuss how members of parliament can assist individual voters with government-related issues.
3. Why is it important for members of parliament to be present in their local communities?

FIGURE 5 Members of parliament have electorate offices located within their electorates, often on high streets.

Helping with petitions to the House of Representatives

An important way in which voters can bring an issue to the attention of the parliament is to organise a petition. Members of parliament can provide advice on the preparation of petitions to be presented to the House of Representatives. Members will also make sure the petition goes through the formal processes that are necessary for the petition to be dealt with. The House of Representatives has a Petitions Committee to deal with all petitions that are presented to it. The local member will ensure that the petition is passed on to the Petitions Committee.

17.3.3 How governments are formed and lost

In democratic countries like Australia, governments can be formed and lost in many ways according to the needs, wants and actions of the citizens. There are various factors which impact upon whether a party or coalition of parties have the right to form government.

Parliamentary majority

Parliamentary majority requires a party or coalition (a group of parties) to have the support of over 50 per cent of the members in the House of Representatives. If a government has a majority, it can pass Bills and carry out policies (see topic 20). Because there are 151 seats in the House of Representatives, a parliamentary majority requires 76 seats (half of the total plus one).

The role of the opposition

The official opposition is the party or coalition which has the next highest number of seats. If the government loses the **confidence** of the House of Representatives or the citizens, the opposition would step into the role of government, with its leader as the new prime minister. The shadow ministry, led by the leader of the opposition, is a mirror image of the government ministry. The purpose of the opposition is to carefully examine, criticise and challenge the government in power.

Hung parliament

A hung parliament occurs when no party or group has over 50 per cent of the seats in the House of Representatives. This means that no party can pass laws without getting support from independents. During a hung parliament, the two main parties or coalitions will attempt to convince independents to support them so that they can get the 76 seats needed for a majority.

Minority governments

When a major party does not hold an outright majority, the support of a minor party or independent becomes crucial for passing Bills or motions. This situation allows strong negotiations between a major and a minor party, meaning smaller parties can have a significant impact on legislation and government decisions. An example of this **balance of power** is evident in the Senate (sometimes referred to as the house of review), where minor parties have often played significant roles in shaping policy outcomes.

17.3 SkillBuilder activity PARTICIPATING IN CIVIC PROCESSES

In this activity you will develop a plan of action to raise an issue and make sure that your voice is heard. You will also need to provide a consultation and feedback process to make sure that everyone involved has an opportunity to respond. This activity can be conducted 'for real' or just as planning up to question 5.

Have your say

Working in a group of up to three people, complete the following activities.

1. **Brainstorm** a variety of issues in:
   a. this class
   b. your school
   c. your local community
   d. your national community
   e. the world.
2. Choose *one* issue from your brainstorm to focus on. It does not matter at which level; choose the issue you are most passionate about.
3. **Identify** the stakeholders: Who are the people involved in the issue? Consider both those directly impacted by the issue and those who have some power to resolve or change the issue.
4. **Propose** a way to gather information to ensure a range of voices are heard (i.e. not just your opinion). For example, you could create a survey, petition or website to collect information.
5. **Decide** who you should communicate your information with: who from your list of stakeholders could use this information to act? **Identify** who would benefit from receiving the information.

17.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4, 8	6, 7, 9

REMEMBER AND UNDERSTAND

1. **Define** *electorate*.
2. **State** what is the estimated percentage of people aged between 18 and 24 who have not registered to vote.
   A. 10 per cent
   B. 20 per cent
   C. 25 per cent
   D. 30 per cent
3. **Outline** the role elected representatives play in government.
4. **Explain** two different ways of forming government.

ANALYSE AND APPLY

5. **Identify** the particular right that Australians have that makes this country a democracy.
6. **Explain** why the Senate is elected in a different way from the House of Representatives.
7. Members of the Australian Parliament are paid over $200 000 per year. Some people argue that, as they spend less than half the year in Canberra, and only four days a week in Parliament when they are there, they are overpaid. **State** whether this is a fair assessment of a member's work. Give two reasons to **justify** your opinion.

EVALUATE AND COMMUNICATE

8. **Explain** what is meant by a hung parliament and how it influences the formation of government in Australia.
9. **Explain** the role of the opposition in the Australian parliamentary system and evaluate how it can impact the current government.

Answers and sample responses for this topic are available online.

LESSON 17.4 What makes our government system fair?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the structure of the Australian government and evaluate a balance between decision-making in government.

Tune in

The role key leaders play in the Australian government is determined by the principle of the **separation of powers**. This ensures that no one branch becomes too powerful over the other and protects our system of democracy.

1. **Why do you think it's important to have different branches of government?**
2. **Why do you think it is important for different leaders to work together in government?**
3. **What qualities do you think are essential for a good leader to enforce the principles of democracy during lawmaking?**

FIGURE 1 King Charles III with Prime Minister Anthony Albanese at Government House in 2024

17.4.1 The Australian Constitution

Australia has formally written government principles outlined in one document that establish the rules by which Australia is to be governed. This is known as the **Australian Constitution**. The Constitution establishes the Australian Parliament and describes how Parliament works, as well as the power it holds towards decision-making for Australian citizens. It also outlines the role of the High Court of Australia. Unlike that of the United States of America, the Australian Constitution does not include a bill of rights. However, some human rights, including the right to vote, freedom of religion and trial by jury are mentioned. The Australian Constitution enables Parliament to make laws on topics that affect all Australians. It is important to understand the Constitution to further understand lawmaking to ensure our democratic form of government.

17.4.2 Roles and responsibilities in government

The Australian Constitution is divided into eight chapters. The first three chapters define the independent powers of the three main branches of government:

- The legislature (the area of government that makes and changes laws)
- The executive (the area of government that administers and enforces the law)
- The judiciary (the area of government that interprets and applies the law)

Legislature

The legislature is responsible for making laws. At the federal level, two houses of parliament make up the legislature: the Senate (the upper house) and the House of Representatives (the lower house). There are 76 senators who represent states and territories in the Senate. There are 12 senators from each state and two senators each from the Australian Capital Territory and Northern Territory. There are 151 members of the House of Representatives each representing their relevant electorate within Australia. To become a law, a proposed law must be debated and undergo a number of **readings** and a majority vote by both houses of parliament.

FIGURE 2 Inside the federal **(a)** House of Representatives and **(b)** Senate in Canberra, Australia

Executive

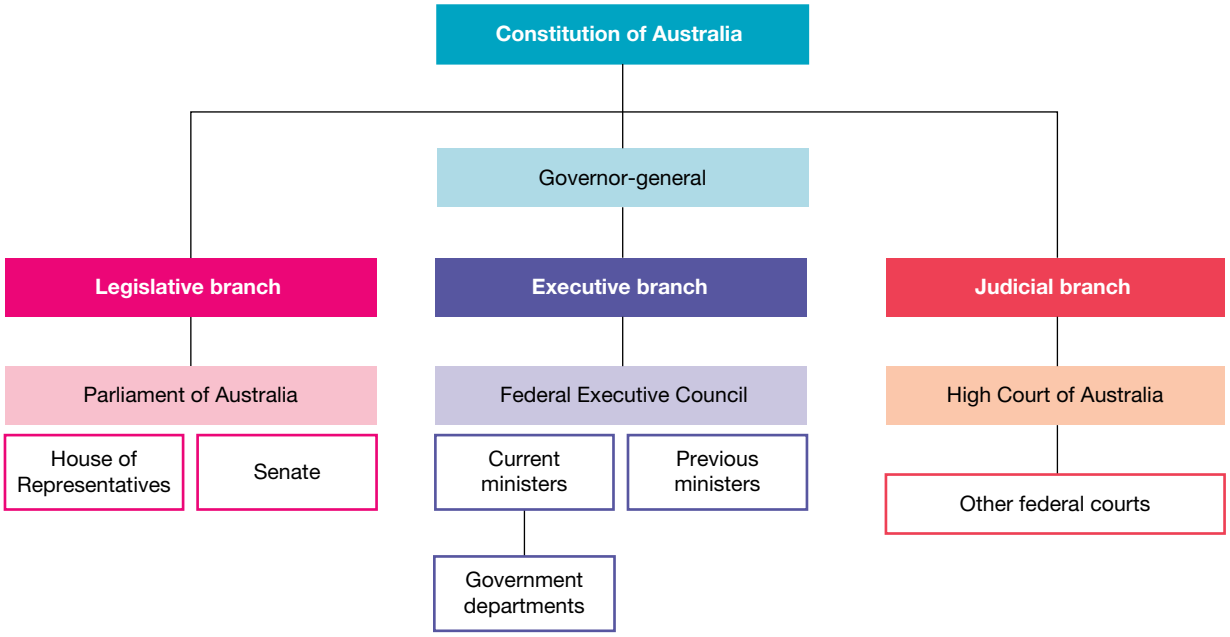
The executive is responsible for approving and enforcing laws. It is made up of the King's representative in Australia, the governor-general, as well as the prime minister, opposition leader and all other ministers. While the governor-general has the official authority to appoint the prime minister and suggest an appropriate time for an election, they typically do so based on the advice given by the prime minister. The prime minister works on selecting the ministers and their supportive role to promote the successful implementation of a relevant law. Government bodies and agencies also support the enforcing of law. These include positions of authority such as the police, tax officers and the human rights commissioner.

Judiciary

The judiciary is responsible for making decisions in applying the law appropriately. On a federal level, it is made up of the High Court of Australia and other federal courts. One of the major functions of the High Court is to interpret the Constitution. The High Court may rule a law to be unconstitutional — that is, beyond the power of the Parliament to make. To interpret legislation, the judiciary looks at the text, context and the legislative purpose through official records of Parliament.

While each branch of government is given the power to function independently, it is important to note that a balance of powers and specific responsibilities ensures that no single branch of government becomes too powerful. An example is evident between the judiciary and the legislature. The High Court can review laws passed by the legislature, ensuring they align with the Constitution and preventing the legislature from overstepping its authority. Another example occurs within the legislature branch. If the House of Representatives passes a Bill (a proposed law), the Senate acts as a house of review and has the power to reject it or propose changes. This ensures both houses of parliament must agree on legislation, preventing one house from having control over the lawmaking process.

FIGURE 3 The structure of government



SkillBuilder discussion

Evaluating democratic institutions and systems

1. **Identify** and **describe** the roles of each branch of government as illustrated in the diagram.
2. **Discuss** how the distribution of responsibilities between the different branches of government, as shown in the diagram, prevents any single branch from becoming too powerful.
3. **Outline** how a proposed law moves through the different branches of government according to the diagram, and **explain** the checks and balances involved in this process.

17.4 SkillBuilder activity INVESTIGATING CONTEMPORARY CIVICS AND CITIZENSHIP ISSUES

The ability to ask questions and undertake research promotes active citizenship, encouraging an effective process in gathering the correct information and forming a constructive argument. Questioning can also support critical thinking.

For each of the tiers below, write your own questions to support your understanding of the structure of government. Hint: Use the task/command words in the second column to help you develop a question.

Question level	Useful starting verbs	Example questions
Comprehension	Identify Outline Describe List	Identify the purpose of the Australian Constitution.
Application	Examine Explain	Explain the role of the judiciary branch.

Analysis	Analyse Compare Distinguish Investigate	Distinguish between the legislature and the executive.
Evaluation	Discuss Evaluate Design Construct Justify Argue	Discuss how the Australian Constitution ensures that no single branch of government becomes too powerful.

17.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 6	4, 5, 8	7, 9, 10

REMEMBER AND UNDERSTAND

1. **Outline** the main purpose of the Australian Constitution.
2. **Identify** the three branches of government outlined in the Constitution:
   A. Executive, administrative, legislature
   B. Legislature, executive, judicial
   C. Judicial, legislature, federal
   D. Executive, legislature, state
3. **Identify** which of the following is *not* a role of the legislature in the Australian government.
   A. Making laws
   B. Amending laws
   C. Enforcing laws
   D. Representing the interests of the Australian public
4. **Describe** the function of the judiciary according to the Constitution.
5. **Explain** the significance of the separation of powers in the Australian government.
6. **Identify** one right mentioned in the Australian Constitution and **explain** its importance.

ANALYSE AND APPLY

7. **Examine** how the principles outlined in the Australian Constitution affect the decision-making process of a newly elected government.
8. **Compare** the roles of the Senate and the House of Representatives in the legislative process. In your answer, refer to strengths and weaknesses in each house representing the interests of Australian citizens.

EVALUATE AND COMMUNICATE

9. **Evaluate** the effectiveness of balancing power in the Australian government. Support your answer with examples from recent political events.
10. **Analyse** the role of the judiciary in interpreting laws and promoting fairness. Research and provide specific examples of judicial decisions that have impacted legislation.

Answers and sample responses for this topic are available online.

LESSON 17.5 How is opinion on government shaped?

LEARNING INTENTION

By the end of this lesson you should be able to **identify** the roles of political parties and elected representatives.

Tune in

During political debates like the 2022 Great Debate (**FIGURE 1**) discussions should be centred on national policy, finance and other important national issues. However, because party leaders are also real people, these debates can sometimes become very heated. It is the role of the chairperson to maintain order in a debate.

1. **If you were chairing a debate between two party leaders, what rules would you put in place?**
2. **What are the advantages to a live, televised political debate?**
3. **What are the disadvantages?**

FIGURE 1 Anthony Albanese and Scott Morrison during the 2022 Great Debate

17.5.1 Political debates

The word 'parliament' actually comes from the French *parler*, meaning to speak. Debate and discussion are a vital part of the democratic process.

Political debates are held between the members of opposing political parties: sometimes the leaders. Debates like the 2022 Great Debate between Scott Morrison and Anthony Albanese are televised and broadcast nationally, where they try to convince the public to listen to their party's message. Other kinds of political debates include the debates in the House of Representatives when a new Bill is proposed.

To 'move a motion' or make a decision in the House of Representatives, the following structure is followed in the debate:

- A member gives notice (if necessary).
- The member moves the motion.
- Another member seconds the motion (if necessary).
- The chair proposes the question.
- Members debate the question.
- (Members may move amendments, which are debated and voted on.)
- The chair puts the question (as amended).
- The House makes its decision.

There are also many rules governing what can be said during the debate. These rules include remaining on topic, not using derogatory or insulting language, and not being 'tedious' or repetitive. It is the job of the chair to enforce order in a debate.

17.5.2 Politics in the media

Traditional media outlets such as radio, television and newspapers offer lots of coverage of important political moments like elections. Because an important part of the democratic process is giving citizens access to politics, it is a good thing that politics get media coverage. However, it is important to note that the media is often *biased*, meaning that the opinions are not neutral.

Public attention towards media coverage of politics changes over time. In recent years, the level of engagement in politics has started to increase, but the focus is shifting from traditional media to other media outlets such as blogs and social media.

17.5.3 Politics and social media

The rise of social media has had two main impacts on citizens' electoral decisions. Firstly, the speed of communication has increased. This means that political 'gossip', damaging reports about politicians, interviews and other news stories can be published and spread very quickly.

The second change is the rise of 'fake news'. Because of the rapid nature of social media and internet, it is difficult to stop stories from spreading even if they are false.

FIGURE 2 below shows a recent survey of voter trust in various outlets. As you can see, scientific bodies like CSIRO are very well trusted, but digital news platforms are not trusted by the public.

FIGURE 2 A survey of voter trust in various outlets

How much trust do you have in the information you receive from the following institutions?

	Government	Digital platforms (e.g. Facebook)	Traditional news and media	Scientific bodies (e.g. CSIRO)	Business groups and peak bodies
Have a lot of trust	12%	3%	7%	30%	5%
Have some trust	31%	16%	32%	37%	27%
Have little trust	33%	33%	36%	20%	42%
Have no trust at all	18%	42%	18%	6%	16%
Unsure	6%	6%	6%	7%	10%
Have a lot of trust + have some trust	43%	19%	40%	67%	32%
Have a little trust + have no trust	51%	75%	54%	26%	26%

SkillBuilder discussion

Investigating contemporary civics and citizenship issues

1. **Suggest** why the rise of social media has impacted the speed of political communication and the spread of 'fake news'.
2. **Explain** how opinion polls are conducted, and what kind of information polling companies seek from respondents.
3. **Discuss** the different strategies that governments and political parties use to influence voters' decisions.

17.5.4 Opinion polls

Opinion polls are mostly conducted by phoning people and asking them a series of questions. While conducting their surveys, polling companies often ask the people being surveyed their age and level of income to include a large range of people. Businesses can hire different polling companies to conduct surveys to find out whether a particular advertising campaign has been effective. Businesses can also conduct surveys on people's attitudes to government policies and actions. To achieve this, they will survey people to find out whether they support or oppose a proposed law or other government action. When an election is close, they will also conduct surveys to find out who people intend to vote for.

17.5.5 Paying for your vote

There are many ways in which governments and political parties can attempt to influence voters' decisions. These include:

- paid advertising on billboards, in traditional media and online
- using political consulting firms and public relations experts to tell members the 'right' things to say to their audience
- paying for focus and interest groups who may have a biased opinion
- launching political campaigns which may include all of the above and target audiences for a set period of time, usually in the run-up to an election.

17.5 SkillBuilder activity INVESTIGATING CONTEMPORARY CIVICS AND CITIZENSHIP ISSUES

1. Look at the images below. Based on what you see, **explain** what is the issue being discussed.

2. The image on the left was taken from an article referring to the dissemination of 'fake news' in the Taiwanese media. The fake news was designed to disrupt the election of a politician in favour of same-sex marriage. **Discuss** whether you have encountered fake news online. **Explain** where, and what made you believe it was fake.
3. Social media has an important role to play in modern politics. **Identify** the steps that you can take to evaluate a source of information and ensure its credibility.

17.5 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 6, 8	7, 9, 10

REMEMBER AND UNDERSTAND

1. Which of the following steps is *not* part of the debate process when passing a motion in the House of Representatives?
   A. The member moves the motion.
   B. The Chair proposes the question.
   C. Members debate the question.
   D. The party leaders hold a televised debate.
2. **Determine** whether the following statement in True or False.
   The public trusts the government more than social media as a source of information.
3. **Determine** which of the following are methods of 'paying for votes' that political parties may use during an election.
   A. Paid advertising on billboards, in traditional media and online
   B. Using political consulting firms and public relations experts to tell members the 'right' things to say to their audience
   C. Paying for focus and interest groups who may have a biased opinion
   D. All of the above
4. In your own words, **explain** one reason for the Great Debate between the leaders of the government and opposition.
5. **Compare** the different trust levels in the chart in **FIGURE 2**. **Explain** which is the most trusted source and why that is the case.

ANALYSE AND APPLY

6. **Consider** the kinds of advertising you see on social media. **Identify** some of the products or services you see, and **propose** why you have been targeted with these adverts.
7. **Discuss** the reliability of opinion polls in reflecting the views of a population. **Identify** factors that contribute to their reliability.
8. **Identify** some of the risks of advertising on social media.
9. Study the data in **FIGURE 2**. Over time, attention has shifted away from traditional media outlets and towards 'new media' like the internet, blogs and social media. What trends can you **identify** in the figure? Write a short paragraph **explaining** your answer with reference to the figure.

EVALUATE AND COMMUNICATE

10. Imagine you wanted to present a petition to parliament. **Identify** and **explain** three things that you might need to do if you wanted to increase the chances of that petition being successful.

Answers and sample responses for this topic are available online.

LESSON 17.6 Inquiry: What is the role of digital media in Australian politics?

LEARNING INTENTION

By the end of this lesson you should be able to **analyse** the role of digital media in Australian politics.

In this inquiry you will investigate the role of digital media, including websites and social media, in Australian politics. Refer to **FIGURES 1** and **2** or find two of your own.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

FIGURE 1 The main page of the Australian Labor Party website in the lead-up to the 2025 election.

FIGURE 2 The main page of the Liberal Party of Australia website in the lead-up to the 2025 election.

Inquiry steps

Discuss the following:

a. What information about the two parties can you gain from **analysing** the main pages of their websites?
b. What would you change about the websites?

Step 1: Questioning and researching

Write your **inquiry question**. What do you already know about Australian politics and the media? What would you like to know about the role of digital media in politics?

Research your question. Use the **Liberal Party** and **ALP** weblinks in the Resources panel to support your research.

Step 2: Analysis, evaluation and interpretation

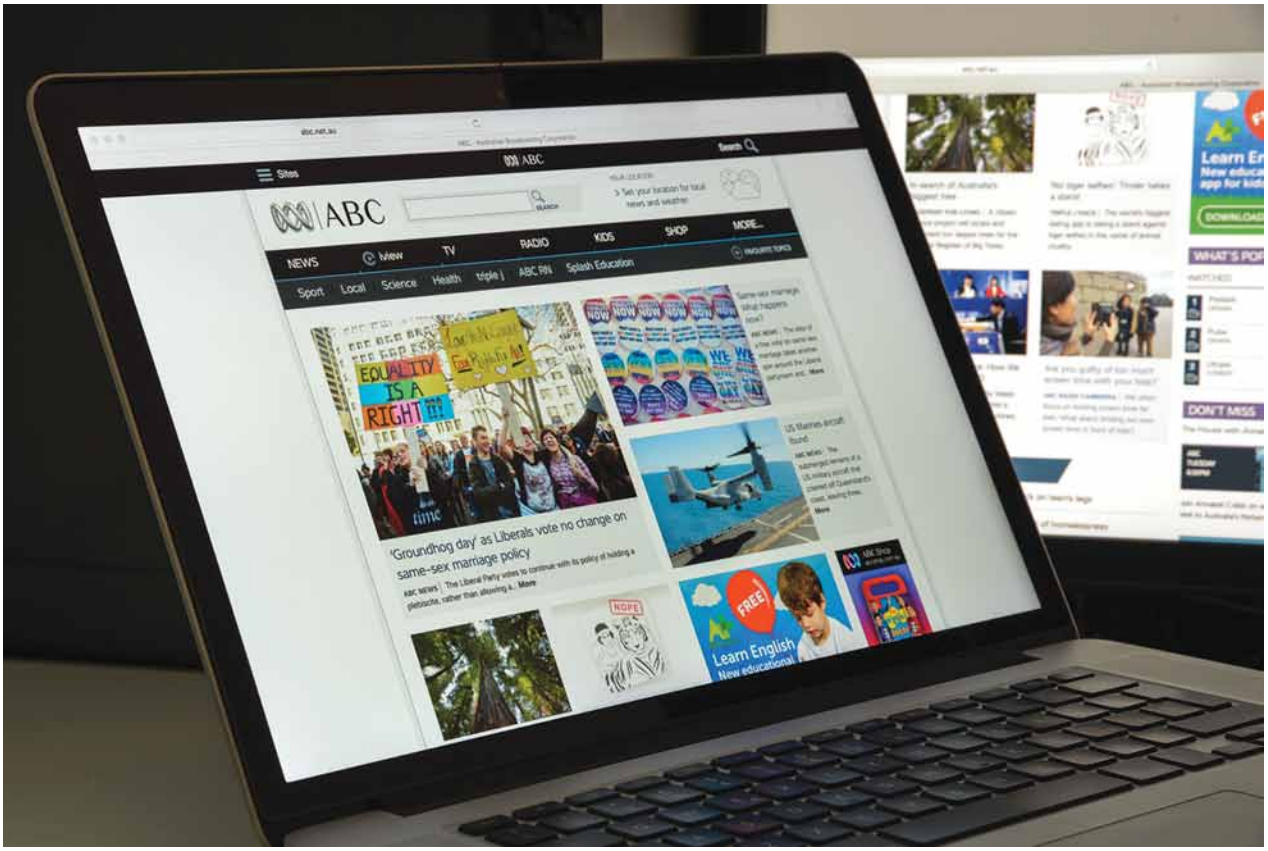
Analyse the messages and emotional appeal of these two political parties by interpreting the construction of their media materials, including advertising, websites and other materials. Use the provided model of a poster analysis to guide you.

Step 3: Civic participation and decision-making

Compare the similarities and differences between the two websites using a dot point comparison table, or a Venn diagram. What is the same? What is different? Most importantly: *Why are there differences?*

Step 4: Communicating

Communicate: *What is the answer to your inquiry question?* Present your findings in a format of your choosing. Support your answer with examples from your research, analysis and evaluation. You could also design your own social media page or website for a fictional party of your design to demonstrate your understanding.



LESSON 17.7 Review

17.7.1 Key knowledge summary

Use this dot-point summary to review the content covered in this topic.

17.2 How do Australians participate in our democracy?

- In a democracy, citizens have the right to disagree with those in power.
- There are many lawful ways to express dissent, including protests.
- Protests and petitions can have an impact, such as leading to laws being changed.

17.3 How do we form a government?

- All citizens over the age of 18 have the right to vote in Australian elections, although they need to register to take full advantage of this right.
- Preferential voting means that voters nominate candidates in the order they prefer from highest to lowest.
- Local members are voted in to help their constituents.
- A parliamentary majority requires that a party or group holds over 50 per cent of the seats in the House of Representatives.

17.4 What makes our government system fair?

- The Australian Constitution establishes the separation of powers into the legislative, executive and judicial branches, ensuring a system of checks and balanced power to support democracy.
- The legislative branch creates laws that represent the interests of Australian citizens.
- The executive branch, led by the prime minister, enforces these laws and ensures they are applied fairly.
- The judicial branch interprets these laws, providing a mechanism for citizens to challenge government actions.

17.5 How is opinion on government shaped?

- The Great Debate between the leaders of the government and the opposition is a televised event, often occuring just before election time.
- Debates are held in the House of Representatives when moving a motion.
- Opinion polls, media coverage and paid advertising all play significant roles in influencing how individuals perceive political issues and candidates.

17.6 Inquiry: What is the role of digital media in Australian politics?

- Digital media plays a role in influencing how people vote.
- Political parties use their websites and social media to present a certain message.

17.7.2 Key terms

Australian Constitution the foundational legal document that establishes the framework for the governing of Australia
balance of power the distribution of authority and responsibilities among the three branches of government
confidence the level of support that the government has from the parliament, which is necessary for the government to remain in power
democracy a form of government in which the people determine how they will be governed
democratic supporting democracy, or the system of government where supreme power is vested in the people and exercised directly by them or by their elected representatives under a free electoral system
dissent disagreeing with a decision, opinion, or set of beliefs, and expressing this disagreement
electorate an area of Australia that elects one member to parliament

laws the system of rules that Australia recognises as regulating the actions of its citizens, which it may enforce by the imposition of penalties and sanctions
petition a formal request for change signed by many people
reading the formal presentation of a proposed law (Bill) to members of parliament
right an entitlement to be treated in a particular way. A legal right is a right that can be enforced by law
separation of powers the dividing of responsibilities and powers of government

17.7.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview:

How can active and informed citizenship be achieved in Australia, and what role do the media, social media, political parties and government play in shaping our decisions?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

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Post-test	Online post-test
eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary

17.7 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 4, 10, 11, 12	2, 3, 7, 13, 14	5, 6, 8, 9, 15, 16

REMEMBER AND UNDERSTAND

1. What is meant by democracy?
   A. Any form of government where laws protect the freedom of speech
   B. Any form of government with rights protected by a constitution
   C. Any form of government in which the people determine how they will be governed
   D. Any form of government with two houses of parliament
2. From the following, select a lawful form of dissent.
   A. Protest
   B. Writing a threatening letter
   C. Overthrowing a government by force
   D. A verbal threat or accusation
3. What might a protest might achieve?
   A. A change in laws
   B. A new law being passed
   C. Raising public awareness
   D. All of the above

4. Identify how old you must be to vote in Australia.
   A. 20
   B. 17
   C. 18
   D. 21
5. Outline the meaning of preferential voting.
   A. Voters vote in preference from lowest to highest.
   B. Voters number their votes from 1 to 10.
   C. Voters vote in order of preference from highest to lowest.
   D. Voters do not need to number their votes.
6. Identify how many votes must be numbered 'below the line' on a Senate voting slip.
   A. Fewer than 12
   B. 12
   C. More than 12
   D. At least 12
7. What is the role of the opposition?
   A. To create diversity
   B. To argue with the government
   C. To carefully examine, criticise and challenge the government in power
   D. To generate conflict
8. Identify how many seats a majority government must hold.
   A. Over 50 per cent
   B. Fewer than 50 per cent
   C. 80 per cent
   D. 25 per cent
9. How do the three branches of government promote check and balance?
   A. Each branch works on its own.
   B. One branch controls the other.
   C. Each branch can check the powers of others.
   D. All branches have the same role.
10. Identify who participates in the leaders' Great Debate.
   A. The opposition leader
   B. The leader of the government
   C. The leaders of the government and the opposition
   D. All of the leaders from the House of Representatives

ANALYSE AND APPLY

11. **Identify** when it might be reasonable for a government to restrict a protest gathering.
12. Briefly **explain** how each state and territory is represented in the Senate.
13. **Explain** how local members of parliament can assist individuals and community groups.
14. **Explain** the term 'parliamentary majority'.

EVALUATE AND COMMUNICATE

15. **Explain** the significance behind the three main branches of government.
16. **Suggest** what the purpose is of holding the Great Debate between the leaders of the government and opposition.

Answers and sample responses for this topic are available online.

18 Laws and citizens

LESSON SEQUENCE

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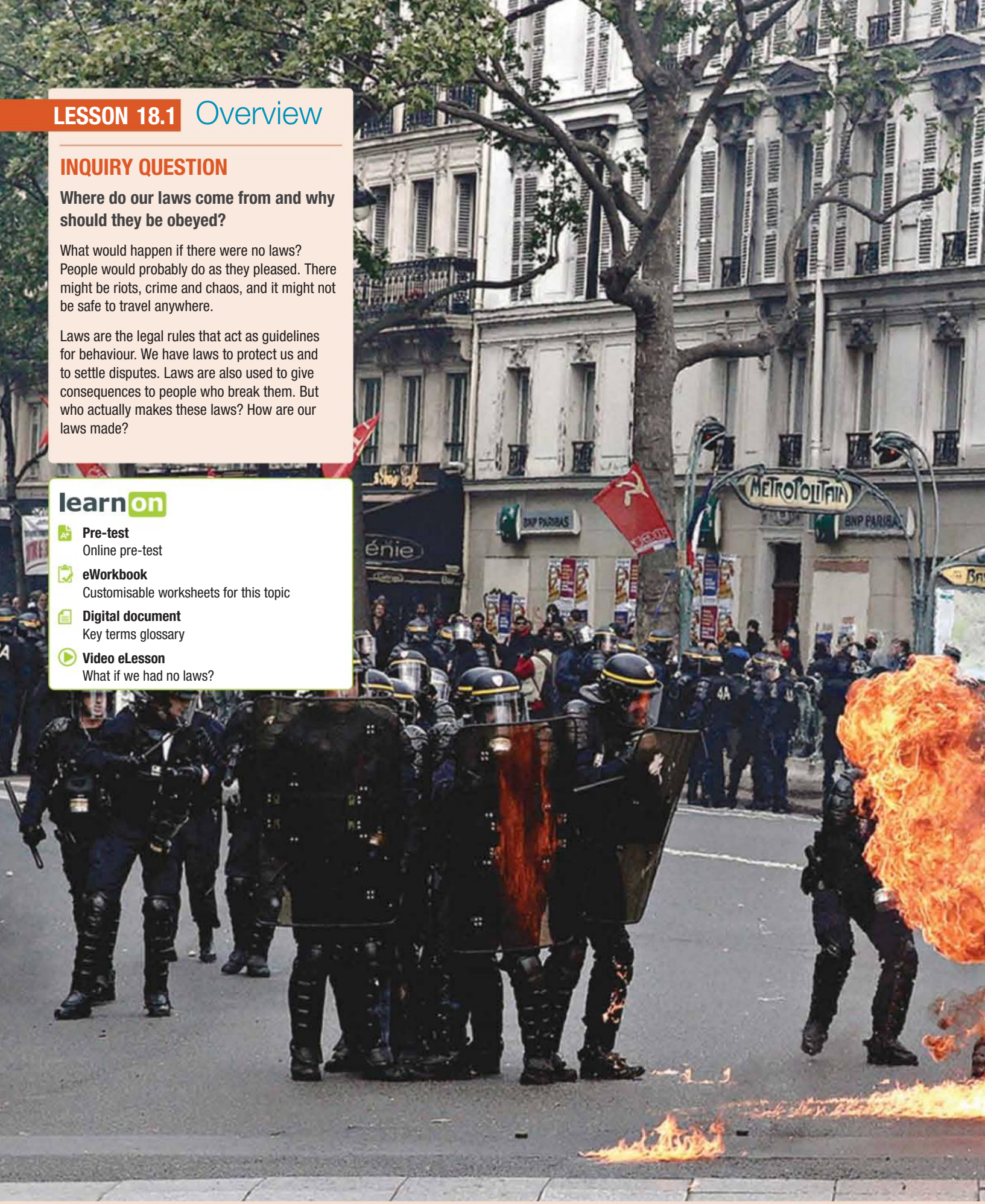


LESSON 18.1 Overview

INQUIRY QUESTION

Where do our laws come from and why should they be obeyed?

What would happen if there were no laws? People would probably do as they pleased. There might be riots, crime and chaos, and it might not be safe to travel anywhere.

Laws are the legal rules that act as guidelines for behaviour. We have laws to protect us and to settle disputes. Laws are also used to give consequences to people who break them. But who actually makes these laws? How are our laws made?

learnon

- **Pre-test**
  Online pre-test
- **eWorkbook**
  Customisable worksheets for this topic
- **Digital document**
  Key terms glossary
- **Video eLesson**
  What if we had no laws?

SkillBuilder

Use our SkillBuilder activities to get instant feedback on the Civics and Citizenship concepts and skills of:

- **INVESTIGATING CONTEMPORARY CIVICS AND CITIZENSHIP ISSUES**
- **EVALUATING DEMOCRATIC INSTITUTIONS AND SYSTEMS**
- **PARTICIPATING IN CIVIC PROCESSES**
- **COMMUNICATING**

LESSON 18.2 Why do we need laws?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **explain** the difference between legal and non-legal rules
- **explain** the characteristics of laws.

Tune in

It seems that in cartoons, ignorance of the law is an excuse. In the real world, however, this is not the case — you can be held accountable, even if you were not aware that a law exists.

FIGURE 1 Plankton is a tiny, cunning villain from SpongeBob SquarePants, always scheming to steal the Krabby Patty secret formula.

1. **Make a list of five laws of which you are aware.**
2. **How do you know they are laws?**
3. **Identify one way that the law has had an influence on your life today.**

18.2.1 Legal and non-legal rules

Our lives are governed by a wide range of rules and laws, which provide us with guidelines for how we should behave. However, not all rules are laws.

Non-legal rules

Non-legal rules are made by different groups within society, such as your parents, school or a sporting group. These rules are enforced by the group that made them and do not apply to the whole community. For example, your school may have rules related to wearing a uniform and the process to follow if you are out of uniform. The uniform rules and the consequences for non-compliance will be different in different schools.

Legal rules

Legal rules apply to everyone in the community. They are made by lawmaking bodies and enforced by the courts. For instance, people who drive cars are expected to obey the posted speed limits and stop at a red light.

Under the **rule of law**, any person caught disobeying the law will be punished. People who break the road laws might receive a fine. In 2021, Deputy Prime Minister Barnaby Joyce was fined $200 for not wearing a face mask indoors, in a breach of New South Wales COVID-19 regulations. Members of the Victorian Parliament were issued with similar fines.

18.2.2 What are the characteristics of effective laws?

Laws are not the same everywhere. They help regulate the behaviour of people within society, allowing it to function and flourish. Effective laws share five characteristics (see **FIGURE 2**).

SkillBuilder discussion

Investigating contemporary civics and citizenship issues

1. **Identify** a law that you think is effective.
2. **Explain** why you think your chosen law is effective — refer to the characteristics of an effective law.
3. **State** the punishment for breaking this law.

FIGURE 2 To be effective, laws should have the following characteristics.

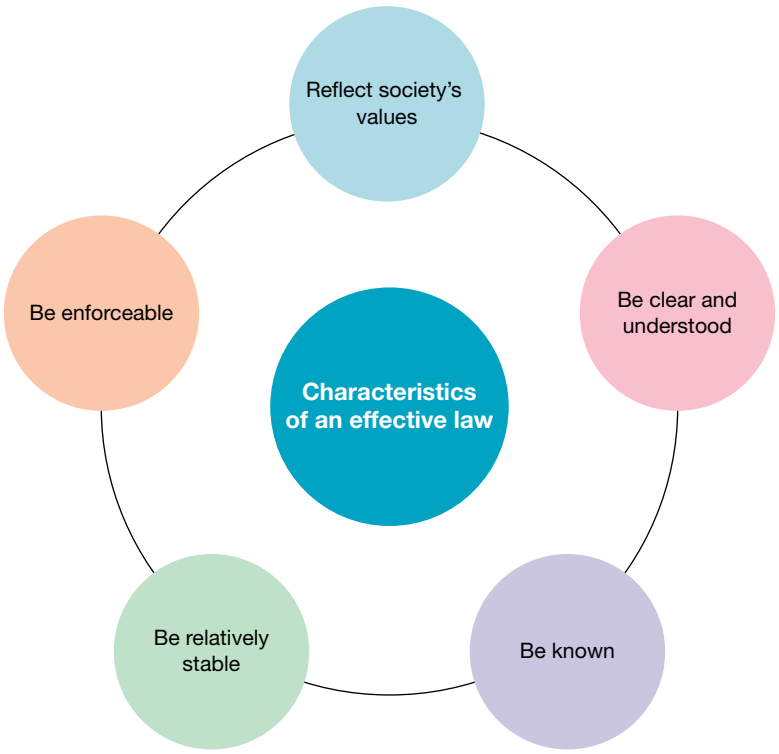
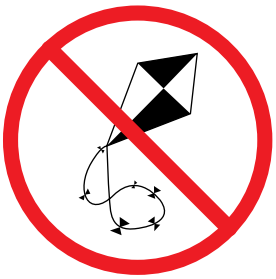


TABLE 1 Characteristics and examples of effective laws

Criteria	Description	Examples
Reflect society's values	People are more likely to follow laws that reflect the values of their society.	• Designated smoking areas and smoking bans reflect changing values in relation to the harmful health effects of smoking.
Be clear and understood 	The law must be written in a way that makes it easy for people to understand.	• In Victoria it is illegal to harness a goat or dog to a vehicle and drive it through a public place. • People will have different ideas about the meaning of public place.
Be known	People cannot obey the law if they do not know about it. However, ignorance of the law is not an excuse. Individuals are expected to know the laws that are relevant to them.	• Advertising campaigns for mask-wearing and vaccination • 40 km/h school zones, mobile phone bans
Be relatively stable	If laws were constantly changing people would have difficulty understanding and keeping up with changes.	• Laws typically do not change often and the government uses the media to conduct education campaigns.
Be enforceable	Effective laws can be enforced. This does not mean that all breaches will be detected and offenders punished. It means that it is possible to catch those who break the law.	• Modern technology such as speed cameras make traffic offences easier to detect. • On the other hand, anti-piracy laws are more difficult to enforce as new methods of using the internet for illegal downloads are developed.

Did you know?

In Victoria, it is illegal to fly a kite in a public place to the annoyance of another person. The word 'annoyance' will mean different things to different people.

SkillBuilder discussion

Communicating

1. Read the 'Did you know?' box. Do you think this law is widely known? Why/why not?
2. Is this law enforceable? Explain.
3. Suggest a change to this law that might make it more effective.

18.2 SkillBuilder activity COMMUNICATING

Australia, like many countries, has some unusual laws. An internet search for 'weird and wonderful laws in Australia' will give you some more information. Remember to chose a stable site such as the ABC or Parliamentary Education Office.

1. Working with a partner, **select** one weird law that appeals to you both.
2. **Investigate** your chosen law and make notes on the following:
   a. Explain what is this law is about.
   b. Suggest why it was made.
   c. In your opinion, state whether we need this law. **Justify** your point of view.
3. **Identify** the characteristics of an effective law.
   a. Explain which characteristics are met.
   b. Explain which characteristics are not met.
4. **Create** an infomercial to make people aware of this law.
5. Play your infomercial to the class.

18.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5, 6, 9	7, 8, 10

REMEMBER AND UNDERSTAND

1. You have just joined a local basketball team and will play competition matches on a Saturday afternoon. The coach has said that you need to attend training or your court time during matches will be restricted.

   This is an example of a **legal** / **non-legal** rule.
2. After a car accident, the drivers must exchange registration details.

   This is an example of a **legal** / **non-legal** rule.
3. **Identify** which of the following is a characteristic of an effective law.
   A. Is stable
   B. Rule of law
   C. Is changeable
   D. Legal rules

4. A new law has been passed that makes it illegal to wear clothing with raised studs. Bill is not sure whether the decorative collar he bought for his dog is permitted.

   Identify which of the characteristics of an effective law this fails to meet.
   A. The law is stable.
   B. The law is enforceable.
   C. The law is clear and understood.
   D. The law applies to everyone.
5. Imagine that a new law came into effect that required all renewable energy sources to be banned.
   Identify which of the characteristics of an effective law this law seems to disregard.
   A. Is a ble to be enforced
   B. Reflects community values
   C. Rule of law
   D. Is clear and understood

ANALYSE AND APPLY

6. Using examples, **explain** the difference between a legal and a non-legal rule.
7. To be effective, laws must be enforceable. Does this mean that every person who breaks the law will be caught and punished? **Justify** your answer.
8. **Explain** what is meant by the phrase 'ignorance of the law is no excuse'.
9. **Explain** what is meant by 'rule of law'.

EVALUATE AND COMMUNICATE

10. Imagine that a government advertising campaign has informed the public that a new law banning people from smoking in their own home will come into effect in three weeks.
    With reference to at least one of the characteristics of an effective law, **evaluate** why this new law might not be effective.

Answers and sample responses for this topic are available online.

LESSON 18.3 How do parliaments make laws?

LEARNING INTENTION

By the end of this lesson you should be able to:
- **explain** how parliament makes laws
- **distinguish** between a bill and an Act of Parliament
- **explain** the term *royal assent*.

Tune in

There are laws related to the protection of Australia's environment. They can be found in the *Environmental Protection and Biodiversity and Conservation Act 1999*.

1. **Working with a partner, propose three reasons why we might need laws related to the protection of the environment.**
2. **Brainstorm reasons why laws might need to change.**
3. **Hypothesise: what might parliament do to change this law?**

FIGURE 1 Australia's wildlife is protected under specific laws.

18.3.1 The lawmaking process

A parliament consists of the lawmakers at the state and federal levels of government. Most laws in Australia are made by our federal and state parliaments. These laws are called **statute laws**. Most Australian parliaments have a lower house and an upper house. Parliaments make laws by passing a **bill** through both houses.

Sometimes the ideas for new laws come from the people within parliament or from government departments. Parliament also engages formal law reform bodies to investigate an area of law and make suggestions on how a law can be improved.

Parliament can become aware of the need for change because of the actions of people within society.

A law made by parliament is called **legislation**, a statute or an **Act**. Before any proposed law can become an Act of Parliament, it has to be debated and passed by both houses of parliament and then approved by the **Crown**. During the debate in parliament, the government explains why the law is needed and why it will be good for Australia. The **opposition** may try to argue why this is not the case. Let us see, step by step, how all of this might happen in federal parliament (**FIGURE 2**).

18.3.2 Executive law

When parliament passes legislation, many clauses are general, lacking application details. The law delegates power to the relevant minister to create detailed rules and regulations for emerging situations. This is known as executive or delegated law. The minister also makes appointments to government roles, like ambassadors.

These regulations need approval from the governor-general or state governor, and are called Governor-General in Council Regulations or Governor in Council Regulations. They must be tabled in parliament and can be revoked by a parliamentary majority vote. Ministers remain accountable to parliament and, by extension, to voters.

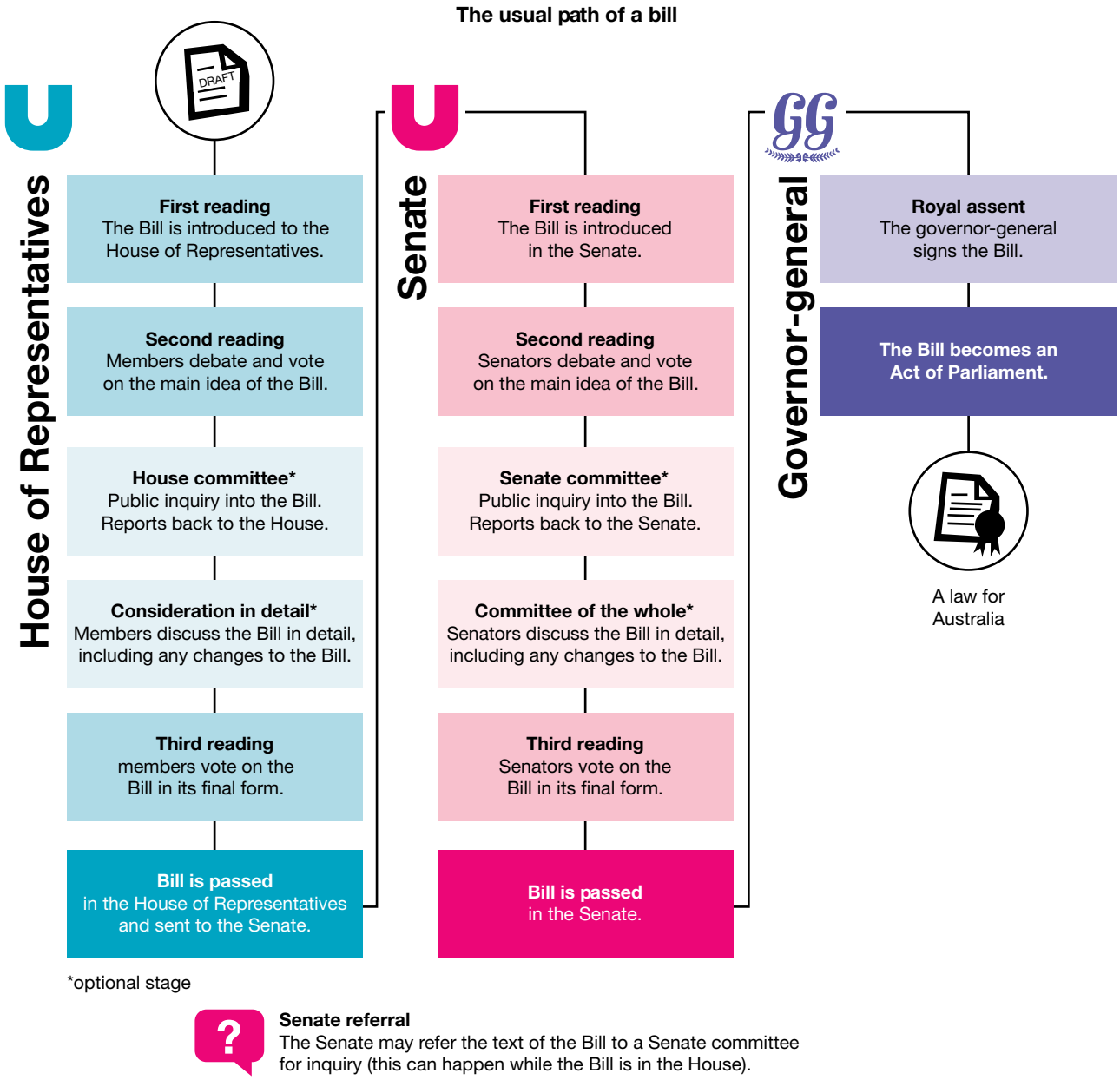
18.3.3 Secondary legislation

Parliament is our main lawmaking body; however, it does not have the time or resources to make all the laws needed in society. As a result, state and Commonwealth parliaments delegate their lawmaking power to other bodies, known as subordinate authorities. Parliament will pass a parent or enabling Act that allows these bodies to make by-laws or regulations within their area of expertise. Some examples are:

- Local councils make local laws about pet ownership, parking and rubbish removal.
- VicRoads is a statutory body that makes laws about roads, driving licences, road safety initiatives and traffic. Similar bodies exist in other states.
- Government departments, such as the Department of Education, oversee the provision of education services within each state and territory.

Regulation and by-law made as a result of delegation of lawmaking power is checked by a parliamentary committee to ensure that it is within the scope of the enabling Act and consistent with other legislation. Any person who believes that any law is unjust can challenge the law in the courts.

FIGURE 2 How laws are made in federal parliament



SkillBuilder discussion

Evaluating democratic institutions and systems

1. Where do ideas for laws come from?
2. Why do you think most Australian parliaments have two houses?
3. Why might a proposed law be changed when it is being debated in parliament?

18.3 SkillBuilder activity EVALUATING DEMOCRATIC INSTITUTIONS AND SYSTEMS

Working in pairs, visit the Commonwealth Parliament website to investigate a new law that is going through parliament now.

a. Briefly **describe** the law you have found and explain what stage it has reached.
b. **Describe** what will happen next in the stage of the process of your bill passing through parliament.
c. **Consider** whether this proposed law will be changed much on its way through parliament. **Justify** your opinion.
d. Share your findings with another pair of students.

18.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4, 6, 8	7, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** the correct definition of statute laws.
   A. Laws that are made by local government
   B. Laws that are made by the judiciary
   C. Laws that are made by state and federal parliaments
   D. Rules that are made at school
2. **Select** from the following words to complete the sentence below.
   petition bill slip
   Act of Parliament Act of law Act of government
   A _____ is a proposed law and an _____ is the final version of the law.
3. **Royal approval** / **governor-general assent** / **royal assent** / **double majority** is approval by the ruling monarch of Australia or their representative of a proposed bill.
4. **Explain** what is meant by the term *executive law*.
5. **Identify** the person who is normally responsible for the development of executive laws.
   A. Parliament
   B. The relevant government minister
   C. The prime minister
   D. The governor-general

ANALYSE AND APPLY

6. Use a flow chart to **explain** how a law is made in parliament. Draw your flow chart using eight boxes joined by arrows. Number each box from step 1 to 8. In each box **describe** what happens to the proposed law in that step, using no more than ten words. For example: Step 1 — government (in Cabinet) discusses the idea of a new law.
7. a. **Describe** how a piece of executive law could be overruled.
   b. **Explain** what this suggests about the power of parliament compared to the powers of the executive.

EVALUATE AND COMMUNICATE

8. In your view, **explain** whether the process of lawmaking in Australia is fair. In your answer **consider** whether the people have enough opportunity to have their say when new laws are being made. **Justify** your answer.
9. Since 1981, no party has had a majority in the Senate, except for three years from 2005 to 2008. This means that a government may have to negotiate with non-government senators to pass legislation. **Identify** one advantage and one disadvantage of this process.
10. Queensland, the Northern Territory and the Australian Capital Territory only have one house of parliament, rather than an upper and a lower house. This means there is no upper house review of legislation. **Explain** whether this is a good or a bad thing. **Justify** your point of view.

Answers and sample responses for this topic are available online.

LESSON 18.4 How do courts make laws?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** how the courts make laws
- **define** the term *precedent* and how it applies to lawmaking.

Tune in

Did you know? Courts often must decide the meaning of words in statutes when deciding cases.

The Victorian *Control of Weapons Act 1990* makes it an offence to carry a regulated weapon without a lawful reason.

Items that could be classed as a regulated weapon without someone realising it include everyday objects that, under certain regulations, are considered dangerous. For example, a hockey stick can be classed as a dangerous weapon if it is used to harm someone.

You be the judge:

1. **Create a list of items that you think could be classed as weapons.**
2. **Do you think someone should be convicted of the offence 'carrying a regulated weapon without a lawful excuse' if they have a hockey stick off the pitch? Justify your answer.**
3. **Suggest one reason a person might need to have a weapon.**

FIGURE 1 A game of hockey, played with a hockey stick

18.4.1 Common law

The main role of courts is to settle disputes, but courts also make laws. They do this as they interpret existing laws and make decisions to resolve the cases they are hearing. This type of law is known as case law, judge-made law or **common law**.

Common law originated in England as judges travelled from village to village making decisions based on tradition, custom and **precedent**. The judges began to apply a law that was common to all people across the country, rather than using the customary law of each region. Common law is applied today when cases come to court and there is no legislation regulating that case. The judge needs to make a decision about the law on this type of matter. This process is illustrated in the following case study, Finders keepers.

The law relating to who has the right to own things that are found has changed over the years as judges have made new decisions. The judges in the following cases made decisions that became part of the common law because there was no existing law about possession that specifically applied to the cases.

CASE STUDY

Money found buried on private property

In 1964, a woman sold her New South Wales house to a couple. The couple hired a building company to work on the house. While digging, one of the owners of the building business found a tin with £8500 inside.

- The original owner claimed that she had buried the tin and therefore the money belonged to her.
- The couple who had bought the house claimed that the money was theirs because it was found on their land.
- The owner of the building business claimed the money belonged to him because he had found it.

FIGURE 2 Who owns the contents of the box?

SkillBuilder discussion

Participating in civic processes

1. Work with a partner to decide how long you think the box has been buried.
2. Discuss why there is a dispute over the ownership of the box.
3. You be the judge: who will you give the box to? Give a reason for your decision.

No laws covered this dispute, so the judge hearing the case was required to make a decision that would create a new law. The judge decided that the couple who now owned the house were allowed to keep the money because they owned the land.

CASE STUDY

Gold found by the side of the road

In 1965, a Queensland police officer was walking to the place where he was going to direct traffic leaving a drive-in theatre. On the side of the road, on land belonging to the theatre, he found a gold ingot. The owner of the gold could not be found.

- The owner of the land claimed ownership.
- The police officer claimed ownership because he had found the ingot.
- The police officer's employer (the state) claimed ownership because the officer worked for the state.

The judge hearing the case decided that the land was regularly accessed by the public and that the police officer could keep the gold ingot because his job was to direct traffic, not to find lost things. Any other member of the public might have found the ingot, and the fact that the officer was on duty was just a coincidence.

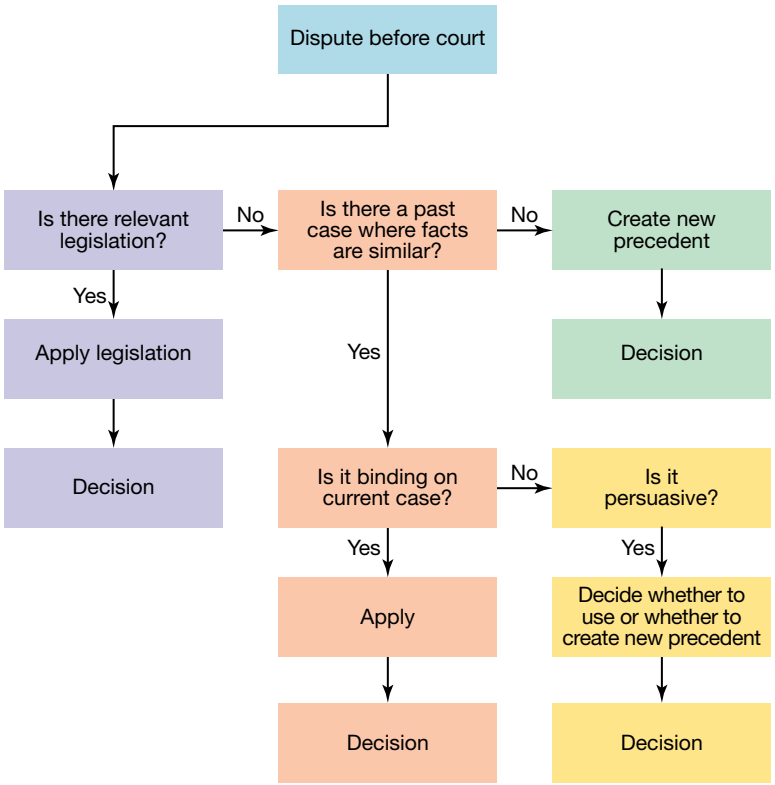
FIGURE 3 Does a gold ingot found on someone's property belong to the property owner or to the person who found it?

18.4.2 Precedent

Common law is developed through the legal principle of precedent. If your sister was given a car for her 18th birthday, you might expect your parents to do the same for you because your parents have set a precedent. Courts use the same idea. When a judge makes a decision in a court case, this decision will be recorded in a law report. Other judges hearing cases with similar facts will refer to these decisions. As judges follow precedents set in earlier cases, the law is applied consistently and fairly. Additionally, it might be possible to predict the outcome of a case. This process, which is used by courts to interpret statutes and create precedents, is shown in **FIGURE 4**.

Precedent works because of our court hierarchy.

FIGURE 4 The decision-making process for settling disputes in court

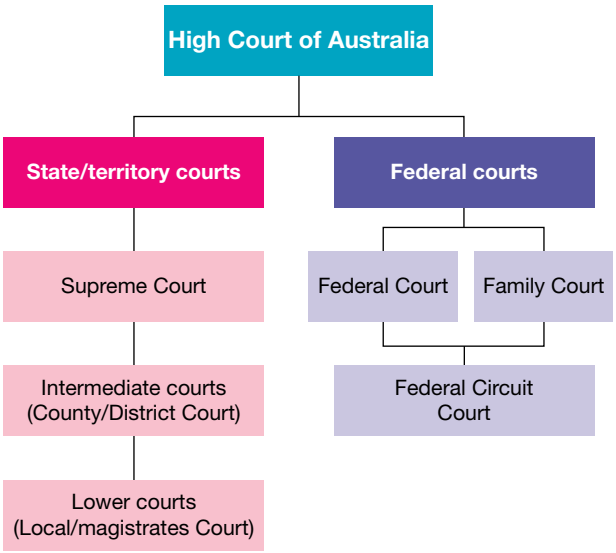


18.4.3 Australia's court hierarchy

Australia's court system is made up of many different courts, which are arranged in levels in order of importance (a hierarchy). The higher courts in the hierarchy hear the most serious matters; less serious cases are heard in the lower courts.

At the bottom of the court hierarchy is the Magistrates Court (called the Local Court in New South Wales, the Magistrates Court in Victoria and elsewhere). These courts hear more than 90 per cent of the cases that go to court, and they have a large number of courthouses. There is probably one in your local area. The District Court (called the County Court in Victoria) exists in most states and sits only in the main cities. There is only one Supreme Court in the capital city of each state, and only one High Court in Australia (in Canberra).

FIGURE 5 The Australian court system



When superior courts (such as the High Court and each state's Supreme Court) settle disputes, they can create new legal principles that must be followed by the lower courts in their own hierarchy. This is referred to as a **binding precedent**. Judges in each state have to follow only those decisions made in the higher courts in their state, and those made in the High Court. For example, a decision made by a judge in the Supreme Court of Western Australia does not have to be followed by judges in the District Court of New South Wales. However, the New South Wales judges could use the decision as a **persuasive precedent**.

18.4 SkillBuilder activity INVESTIGATING CONTEMPORARY CIVICS AND CITIZENSHIP ISSUES

1. Using the internet or newspapers, find an article that reports on a new principle of law that has been made through a landmark court case.
2. **Investigate** how this case proceeded through the courts.
3. Write a brief report on how this case established a new legal principle.
   If you are having difficulty finding a case, try one of these:
   - *Commonwealth v Tasmania* (Tasmanian Dams case)
   - *Eddie Mabo & Ors v The State of Queensland* (Mabo case)
   - *Dietrich v the Queen* (Dietrich's case)
   - *Plaintiff M701/2011 v Minister for Immigration and Citizenship* (Malaysian solution case)
   - *Love v the Commonwealth of Australia*
   - *Thoms v the Commonwealth of Australia*
   - *Vanderstock & Anor v State of Victoria*

18.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 7	4, 5, 6	8, 9

REMEMBER AND UNDERSTAND

1. **Identify** the statement that best explains *common law*.
   A. Laws that are made by state and federal parliaments
   B. Laws that are made by the courts
   C. Laws that are made by local government
   D. Rules that are made at school
2. **Identify** the statement that best describes *precedent*.
   A. Laws that are made by local government
   B. A previous court decision that has a high degree of similarity to a case that is currently before the court
   C. Any decision that is heard in the Supreme Court
   D. Any decision that is made in the Magistrates Court
3. **Identify** three statements that are relevant to the case studies under the heading of Finders keepers.
   A. All cases concern lost items (of significant value).
   B. All cases have items that were never claimed.
   C. All cases involve common law.
   D. All cases involve ownership disputes.
4. **List** the courts in your state's court hierarchy, from highest to lowest.
5. **Explain** where and how common law first developed.

ANALYSE AND APPLY

6. **Summarise** how the judges in the case study Finders keepers made changes to the law.
7. **Identify** two things that could happen if a judge decided to ignore a precedent and make a completely new decision.
   A. The judge could be fined.
   B. A new precedent could be set.
   C. The decision would be overruled.
   D. An appeal to a higher court may be made.
   E. An appeal to a lower court may be made.

EVALUATE AND COMMUNICATE

8. Many people argue that judges should not make law because they are not democratically elected, unlike members of parliament. **Identify** and **explain** one positive and one negative effect of judges making law through precedent.
9. The doctrine of precedent states that judges must apply a precedent established in a higher court in the same court hierarchy, but occasionally judges apply a precedent from a court in a different state or different country. **Explain** when and why this might occur.

Answers and sample responses for this topic are available online.

LESSON 18.5 What is the relationship between parliament and courts in lawmaking?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the relationship between parliament and the courts in lawmaking.

Tune in

Brainstorm a list of ways in which parliament and courts might work together.

FIGURE 1 Neither the parliament nor the courts could operate effectively without the other.

18.5.1 How do parliament and the courts work together?

There are three sources of law in Australia:

- statute law, made by parliament
- secondary legislation, made by bodies to whom parliament has delegated lawmaking power
  - statutory authorities
  - government departments
  - local councils
- common law, made by the courts.

Some of our laws are made by the federal government and others by state governments. It is important that all our lawmaking bodies work cooperatively.

The relationship (**FIGURE 2**) between parliament and the courts is sometimes complex and the two bodies need to work together to ensure that the legal system operates effectively. Parliament makes the laws, creates the courts and sets their jurisdiction. The courts, on the other hand, need to apply these laws to the cases that come before them and make sure the laws are enforceable and just.

As parliament was elected to make laws, it is the supreme lawmaking body. This means it has more power in lawmaking than courts.

SkillBuilder discussion

Evaluating democratic institutions and systems

1. Which lawmaking body (parliament or courts) do you think is more important? Give reasons for your answer.
2. Why do parliament and the courts need to work together?
3. How do you think courts can influence parliament to change the law?

FIGURE 2 There are four parts to the relationship between parliament and the courts.

18.5.2 Statutory interpretation

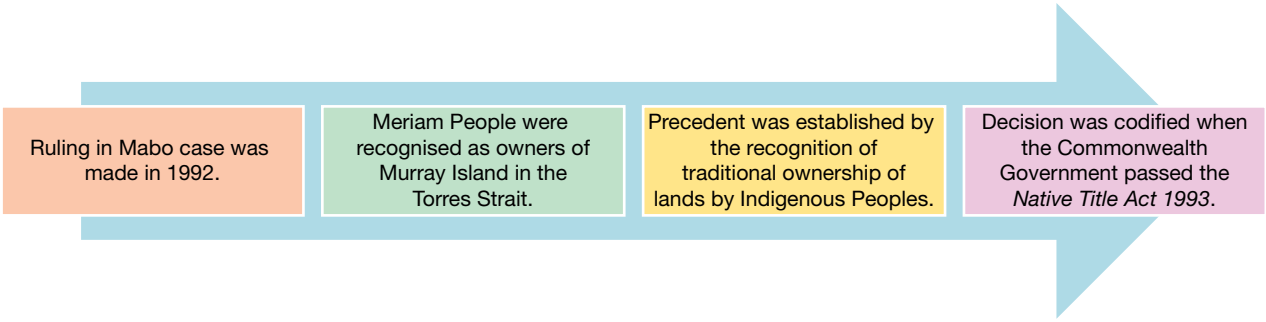
Laws made by parliament (see lesson 18.3) are often written in general terms, so that they can apply to a variety of different situations. This means that the intention of parliament may not be clear when a court is trying to apply the statute to a case that has come before it. This process, where the judge must decide the meaning of the words in an Act of Parliament, is referred to as **statutory interpretation**.

Refer to **FIGURE 1** in lesson 18.4. A judge might have to determine whether a person with a hockey stick in their car is guilty of having a regulated weapon. If the person is a hockey player, this might be considered a lawful excuse.

18.5.3 Codification of common law

The law can become fragmented when courts are creating precedents. Parliament can bring together all the laws on a single topic into one Act of Parliament. This sometimes occurs when the courts have created a precedent, and parliament wants to combine this law with laws found in statutes, or clarify the law for future cases (see **FIGURE 3**).

FIGURE 3 The decision in the Mabo case was 'codified' when the government passed the *Native Title Act 1993*.



18.5.4 Abrogation of common law

Courts cannot ask parliament for advice when they are interpreting statutes and on occasions may make decisions that do not reflect the way parliament intended the law to operate, or that the parliament does not agree with. Nor can courts seek input from the community when deciding cases, and may make decisions that do not reflect the values of society. Parliament may become aware that a ruling made by courts needs to be changed as it is outdated or does not reflect the views of the people. As parliament is the supreme lawmaking body, it can **abrogate**, and change laws made by the courts.

18.5.5 Courts influencing parliament to change the law

In 2002, parliament repealed an old law known as the widow's discount. Under this old common law, compensation payable to a women whose husband died in a work-related accident was determined by the women's age, appearance and prospects of remarrying. Following public outcry, parliament abrogated this discriminatory law.

The court's role in lawmaking is secondary to its role in hearing cases and settling disputes. This means that judges are sometimes reluctant to change the law and think that the law should be changed by parliament. In Trigwell's case (**FIGURE 4**), the court followed an old legal principle; however, as part of the decision, the judge's opinion was that parliament needed to change the law.

SkillBuilder discussion

Evaluating democratic institutions and systems

1. Why do you think the court ruled the landowner was not responsible for the harm caused by the sheep?
2. Do you think the judge should have reached a different conclusion? Why?
3. How have the courts influenced a change in the law?

FIGURE 4 Trigwell's case, a landmark ruling in Australian tort law, revolved around escaped sheep causing an accident on the highway. The court, in keeping to an old common law principle, determined the landowner was not liable for the damages, prompting the judge to urge parliament to modernise the outdated law.

18.5 SkillBuilder activity EVALUATING DEMOCRATIC INSTITUTIONS

You have looked at parliament and the courts as lawmakers.

1. **Create** a table that **illustrates** why the courts are involved in lawmaking.

Reasons for courts being involved in lawmaking	Reasons courts should not be involved in lawmaking

2. **Create** a table that **evaluates** the ability of parliament to be the sole lawmaker.

Reasons that parliament should be the sole lawmaker	Reasons why courts cannot be the sole lawmaker

3. Use the information in your tables to present your point of view on the following question.

   Members of parliament are elected by the people to make laws; judges are not. **Explain** whether judges should be allowed to make laws. **Justify** your opinion.

18.5 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 3, 4	1, 5, 6, 7	8, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** the word or phrase **defined** by the following statement:

   The process where judges decide the meaning of words or phrases in an Act of Parliament
   A. Abrogation
   B. Statutory interpretation
   C. Codification
   D. Precedent
2. **Identify** which of the following is not an aspect of the relationship between parliament and the courts in lawmaking.
   A. Abrogation
   B. Statutory interpretation
   C. Precedent
   D. Codification
3. **Identify** the word or phrase defined by the following statement:

   Parliament collects all the laws on a single topic, including those made in the courts, and brings them together in a single statute.
   A. Precedent
   B. Abrogation
   C. Statutory interpretation
   D. Codification
4. Rewrite the incorrect statements to make them true.
   a. Parliament was created by the courts.
   b. The federal government is solely responsible for making laws in Australia.
   c. Courts can seek input from the community when deciding cases in Australia.
5. **Define** *abrogation*.

ANALYSE AND APPLY

6. Following an inquest into drownings in backyard swimming pools, the coroner's court recommended that laws be introduced to make pool fences compulsory. Parliament has since passed laws setting minimum standards for fences around pools.

   Explain why this is an example of the courts alerting parliament of the need for a change in the law.

EVALUATE AND COMMUNICATE

7. **Explain** why judges become involved in lawmaking.
8. When the people do not agree with the decision of a court, they may pressure the government to change the law. Parliament may respond to this pressure by changing the law.

   Identify the aspect of the relationship between parliament and the courts that this represents.
   Justify your answer.
9. **Summarise** why the Mabo case is an example of codification.
10. Using an example, **elaborate** on how the courts can alert parliament to the need for a change in the law.

Answers and sample responses for this topic are available online.

LESSON 18.6 What is the difference between civil and criminal law?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **explain** what makes a crime within criminal law
- **explain** the difference between a summary and indictable offence
- **explain** how civil law encompasses other areas of law.

Tune in

1. **Draw a table such as the one below.**
   a. **In the first column, mind-map a list of everything you know about criminal law.**
   b. **In the second column, mind-map a list of everything you know about civil law.**
   c. **Which list is longer?**

Criminal law	Civil law

2. **How do you think criminal and civil law might be involved in the car accident shown in FIGURE 1?**

FIGURE 1 Did you know that a car accident can involve both criminal and civil law?

18.6.1 Criminal and civil law

There are two main types of law in Australia:

- criminal law, which protects us and punishes offenders
- civil law, which protects our rights and property.

Criminal law is made and enforced by parliament and the courts. Everybody must follow the same criminal laws. Civil law, on the other hand, enables individuals and groups to pursue their rights if they have been infringed by other individuals and groups.

18.6.2 Criminal law

Criminal law protects innocent individuals from wrongdoers. It outlines the way people should act — what they can and cannot do. Some of the most common crimes are robbery, **homicide** (**manslaughter** and murder), rape, assault, theft and drug offences.

If a person commits a crime, this is treated very differently from other legal issues. For example, if you rob a bank, it does not remain a **dispute** between the bank and yourself. Your action is regarded as an offence against the state. The state gives the police the power to catch offenders and prosecute them through the courts. It is up to the prosecution to take legal action against an accused person in order to establish the guilt of the accused, based on evidence, because the prosecution has the **burden of proof**. This means that the prosecution must prove that the accused is guilty of the crime. It is not up to the accused person to prove their innocence. This is referred to as the **presumption of innocence**.

During the court case, you, as the accused, will have the opportunity to tell your side of the story. If you are found guilty, you will be punished. Possible punishments include a fine, imprisonment, community service, good behaviour bonds, loss of a driving licence or a combination of these punishments (see **FIGURE 2**).

Indictable offences

Serious crimes, such as homicide, child abuse and rape, are called **indictable offences**. These offences are heard in higher courts, such as the District or County Court, or the Supreme Court. The guilt of the **accused** is determined by a **jury**.

Summary offences

Less serious crimes, such as minor assaults, petty theft and traffic infringements, are called **summary offences**. These are dealt with relatively quickly and cheaply by a **magistrate** in a Magistrates Court.

In the car accident shown in **FIGURE 1**, the state would take action if the driver who caused the accident had broken the road laws, by speeding, failing to give way or having a blood alcohol content of over 0.05 per cent.

SkillBuilder discussion

Evaluating democratic institutions and systems

1. Why is a crime considered an offence against the state?
2. What is the difference between a summary and an indictable offence?
3. What is meant by the term *beyond reasonable doubt*?

FIGURE 2 A criminal act is treated as an offence against the state, which deploys the police and courts to apprehend, prosecute and imprison the person who has done wrong.

Burden and standard of proof

In a criminal case, the jury (or magistrate) must be satisfied that the accused is guilty '**beyond reasonable doubt**'. This means that, based on the evidence, the only logical conclusion is that the accused is guilty. This is known as the **standard of proof**. The prosecution has the burden of proof. If a magistrate or jury is not convinced beyond reasonable doubt of the accused's guilt, the accused should be given the benefit of the doubt and found not guilty.

18.6.3 Civil law

Civil law deals with non-criminal matters. It allows people to bring actions against other people for a civil wrong done to them. Civil law involves such matters as disputes between friends, business partners, consumers and retailers, neighbours, or an individual and a government department. Examples of civil wrongs include **negligence**, **trespass**, **defamation**, **nuisance** and **breach of contract**. Where a civil wrong is successfully proven in court, the wronged party, referred to as the **plaintiff**, will usually seek damages (money) as compensation. In such a case, the **defendant** will be found to have been **liable**.

For example, consider the landmark court case of *Donoghue v. Stevenson* from 1932. In this case, Mrs Donoghue discovered a decomposed snail at the bottom of a ginger beer bottle after she had consumed some of its contents.

This caused her to suffer serious stomach illness. She decided to sue the manufacturer, Mr Stevenson, for negligence, arguing that he did not take sufficient care to ensure the product was safe for consumption.

Mrs Donoghue, as the plaintiff, went to court to prove her case (see **FIGURE 3**). She sought an order from the judge for the manufacturer, the defendant, to pay her compensation for the harm caused. The plaintiff does not always win such cases; sometimes the judge decides that the plaintiff's rights were not breached and can order them to pay the defendant's legal costs. Civil law can be required to address a wide range of unusual circumstances.

SkillBuilder discussion

Evaluating democratic institutions and systems

1. Why is the situation shown in **FIGURE 3** an example of civil law?
2. What is the standard of proof in a civil case?
3. Why do you think the standard of proof is different between criminal and civil cases?

FIGURE 3 A civil wrong is treated as a private matter between the disputing parties. If the defendant is found liable, the judge may order them to compensate the plaintiff or rectify the harm caused.

There is a lower standard of proof in civil cases. The plaintiff has to show that the defendant was 'more likely than not' to have committed the breach. This is known as the '**balance of probabilities**'.

In the car accident shown in **FIGURE 1**, the driver who caused the accident can be sued for medical expenses related to injuries suffered by others and the damage caused to property.

18.6 SkillBuilder activity COMMUNICATING

You may use digital or print media for this task — read all the instructions before you begin.

1. In pairs, find three newspaper articles describing civil law cases and three describing criminal law cases. Make sure your articles relate to Australian law and are not more than 12 months old.
2. Cut out (or print) the heading for each article and paste them on a large sheet of paper (leave room for annotations). Record the newspaper the article is from and the date of the article. **Classify** each article as relating to criminal or civil law and provide evidence from each article to support your decision.
3. Write a paragraph to **summarise** (present the main points) each article under each heading.
4. **Identify** the laws that apply to each article.

18.6 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 7, 8	6, 9, 10

REMEMBER AND UNDERSTAND

1. Fill in the gaps in the following sentence to **define** criminal and civil law.

   _____ protects our rights and property while _____ protects people and punishes offenders.
2. **Classify** the following as either a crime or a civil wrong.
   - A. Negligence
   - B. Robbery
   - C. Drug offences
   - D. Trespass
   - E. Arson
   - F. Breach of contract
   - G. Homicide
   - H. Trespass
   - I. Defamation
3. **Determine** whether the following statement is True or False.
   Summary offences can only be dealt with by the Supreme Court.
4. **State** the difference between:
   - a. the plaintiff and the defendant
   - b. indictable offences and summary offences
   - c. burden of proof and standard of proof.
5. **Explain** the differences between civil law and criminal law.

ANALYSE AND APPLY

6. Consider **FIGURE 3** in section 18.6.3.
   - a. **Explain** why is this case is a civil matter.
   - b. **Identify** the plaintiff and what they are seeking in the action.
   - c. **Identify** the standard of proof required in this case.
   - d. **Explain** the outcome of this case.
7. **Identify** whether the following cases involve criminal law, civil law or both.
   - a. You are held up at knifepoint and your purse or wallet is stolen.
   - b. A woman slips on a wet supermarket floor and breaks an ankle.
   - c. A man is convicted of driving with a blood alcohol content of 0.08 per cent.
   - d. You find maggots in a tuna sandwich you just bought from a cafe.
   - e. A neighbour's loud music at 3 am is disturbing you.

EVALUATE AND COMMUNICATE

8. **Demonstrate** your understanding of how a case can include both criminal and civil elements.

   Create your own scenario for a case that might involve both criminal and civil law. **Identify** the part of your scenario that is civil and the part of your scenario that is criminal.
9. In a civil case, the victim can sue for compensation, but in criminal cases, the wrongdoer is punished and the victim is frequently not compensated for harm done to them. Limited victim compensation is available in some cases but not in every case.

   It has been suggested that the law should be changed to provide compensation in every criminal case. **Explain** one advantage of this change and **predict** a possible disadvantage of this change.
10. Criminal cases are dealt with by the courts because the state prosecutes the wrongdoer. Only around 20 per cent of civil cases come before the courts because they are resolved out of court by negotiation between the parties, or because one party does not have the money to fight the case. This can mean that the wealthiest or most powerful party wins.

    Propose a reform to the law that could help resolve this situation.

Answers and sample responses for this topic are available online.

LESSON 18.7 What is customary law in Aboriginal and Torres Strait Islander Peoples' communities?

Aboriginal and Torres Strait Islander readers are advised that this topic may contain photos of, or references to, people who have died.

LEARNING INTENTION

By the end of this lesson you should be able to:

- **describe** some of the ways in which customary laws are significant to Aboriginal and Torres Strait Islander cultures
- **outline** examples of how customary law is practised within the legal system today.

Tune in

Aboriginal and Torres Strait Islander Peoples recognise 'payback' as an element of customary law. Traditional punishments include spearing and singeing a person.

Though the man in **FIGURE 1** is just giving a demonstration, imagine that he is about to deliver 'payback'.

1. **As a class, discuss what you think happens during a spearing.**
2. **Brainstorm ideas about what is meant by *spearing* and *singeing* a person.**
3. **Discuss whether you think this sounds like a suitable way to deliver justice.**

FIGURE 1 Spearing is a possible punishment within customary law.

18.7.1 What is customary law?

Customary law refers to the guidelines for behaviour that have been developed by Aboriginal and Torres Strait Islander Peoples. These laws are passed on by word of mouth and have not been written down. In what way is customary law significant to Aboriginal and Torres Strait Islander Peoples? We will explore the answer to this question throughout the rest of this lesson.

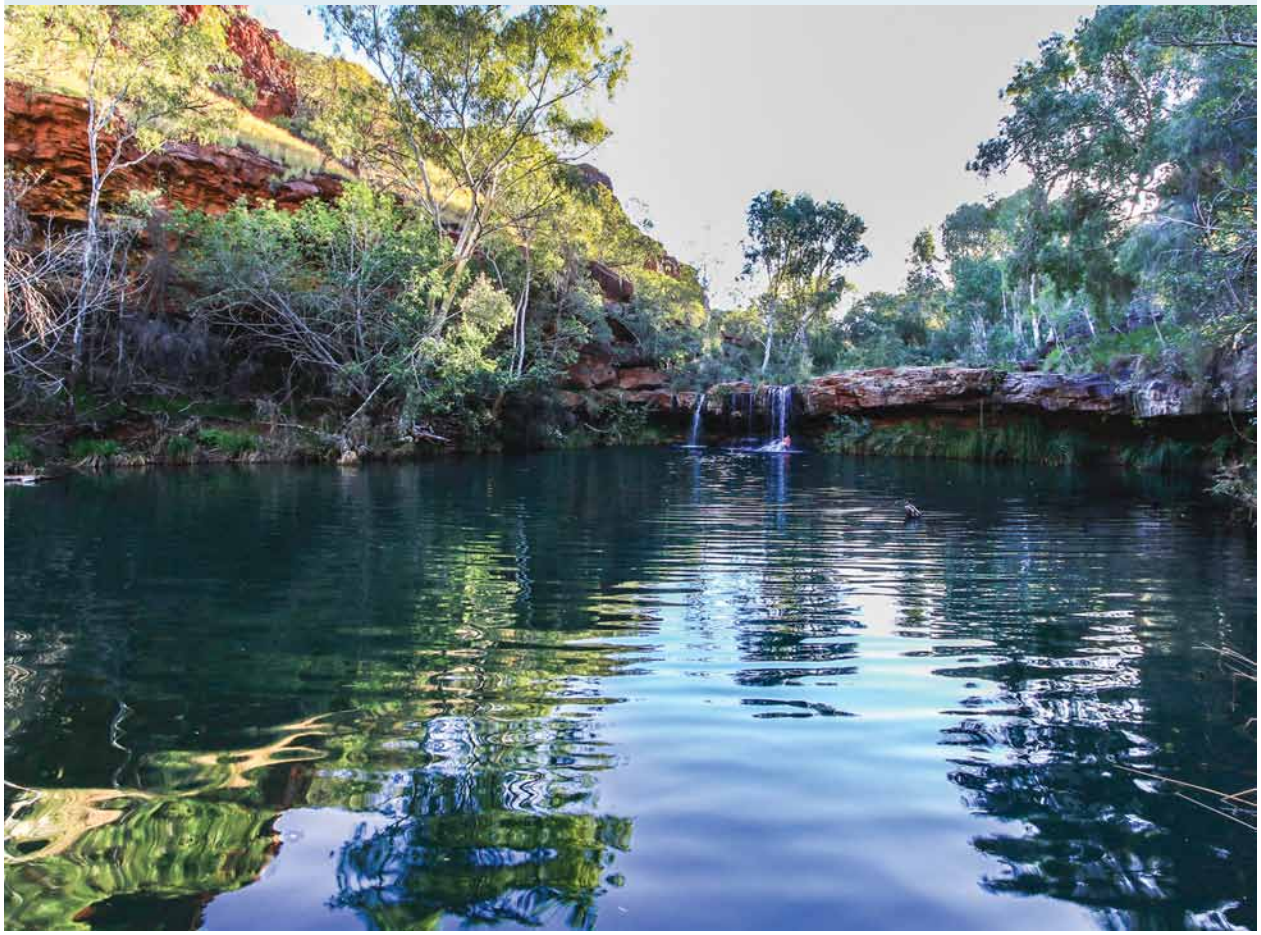
The Dreaming

Aboriginal and Torres Strait Islander Peoples' laws originated in the Dreaming. The Dreaming is an English term that refers to the origins and practice of Aboriginal and Torres Strait Islander beliefs and cultural systems. These communities have a very strong relationship with the land. They believe that they do not own the land — that the land is a spiritual part of them, and that there can be no separation of one from the other. The stories, songs and dances about the Dreaming reveal the many ways in which Aboriginal and Torres Strait Islander Australians are connected to the land.

Dreaming stories

Dreaming stories are used by elders to pass on customary laws and provide guidance and instructions about how to behave and the right way to live. Young people are expected to listen to their elders, be obedient, not be greedy or steal. Customary law covers food, family rules, marriage requirements and spiritual responsibilities. Songs and dances are used to pass down customary law.

FIGURE 2 Fern Pool, Karijini National Park. On the traditional lands of the Banyjima, Kurrama and Innawonga people. Aboriginal and Torres Strait Islander Australians believe that the Australian landscape and all its features were created by their ancestors.



SkillBuilder discussion

Communicating

1. How do Aboriginal and Torres Strait Islander Peoples believe Fern Pool was created?
2. How would creation information be passed from generation to generation?
3. Do you think these stories have been passed unchanged from generation to generation? Give reasons for your answer.

Dispute resolution

It is true that Aboriginal and Torres Strait Islander Peoples did not have governments, police, or courts in the same form as contemporary Western systems. However, this does not mean they lacked law, governance, social order, or systems of justice.

Rather, the elders would meet to discuss the incident or dispute and agree on an appropriate consequence or solution. Punishments ranged from public ridicule or shaming for minor offences to exile or spearing for serious cases. The Warlpiri people of Central Australia would spear the offender's thigh, leaving a scar as a reminder of their wrongful act.

18.7.2 Recording customary law

Customary law has not been **codified**. It is not easy to record. This is because it is not always the same throughout Australia. Different language groups and communities have their own customary laws, languages, beliefs and traditions. The laws that apply to one group do not necessarily apply to another group.

18.7.3 Customary laws and Australian law

Some state and territory laws have been amended to specifically refer to customary law — the Northern Territory's *Sentencing Act 1995* recognises customary law. Many courts have also taken customary law into account when considering sentences. Refer to the case study Court imposes customary punishment in section 18.7.4 for an example.

SkillBuilder discussion

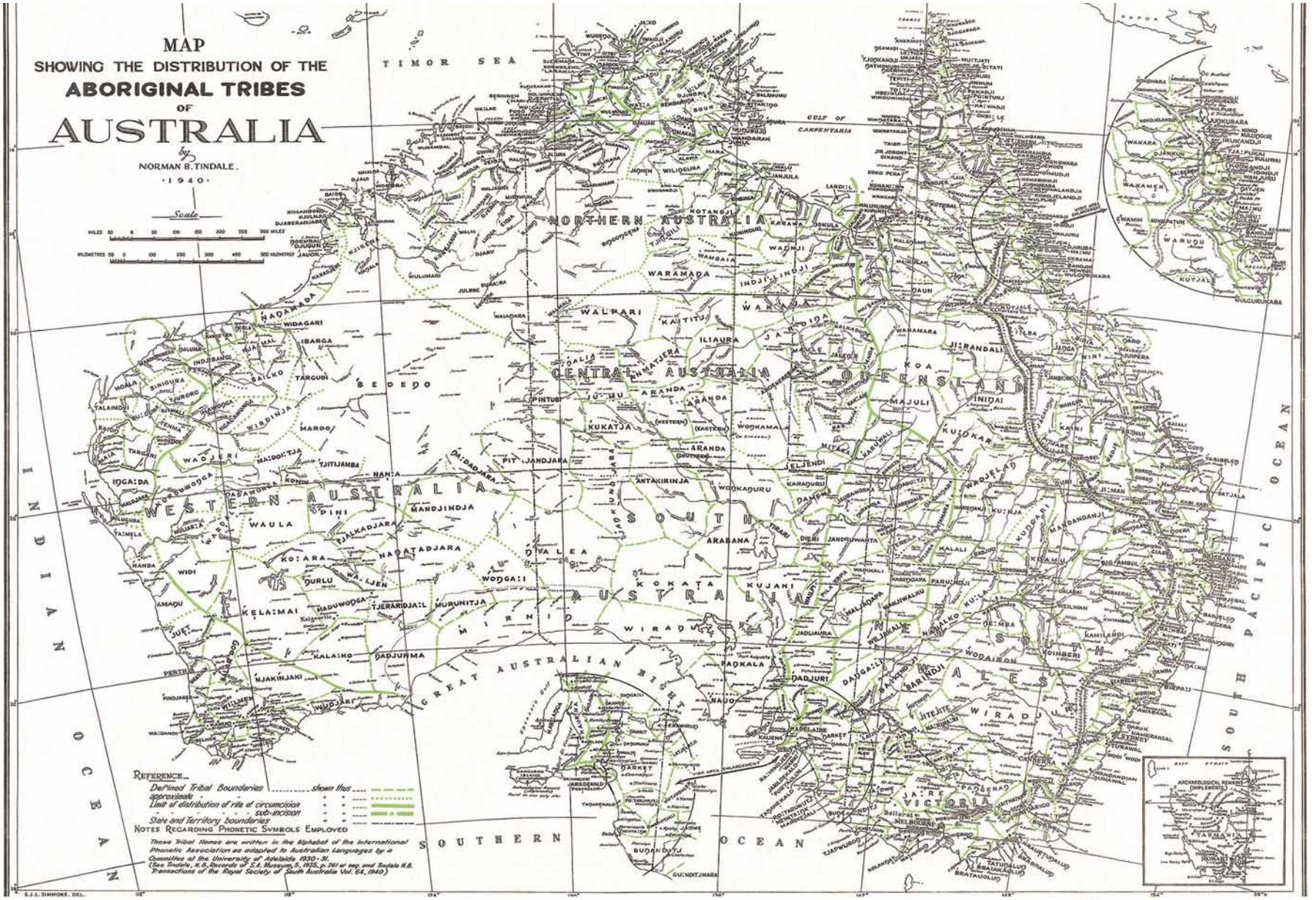
Evaluating democratic institutions and systems

Look at the map in **FIGURE 3** and discuss the ways that perspectives have changed over time.

Why do you think maps such as this one are highly contestable? Which aspects of this map would now be considered inappropriate or incorrect?

Users of this map should be aware that certain words, terms or descriptions may be culturally insensitive and may be considered inappropriate today, but may have reflected the creator's attitude or the period in which they were written. Borders and terminology used may be contested in contemporary contexts.

FIGURE 3 Map showing the distribution of the Aboriginal and Torres Strait Islander Peoples in Australia. Norman B. Tindale, 1940



Map Showing the Distribution of the Aboriginal Tribes of Australia, Norman B Tindale, 1940
Mitchell Library M3 804eca/1788/1 A

The Tindale Map is a historical map illustrating the diversity of Aboriginal languages groups across Australia.

Please note that this map is being made available for general reading and use. The map illustrates language groups according to anthropologist Norman Tindale in 1940. It is not the only Aboriginal language map available, and borders and terminology used may be contested in contemporary contexts.

The map is not suitable for use in native title, or other legal claims.

Users of this map should also be aware that certain words, terms or descriptions may be culturally sensitive and may be considered inappropriate today, but may have reflected the creator's attitude or the period in which they were written.

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CASE STUDY

Court imposes customary punishment

In 1993, Wilson Jagamara Walker became the first in Australia to receive a customary punishment as part of a sentence. Walker, a 23-year-old Aboriginal man from Central Australia, pleaded guilty to manslaughter after intervening in an attack and killing one of the attackers. Chief Justice Martin initially sentenced him to three years of imprisonment, but the sentence was suspended. Walker was released on a two-year good behaviour bond with the condition that he be speared in the thigh by the victim's relatives.

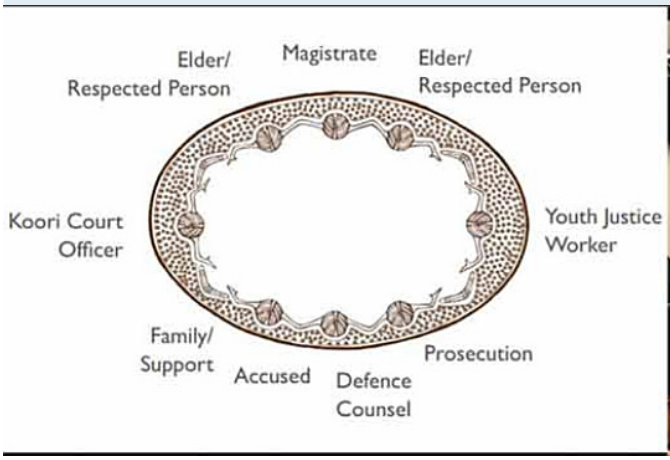
FIGURE 4 Wilson Jagamara Walker's case was the first in Australia to include a customary punishment as part of a sentence.

SkillBuilder discussion

Evaluating democratic institutions and systems

1. What is spearing?
2. Why do you think customary law uses this type of punishment rather than fines or imprisonment?
3. Suggest a reason why customary law is now being used alongside Australian law.

FIGURE 5 The Koori Court in Victoria provides a more informal environment for Aboriginal and Torres Strait Islander offenders, who must plead guilty if they wish to be sentenced here.



SkillBuilder discussion

Evaluating democratic institutions and systems

1. Look at **FIGURE 5**. What is the Koori Court?
2. Discuss how it differs from traditional courts.
3. Decide, with a partner, why this type of court might be needed.

In describing the customary punishment, Chief Justice Martin said:

'When you return to Yuendumu, you will be called upon to face tribal punishment ... by getting speared in each of your legs a couple of times in such a way that you will be pained for at least a couple of weeks ... A hunting spear would be used. The punishment would be administered by the brother of the dead man.'

Martin ordered police officers to witness the spearing so that they could verify that the sentence had been carried out. Walker was told to return to the court to have the sentence reviewed if this did not occur.

18.7.4 Alternative sentencing for Aboriginal and Torres Strait Islander offenders

Aboriginal and Torres Strait Islander offenders who plead guilty early may be offered alternatives to court-imposed sentences. One initiative is circle sentencing, which is widely used in New South Wales. This includes elders, the victim, the offender, their lawyer, the prosecutor and a magistrate sitting together to determine an appropriate sentence. This process aims to avoid imprisonment and is not used for serious charges like murder or sexual assault.

In circle sentencing, the offence is considered first; then, the offender's background and the effect on the victim and the community are discussed. Elders decide the sentence, which must be approved by the magistrate. Sentences often include good behaviour bonds, with conditions such as counselling or community service that involves culturally appropriate supervision. The aim is to break the cycle of offending.

Other states have similar programs:

- Western Australia: Aboriginal Community Courts
- Victoria: Koori Courts
- South Australia: Nunga Courts

The territories also have circle or community courts. These courts involve Aboriginal and Torres Strait Islander community members and are less formal than traditional courtrooms.

Positive outcomes for Aboriginal and Torres Strait Islander offenders

According to the 2021 census, Aboriginal and Torres Strait Islander Peoples make up 3.8 per cent of the Australian population but account for 32 per cent of the prison population. This over-representation is due to unequal social positions and cultural differences.

Circle sentencing has been effective in lowering reoffending and imprisonment rates when compared to sentencing through traditional courts. This is because the underlying causes of offending, such as drug and alcohol addiction, are addressed.

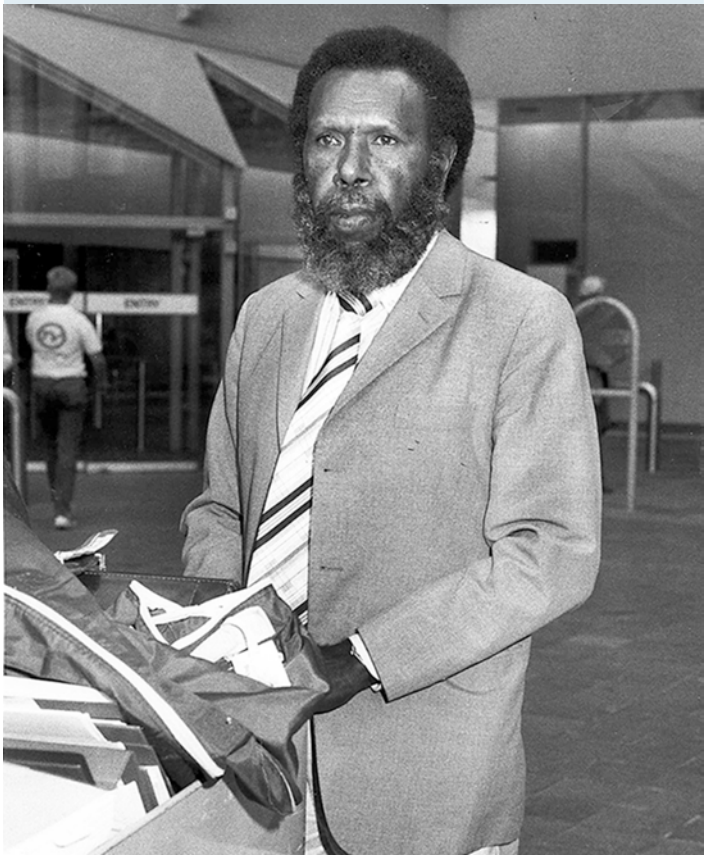
One criticism of this approach to sentencing is that the accused is required to plead guilty. This undermines the presumption of innocence, where the prosecution is required to establish the guilt of the defendant.

In 2018, the Victorian Supreme Court ruled that Aboriginal and Torres Strait Islander Australians' cultural rights should be considered when sentencing offenders, and that a request to be sentenced by the Koori Court is appropriate and cannot be refused.

18.7.5 Native Title Law and Aboriginal and Torres Strait Islander Peoples

Mabo Day occurs during Reconciliation Week and is celebrated as an official holiday by Torres Strait Islanders. It commemorates the High Court decision handed down on 3 June 1992, which overturned the notion of **terra nullius** and recognised the rights of Aboriginal and Torres Strait Islander Peoples of Australia to their land and waters, and led to the passing of the *Native Title Act 1993*. The decision marked the end of a ten-year struggle by Eddie Mabo and the Meriam people in the Torres Strait over the right to their land.

FIGURE 6 Eddie Mabo successfully challenged the concept of *Terra nullius* in the High Court and paved the way for subsequent claims under the *Native Title Act 1993*.



Following the decision in the Mabo case, the Commonwealth Parliament passed the Native Title Act in 1993, codifying (see section 18.5.3) the decision and creating the process settling and protecting native title claims. A native title claim can be made where Aboriginal and Torres Strait Islander Australians can demonstrate a continuing connection to the land.

This connection is much easier to establish to the land before European colonisation; however, issues arise where people were dispossessed and forced off their lands. Native title cannot be claimed where other valid rights exist, such as home ownership, or where free access is required, such as marine access. It has been found to exist on vacant Crown land such as parks, public reserves, or where the Commonwealth has granted pastoral or mining leases.

Approximately 50 per cent of Australia is covered by native title; of this, Aboriginal and Torres Strait Islander communities have exclusive possession of around 34 per cent, with the rest shared, such as land subject to pastoral or mining leases.

Use the **Creative Spirits** weblink to learn more about native title and land rights.

18.7 SkillBuilder activity PARTICIPATING IN CIVIC PROCESSES

Work with a partner to **investigate** one of the circle sentencing courts.

1. **Explain** why the court was established.
2. **Explain** how the court works and the types of cases it sentences.
3. **Identify** one case that has been resolved by a circle sentencing court, make a **summary** of the facts of the case and the judgement made by the court.

18.7 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 5, 7, 9	6, 8, 10

REMEMBER AND UNDERSTAND

1. Customary law refers to the guidelines for behaviour that were developed by **British courts** / **Aboriginal and Torres Strait Islander peoples** / **Australian courts**.
2. **Identify** how elders are involved in the administration of justice in cases involving young Aboriginal and Torres Strait Islander offenders in Victoria.
   - A. They are never involved.
   - B. They act as lawyers for the offender.
   - C. They keep the offender in their custody until sentencing.
   - D. They participate in determining the punishment handed down to the offender.
3. **Identify** an example of legislation that recognises customary law in Australia.
   - A. The Northern Territory Sentencing Act
   - B. The Constitution of Australia Act
   - C. The Racial Discrimination Act
   - D. Sex Discrimination Act
4. **Explain** why it is difficult to codify customary law.
5. **Summarise** why many politicians and lawmakers in the early years of colonisation and federation did not understand that Aboriginal and Torres Strait Islander Peoples had incredibly detailed customary laws that governed their societies.

ANALYSE AND APPLY

6. Read the case study Court imposes customary punishment. **Outline** the way in which the judge incorporated customary law into the sentence imposed on Mr Walker.
7. **Identify** two reasons for recognising customary law as part of Australia's legal system.

EVALUATE AND COMMUNICATE

8. **Consider** whether new courts should be established to reflect the traditional laws of other ethnic or religious groups in Australia. For example, **consider** whether an Islamic court should be established so that Muslim offenders could be sentenced according to sharia law.

   State one argument for or against this idea.
9. **Recall** as many reasons as you can to **explain** why Aboriginal and Torres Strait Islander Peoples find customary laws significant.
10. If there is a conflict between Aboriginal and Torres Strait Islander Peoples' law and laws legislated by parliament, **explain** which should apply. **Justify** your point of view.

Answers and sample responses for this topic are available online.

LESSON 18.8 Inquiry: Does Australia need a bill of rights?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **summarise** the arguments for and against Australia's need for a bill of rights.
- **compare** Australia to another western democracy.

Background

In this inquiry you will **investigate** whether Australia needs a bill of rights.

Did you know?

Many countries throughout the world have a bill of rights or charter of rights to protect the human rights and freedoms of their citizens. Australia is one of the few western democracies that does not have a bill of rights.

FIGURE 1 The United States, Britain, Canada and New Zealand are all countries with similar democratic systems to us that have a bill of rights or a charter of rights.

A bill of rights can be part of a country's constitution, in which case it can be difficult to change; or it can be legislation passed by parliament, which can be changed by that parliament at any time, if most members of parliament support that change.

Many people say that a constitutional bill of rights would better protect the rights of citizens, because it cannot be easily changed. Victoria, Queensland and the Australian Capital Territory have all introduced legislated charters of rights.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching

- What is a bill or charter of rights?
- How does a bill or charter of rights protect rights and freedoms?
- How does a bill of rights operate in another country?
- Why doesn't Australia have a bill of rights?
- How are rights and freedoms protected in Australia (e.g. freedom of speech, right to silence)?
- What can people do in Australia and overseas if they think their rights have been affected by the actions of government or someone else?
- Now choose one of your questions as your inquiry question.

Step 2: Analysis, evaluation and interpretation

Begin by **investigating** the Bill or charter of rights in one of these countries:

- Britain
- Canada
- New Zealand
- United States of America.

Use the **Charter of rights** weblinks in the Resources panel to get you started.

Make notes under your inquiry questions.

Step 3: Civic participation and decision-making

- **Propose** possible reasons for Australia having a bill of rights.
- What options does Australia have for obtaining a bill of rights?
- **Explain** how a bill of rights supports a democratic society.

Evaluating political and legal institutions

- **Create** a table that shows the advantages and disadvantages of having a bill of rights.
- How are rights protected in Australia?
- Are these protections enough, or does more need to be done?

Step 4: Communicating

Select a format to **present** your point of view. This could be a short video, a mock TV interview or a PowerPoint presentation.

LESSON 18.9 Review

18.9.1 Key knowledge summary

Use this dot-point summary to review the content covered in this topic.

18.2 Why do we need laws?

- Society has both legal and non-legal rule.
- Non-legal rules apply to specific groups and may differ between groups, such as school rules.
- Legal rules apply to everyone in the community, such as road laws.
- There are five characteristics of effective laws.

18.3 How do parliaments make laws?

- Statute law (or an Act or legislation) must be passed through both houses of parliament in the form of a bill, which must then be approved by the Crown.

18.4 How do courts make laws?

- Courts make laws because they interpret laws and make decisions to resolve the cases they are hearing, and in doing so create precedents that will be followed by other courts.

18.5 What is the relationship between parliament and courts in lawmaking?

- Parliament and courts perform different roles in the legal system.
- Parliament and courts work together to make the legal system work effectively.
- Courts interpret statutes and can alert parliament to the need for a change in the law.
- Parliament creates courts and can change the laws they make.

18.6 What is the difference between civil and criminal law?

- Criminal law protects the community as a whole. It incorporates crimes including robbery, manslaughter and murder. The police or a representative of the government (the prosecution) takes the accused (the defendant) to court. There, a consequence, such as a fine or imprisonment, may be imposed.
- Civil law protects the private rights of individuals. It incorporates civil wrongs including negligence, defamation and breach of contract. A person who feels that a civil wrong has been done to them (the plaintiff) will sue the other party (the defendant) in court.

18.7 What is customary law in Aboriginal and Torres Strait Islander communities?

- Aboriginal and Torres Strait Islander customary law provides guidance for how to behave and live. Disputes or incidents are resolved by the elders, who agree on an appropriate solution or consequence.
- Sentencing courts that incorporate customary law have had positive outcomes.
- Native title law has recognised land rights of Aboriginal and Torres Strait Islander Peoples.

18.8 Inquiry: Does Australia need a bill of rights?

- Australia is one of the few western democracies that do not have a bill of rights.
- In this Inquiry students investigate the bill of rights in another country and whether one is needed in Australia.

18.9.2 Key terms

abrogate to pass an Act of Parliament to cancel or abolish a law (precedent) made by the courts
accused the party in a criminal trial against whom an action has been brought
Act a law passed by parliament
bill a proposed law that has not yet been agreed to by parliament or received royal assent
balance of probabilities requires reasonable satisfaction that the facts as presented are probably correct and occurred as stated
beyond reasonable doubt based on evidence, there is no other logical conclusion that can be made other than that the accused is guilty
binding precedent a decision made in a higher court in the same court hierarchy that must be followed by a lower court where the facts of the cases are similar
breach of contract a situation where a legally binding agreement is not honoured by one or more of the parties to the contract
burden of proof the legal principle describing who has to prove a case in court. In a criminal trial, this burden is on the prosecution.
Cabinet the main group of parliamentary members from the governing party
codified refers to laws that have been collected and organised, usually in written form
common law law developed by judges through the decisions of courts
Crown the King's authority in the Australian parliament, represented by the governor-general at the federal level and a governor at the state level
customary law rules for behaviour developed by and for Aboriginal and Torres Strait Islander Peoples
defamation unlawful damage to a person's good reputation through written or verbal statements
defendant the party in a civil trial against whom an action has been brought
democracy a form of government in which the people determine how they will be governed
dispute an argument
homicide the killing of one person by another person
jury in a criminal trial, a randomly selected group of people who decide the guilt or innocence of an accused person
indictable offence a serious criminal offence such as murder or armed robbery
legislation a law made by parliament
liable legally responsible for a civil wrong
magistrate a court official who hears cases in the lowest court in the legal system
manslaughter the accidental or unintentional killing of one person by another person
negligence a situation where a person breaches a duty to exercise reasonable care to avoid a foreseeable risk, resulting in another person being injured or suffering a risk of injury
nuisance interference with someone's enjoyment of public or private property
opposition the main political party in the lower house of parliament that's not in power
persuasive precedent a decision made in a lower court or a court in a different hierarchy that does not have to be followed but may be used as a guide
plaintiff the person who commences a legal action in civil law
precedent a legal principle developed by a court in the process of resolving a dispute
presumption of innocence a person charged with a criminal offence should be treated as innocent, until evidence presented in court proves they are guilty
prosecute to take legal action against another person for a criminal offence
referendum the process of allowing the people to vote on an important issue that will result in a change to the Australian Constitution
rule of law a legal principle that all citizens are subject to the law and equal before the law. The law applies equally to all citizens regardless of status or wealth.
standard of proof the level of proof required to establish a case. In criminal law, the prosecution must prove that the accused is guilty beyond reasonable doubt.
statute law law made by parliament
statutory interpretation the process used by judges to decide the meaning of words or phrases in a statute (Act of Parliament)
summary offence a minor criminal offence such as a road traffic offence and minor assault
tabled in parliament the document has been presented to the parliament and laid on the table in either or both houses of parliament. This means it is available to members for review.

terra nullius ('land belonging to no-one') in Australia, the legal idea that since no-one was 'using' the land when the first Europeans arrived, it could be claimed by the British Crown
trespass a tort (civil wrong) involving direct and intentional interference with a person, or a person's land or goods

18.9.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview:

Where do our laws come from and why should they be obeyed?

1. Now that you have completed this topic, what is your view on the question? **Discuss** with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

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Post-test	Online post-test
eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary

18.9 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 6, 9, 10, 12	3, 4, 5, 7, 8, 11	13, 14, 15

REMEMBER AND UNDERSTAND

1. Parliament makes laws by passing bills. Identify what must happen for a bill to become a law.
   A. Pass the lower house, pass the upper house and receive royal assent
   B. Be passed by the Labor Party, be passed by the Liberal Party and be approved by the governor-general
   C. Be passed by a lower court, be passed by a higher court and receive the approval of the High Court
   D. Be agreed to by all of the parties
2. Following the decision of the Mabo case, the Commonwealth Parliament passed the Native Title Act, which included the court ruling. Identify the aspect of the relationship between Parliament and the courts that this reflects.
   A. Abrogation
   B. Statutory interpretation
   C. Codification
   D. Consideration

3. Identify the name given to a law made by the courts.
   A. Legislation
   B. A bill
   C. An Act
   D. Common law
4. Review the following statements and identify which involves a precedent.
   A. Parliament passing new laws banning smoking
   B. A court finding that a contract existed due to a ruling made in a similar case in a higher court
   C. A court imposing a penalty for non-payment of speeding fines
   D. Parliament blocking a new law for immigration
5. Rights are protected in several ways in Australia. Identify which of the following is not one of these ways.
   A. Common law
   B. The Australian Constitution
   C. A bill of rights
   D. Legislation
6. Criminal laws are the laws made to:
   A. be passed by both houses of parliament and approved by the Crown.
   B. protect the community from harm.
   C. develop legal principles in the process of courts resolving disputes.
   D. protect the private rights of individuals.
7. Suing another person for negligence is an example of which law?
   A. Criminal law
   B. Statute law
   C. Contract law
   D. Civil law
8. Identify the standard of proof in a criminal case.
   A. On the balance of probabilities
   B. With room for some doubt
   C. Beyond reasonable doubt
   D. When the jury does not like the person
9. Under customary law, how are disputes or incidents resolved?
   A. Police will charge you and take you to court.
   B. Courts will examine all the evidence before them.
   C. Elders agree on an appropriate solution or consequence.
   D. Parliament passes laws through both houses.
10. Identify the statement that best describes Aboriginal and Torres Strait Islander Peoples' customary law.
   A. Laws passed through parliament that only apply to Aboriginal and Torres Strait Islander Peoples
   B. Civil law that only applies to Aboriginal and Torres Strait Islander Peoples
   C. The rules and guidelines for behaviour for Aboriginal and Torres Strait Islander Peoples
   D. One set of rules for behaviour that applied in Aboriginal and Torres Strait Islander cultures before colonisation

ANALYSE AND APPLY

11. **List** the steps involved when laws are made.
12. **Explain** the difference between criminal and civil law.
13. **Explain** what is meant by customary law and explain how it originated.
14. **Describe** the characteristics of effective laws.
15. The 'bounds of law' place limitations on free speech. Using an example, **explain** what is meant by this phrase.

Answers and sample responses for this topic are available online.

19 Citizenship, diversity and identity

LESSON SEQUENCE

19.1 Overview 562
19.2 What does national identity mean in a globalised world? 564
19.3 How has Australia's identity been shaped? 570
19.4 What are the different perspectives on national identity in Australia? 575
19.5 Inquiry: What is the future of Australia Day? 578
19.6 Review 580

LESSON 19.1 Overview

INQUIRY QUESTION

How is Australia's democratic and cohesive society maintained?

19.1.1 Introduction

For tens of thousands of years, Australian society existed without significant influence from the outside world. Living in relative geographical isolation, the Aboriginal and Torres Strait Islander Peoples developed a distinct, yet varied culture. This changed abruptly with the arrival of European settlers, who brought with them their own culture and traditions.

For over 200 years, different waves of immigration have continued to bring new cultures, traditions and customs to Australia, creating a complex tapestry of national identity. The impact of external influences on Australian culture and identity has continued to grow, fuelled by factors such as popular culture and media. In this topic, you will investigate the development of Australian identity in the context of the global community. You will discuss how and why Australian identity has evolved.

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- **Pre-test**
  Online pre-test
- **eWorkbook**
  Customisable worksheets for this topic
- **Digital document**
  Key terms glossary
- **Video eLesson**
  Citizenship, diversity and identity

SkillBuilder

Use our SkillBuilder activities to get instant feedback on the Civics and Citizenship concepts and skills of:

- **INVESTIGATING CONTEMPORARY CIVICS AND CITIZENSHIP ISSUES**
- **EVALUATING DEMOCRATIC INSTITUTIONS AND SYSTEMS**
- **PARTICIPATING IN CIVIC PROCESSES**
- **COMMUNICATING**

LESSON 19.2 What does national identity mean in a globalised world?

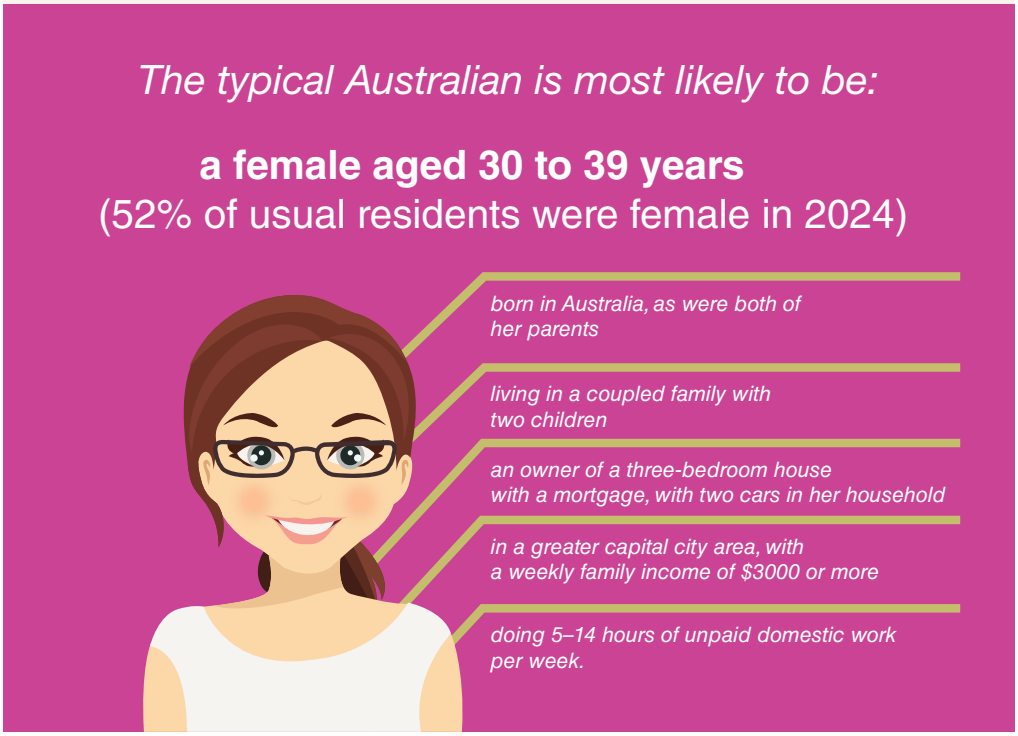
LEARNING INTENTION

By the end of this lesson, you should be able to **describe** what is meant by national identity.

Tune in

The image in **FIGURE 1** represents the 'typical' Australian according to the most recent Australian census data.

FIGURE 1 The typical Australian



Source: Adapted from Australian Bureau of Statistics

1. **Were you surprised by any of the characteristics shown in this image?**
2. **Discuss your own ideas of who you consider to be the 'typical' Australian.**

19.2.1 *'We are one, but we are many…'*

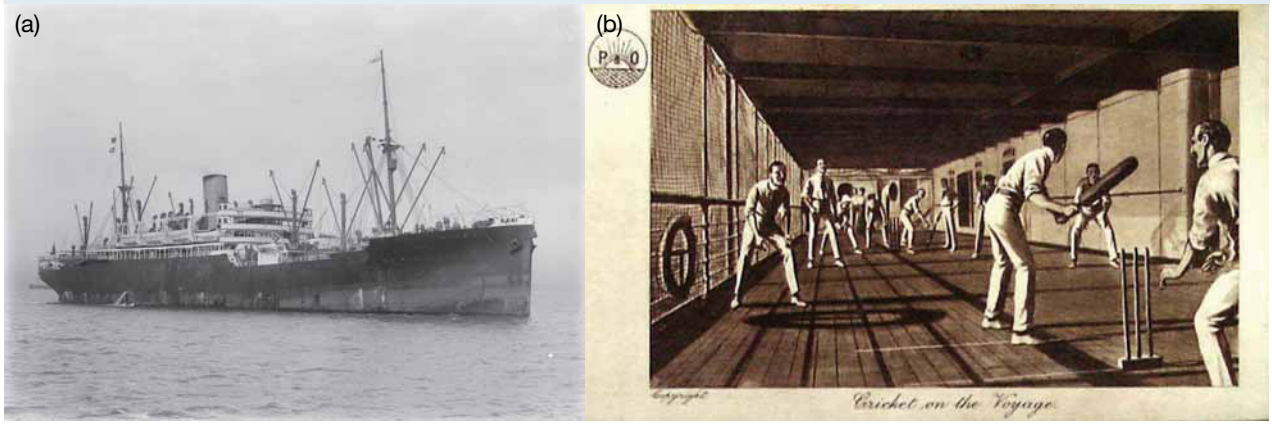
You may have heard the song 'I am Australian' with its famous line 'we are one, but we are many'. It is a relatively old song, from the 1980s, but the lyric captures an important reality about Australian identity. Our nation has been shaped by both Aboriginal and Torres Strait Islander Peoples' ancient connection to Country and successive waves of immigration over many generations. It is impossible to assign one singular identity to the people of Australia — instead, our identity is defined by our diversity. In an increasingly globalised world, this diverse identity continues to evolve and develop.

19.2.2 The globalised world

The relationship between globalisation and national identity is fascinating. If we go back in time before the era of globalisation, it is far easier to isolate unique national identities. Individual countries had distinct national cuisine, music, fashion and other cultural characteristics.

Global travel and international trade have blurred the lines between these cultural distinctions. The greater movement of people and ideas has increased the transmission of cultural characteristics between countries. Although many distinctions still exist, they are far less obvious than they were 100 years ago.

FIGURE 2 **(a)** Commonwealth Government Line, T.S.S. *Jervis Bay* passenger ship bringing people to Australia circa 1900
(b) 'Cricket on the Voyage', from a bound album of postcards published by Peninsular and Oriental Steam Navigation Co. circa 1915.



SkillBuilder discussion

Investigating contemporary Civics and Citizenship issues

1. Study **FIGURE 2**. Who would be the likely passengers travelling between England and Australia?
2. Discuss likely facilities and conditions on passenger ships around the 1900s.

Consider the following:

- In the early 1900s, it would have taken you between 30 and 40 days to travel from Melbourne to London.
- In 1972, it would have taken you over 48 hours to fly between the two cities, including several stopovers.
- Now, you can fly the route directly in only 22.5 hours.

This reduction in time is evidence of the technological developments that have changed the world so dramatically. Rapid improvements in transport and information communication technology have combined to effectively make the world a smaller place. It has never been easier for people to move around the world and it has never been easier for people to communicate with one another. These improvements have resulted in increased global connectedness, trade and cultural exchange — a process known as **globalisation**.

Examples of globalisation are all around you. Your phone, your clothes, the ideas you hold and even some of the friends that you have are all outcomes of an increasingly globalised world. Globalisation has many positive and negative aspects. While it is easier for us to travel, to trade and to share ideas, globalisation comes at a huge environmental cost, especially as most of the world still relies on fossil fuels for energy. Globalisation can have, and is having, a significant impact on cultural identity.

19.2.3 Globalisation and national identity

If we go back in time before the era of globalisation, it is far easier to isolate unique national identities. Individual countries had distinct national cuisine, music, fashion and other cultural characteristics. Globalisation has blurred the lines between these cultural differences. As people and ideas move more easily around the world, different cultures share and mix their traditions and ways of life. Although many differences still exist, they are far less obvious than they were one hundred years ago.

The spread of the English language is one example of this trend. In 1900, English was the third most spoken language in the world, behind Spanish and Chinese/Mandarin. English overtook Spanish in 1912 and, over 100 years later, English eclipsed Chinese/Mandarin as the most spoken language in the world. English is now the official language of 67 countries and is seen as the major language of business, diplomacy and international communication.

Homogenisation

Some people might worry that globalisation leads to cultural homogenisation — where countries start to lose their unique identities. This happens because people in different countries are watching the same shows, buying the same products and sharing the same information. Halloween is a perfect example of cultural homogenisation.

FIGURE 3 Two children dressed up for Halloween ready to trick or treat

Halloween, originating from the Celtic festival Samhain over 2000 years ago, was transformed into its modern form in the United States. Though not traditionally celebrated in Australia, it is now widely observed with house decorations and 'trick or treating' becoming common in Australian suburbs.

The popularity of Halloween has increased in recent times, largely due to the presence of US popular culture in Australia through TV and then social media. Such has been the growth of Halloween celebrations in Australia that supermarkets regularly record 25 per cent increase in pumpkin sales during October. While Halloween is a relatively harmless example of cultural homogenisation, it does prove how quickly this phenomenon can occur.

Ceremonies or spectacle

Globalisation can lead to **cultural tokenism**, whereby national identity is reduced to mere gestures. For example, using a poorly produced boomerang in a lesson on Aboriginal and Torres Strait Islander culture without understanding its context is disrespectful and inaccurate. This can offend those who genuinely follow these customs. A better approach would be to invite local Aboriginal and Torres Strait Islander Peoples' representatives to share their history and tools, ensuring a respectful and authentic learning experience.

Conclusions on identity

Globalisation's impact on national identity can be both positive and negative. It may dilute unique cultural traits but also promote cultural exchange and understanding. As long as traditional values are respected, globalisation and national identity can coexist.

In a pluralist society, active citizenship involves upholding the values of pluralism. Each Australian citizen has rights and responsibilities in this respect. According to the Australian Department of Home Affairs, these responsibilities protect and enhance pluralism.

An issue arises when some migrants opt for Australian citizenship while others do not. Although Australia permits dual citizenship, other countries may not, forcing some migrants to renounce their original citizenship to become Australian.

Most migrants to Australia who apply for citizenship must sit a 'citizenship test' as part of the citizenship process. This test is based on their knowledge of:

- Australia and its people
- Australian democratic beliefs, rights and liberties
- government and the law in Australia
- an understanding of and commitment to Australian values based on freedom, respect and equality.

FIGURE 4 Australian citizenship means that you can apply for an Australian passport.

You can practise the test by visiting the immigration and citizenship page of the Department for Home Affairs website.

SkillBuilder discussion

Evaluating democratic institutions and systems

1. Becoming a citizen of Australia is not easy. Make a list of what you might need to do to be considered for Australian citizenship.
2. What do you think are the most important responsibilities of being an Australian citizen?

SkillBuilder discussion

Evaluating democratic institutions and systems

1. View the responsibilities of an Australian citizen (**FIGURE 5**). Discuss what is meant by 'Australia's democratic values' and 'rights and liberties of Australia'.
2. In pairs, discuss whether the responsibilities are fair.

FIGURE 5 The responsibilities of an Australian citizen

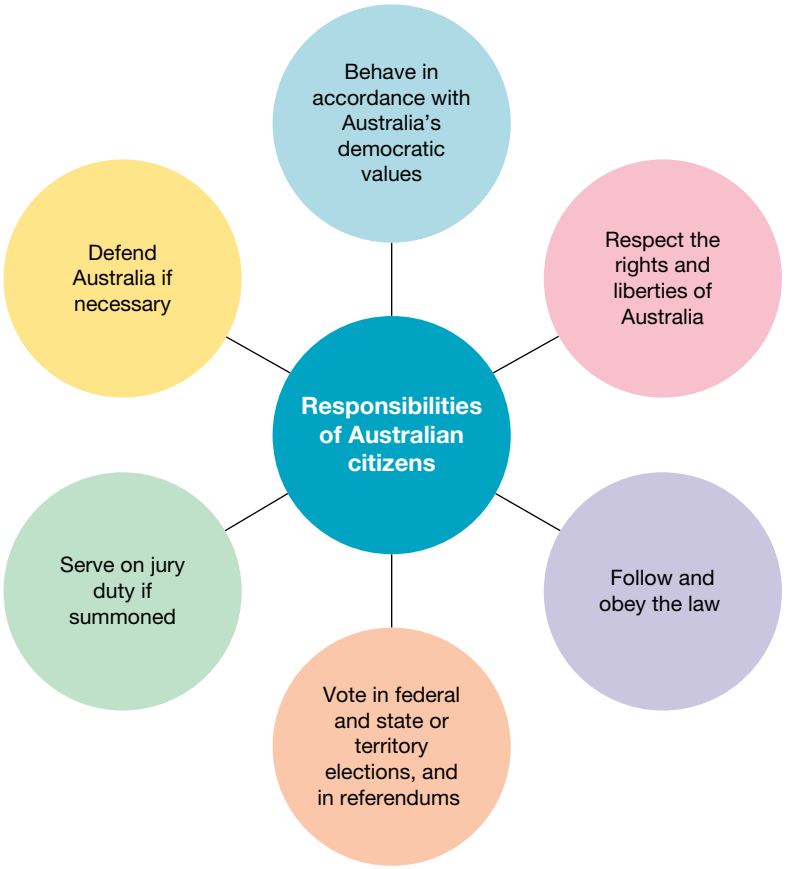


FIGURE 5 shows the rights and responsibilities we have as Australian citizens. However, as our country is part of the global community, we also need to consider our role as global citizens. According to the Oxfam International definition of **global citizenship**, these responsibilities include those shown in **FIGURE 6**.

FIGURE 6 The responsibilities of a global citizen

As you can see, being an active global citizen is no easy task, especially when you consider that active global citizens also need to be active citizens of their own countries. However, to maintain the strength and cohesion of our communities, it is important that we have an understanding of our roles and a willingness to participate.

19.2 SkillBuilder activity

As you have learned in this lesson, globalisation has several key positive and negative impacts on contemporary society. In this SkillBuilder Activity, you will **evaluate** the impacts that globalisation can have on national identity.

When you evaluate something, you need to make a judgement. If you are evaluating a cake, you would judge it by its taste, texture and appearance. If you are evaluating an issue, such as globalisation, you need to set parameters which enable you to make that judgement. For this activity, you may wish to use categories of factors to help you. For example, what are the social, environmental and economic impacts of globalisation?

19.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 3, 5	1, 4, 7	6, 8

REMEMBER AND UNDERSTAND

1. Most Australians are or are descended from:
   - **A.** emigrants.
   - **B.** immigrants.
   - **C.** colonialists.
   - **D.** convicts.
2. It is often said that Australia's national identity is characterised by:
   - **A.** its diversity.
   - **B.** its age.
   - **C.** its language.
   - **D.** its people.
3. **Identify** the two areas in which technology improvements have facilitated globalisation.
   - **A.** Mobile phones
   - **B.** Transport
   - **C.** Machinery
   - **D.** Information technology
   - **E.** Robotics
4. **Identify** two positive and two negative consequences of globalisation.
5. **Define** the term *cultural homogenisation*.

ANALYSE AND APPLY

6. **Explain** why it is so difficult to assign one singular view of Australian national identity.

EVALUATE AND COMMUNICATE

7. **Outline** whether the benefits of globalisation outweigh its negative consequences. **Explain** your opinion.
8. **Compare** the responsibilities of individuals as both Australian citizens and global citizens.

Answers and sample responses for this topic are available online.

LESSON 19.3 How has Australia's identity been shaped?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** factors that have shaped debates about Australian identity.

Tune in

To help you think about this lesson, consider the history of your family, caregiver or someone else important to you in Australia. You can quietly reflect on the following questions or discuss them with a partner if you feel comfortable.

1. **How did your family, caregiver or someone else close to you come to Australia, and what was their journey like?**
2. **What kinds of challenges might people who move to Australia face, either now or in the past, as they settle in and adjust to life here?**

FIGURE 1 Immigration arrivals

19.3.1 Diversity as identity

Because ours is a pluralist society, it is difficult to define Australian identity. The identity of a pluralist society will, by definition, be as diverse as the backgrounds of its citizens. Our history has featured several waves of immigration that have brought new cultures, traditions and beliefs to our shores. Each wave has contributed to the diverse cultural identity that we see in Australia today. We see evidence of these changes in different aspects of daily life including food, music and fashion. In this lesson, we will consider how waves of immigration have contributed to the evolution of Australian identity.

FIGURE 2 Shaped by waves of immigration, Australia's diverse cultural identity continues to develop.

19.3.2 Aboriginal and Torres Strait Islander identities

One significant misunderstanding by early European settlers was the assumption that Aboriginal and Torres Strait Islander Peoples lacked an identifiable civilisation and culture. The settlers failed to understand the rich cultural practices and social structures of Aboriginal and Torres Strait Islander communities, which led to the incorrect belief that their cultures did not exist. This misconception played a key role in the British claim of terra nullius (the idea that the land was unoccupied).

In reality, Australia was home to Aboriginal and Torres Strait Islander Peoples for tens of thousands of years before European settlement. These groups had complex social, cultural and spiritual systems.

Aboriginal and Torres Strait Islander Peoples have lived in Australia for at least 65 000 years, having first arrived via a land bridge that once connected Australia with Papua New Guinea. Some key points to note:

- Aboriginal and Torres Strait Islander populations flourished with strong family connections and deep spiritual connection with the land.
- More than 500 distinct nations developed across the country, each with unique geographic boundaries.
- Cultural and language differences existed between nations, but they were linked by kinship and connection to Country.
- Kinship established relationships and responsibilities within the community and is still central in contemporary Australian culture.
- Country refers to more than a physical location; it signifies a sacred place that must be protected and preserved.
- Aboriginal and Torres Strait Islander culture is seen as the origin of the close connection many Australians have with their natural environment.

19.3.3 European settlement

The arrival of the First Fleet in 1788 and the subsequent development of colonial settlements across Australia significantly altered the country's physical and cultural landscapes. The first meetings between European settlers and Aboriginal and Torres Strait Islander Peoples were mostly peaceful. This changed as settlers began to push Aboriginal and Torres Strait Islander Peoples away from their lands, and cultural differences and misunderstandings between the two groups led to growing conflict.

Competition for resources, resistance against the Europeans and the introduction of European diseases such as smallpox **decimated** Aboriginal and Torres Strait Islander communities. By 1798 — just 20 years after the arrival of the First Fleet — it is estimated that Aboriginal and Torres Strait Islander population had been reduced by 90 per cent.

SkillBuilder discussion

Investigating contemporary Civics and Citizenship issues

1. European settlers brought diseases, resulting in devastating population losses of Aboriginal and Torres Strait Islander Peoples. What do you know about smallpox and why would this have affected Aboriginal and Torres Strait Islander Peoples of the time?
2. Can we compare this to modern-day pandemics? Discuss.

FIGURE 3 An extract from a letter by Newton Fowell, an early British settler in Australia, known for his role in the First Fleet.

Every boat that went down the harbour found them lying dead on the beaches and in the caverns of the rocks … They were generally found with the remains of a small fire on each side of them and some water left within their reach.

Lieutenant Fowell, 1789

Source: taken from First Fleet Texts. http://acms.sl.nsw.gov.au/_transcript/2015/D36453/a619.html Mitchell Library, State Library of New South Wales Letter received by John Fowell from Newton Fowell, 31 July 1790 Page 3 MLMSS 4895/1/21

Not only did these interactions with Europeans have a horrific impact at the time, but they have continued to influence Aboriginal and Torres Strait Islander communities, leaving a legacy of disadvantage and **marginalisation**. Unfortunately, we still see aspects of this disadvantage in Aboriginal and Torres Strait Islander communities today, as detailed in **TABLE 1**; measurements of wellbeing for Aboriginal and Torres Strait Islander Peoples are lower than those of non-indigenous Australians in all indicators listed.

TABLE 1 Differences in wellbeing statistics for Aboriginal and Torres Strait Islander Peoples and non-indigenous Australians (ABS 2023)

Wellbeing indicator	Aboriginal and Torres Strait Islander Peoples of Australia	Non-indigenous Australians
Male life expectancy	71.9 years	81.3 years
Female life expectancy	75.6 years	83.2 years
High school completion rate (Years 7–12)	59%	89%
Median weekly income	$830	$1124

SkillBuilder discussion

Investigating contemporary Civics and Citizenship issues

1. Discuss the data in **TABLE 1**. Suggest reasons for these figures.
2. What other data might be useful in showing differences in wellbeing for Aboriginal and Torres Strait Islander Peoples and non-indigenous Australians?

It is important to remember the negative impacts that European settlement had on Aboriginal and Torres Strait Islander communities. We also need to consider the other ways in which this period of Australian history influenced the evolution of our national identity. British colonisation of Australia left our country with significant links to Britain, particularly in regard to aspects of popular culture. British sport, literature, music, customs and traditions were all very much incorporated as a part of Australian life. In fact, it was our connection to Britain, as a member of its empire, which directly led to Australia's involvement in World War I.

19.3.4 The bonds of war

Over 400 000 Australians enlisted in the First Australian Imperial Force (AIF) during World War I, with 60 000 losing their lives. The horrors of war left many soldiers with physical and psychological scars. Some soldiers found it difficult to return to their previous jobs and lives and it took the entire country time to recover as a nation. Amidst the hardship of war, however, came one of the most frequently debated parts of Australia's cultural identity — the concept of mateship.

The word *mateship* is commonly associated with Australian 'diggers' who fought in World War I and, more specifically, at Gallipoli. The word itself conjures images of soldiers risking their own lives to help injured comrades. The concept of mateship in Australian culture gained prominence in the early twentieth century through the works of poets such as Henry Lawson. The romantic view of mateship was further enshrined in Australian culture through stories of war and resilience.

Australia's involvement in World War II brought cultural changes and closer ties with the United States. The United States set up naval bases in Australia, which hosted over 150 000 US soldiers. This US presence influenced Australian fashion, music, technology and customs.

FIGURE 4 Word War I diggers are often associated with the concept of mateship due to the close bonds they formed under extraordinary circumstances.

By 1944, almost two-thirds of Australian imports came from the United States. The United States soon became a stronger cultural influence on Australia than Britain.

Twentieth-century wars led to waves of new migrants to Australia. Each major conflict brought different groups seeking a new home. Immigration, however, was restricted by the controversial White Australia policy, making it hard for non-Europeans to settle. This policy was relaxed after World War II and abolished in 1973. **TABLE 2** summarises the relationship between global conflicts and immigration patterns.

TABLE 2 Flows of migrants to Australia associated with world conflicts

Conflict	Origin of migrants
World War II	Europe
Vietnam War	Vietnam, Cambodia
Cold War	USSR: Russia, Ukraine, Baltic states
Various African civil conflicts	South Africa, Sudan, Somalia
Gaza–Israel conflict	Palestine

The early twenty-first century influenced Australian identity through global events. In 2001, the September 11 terrorist attacks in the United States led to strict anti-terror laws and a sense of fear in Australia. The 2002 Bali bombings, killing 88 Australians, and the 2014 Lindt Café siege in Sydney, which resulted in three deaths, contributed to societal tension. Recently, racially motivated crimes have added to this climate. Governments must manage these crises carefully to ensure safety without inflaming racial tensions.

Australia's relationship with Asia has grown, influencing our national identity. Asian immigration began during the gold rushes and has intensified due to economic ties with China, India, South Korea and Japan. As of September 2024, 1 million international students, mainly from Asia, attended Australian universities. Asian cultural influences are visible in cities through fashion, music and trends.

19.3 SkillBuilder activity INVESTIGATING CONTEMPORARY CIVICS AND CITIZENSHIP ISSUES

Your task is to research the history of a significant person in your life. You may choose to work with a partner or investigate the history of someone close to you, such as a family member, caregiver, mentor or other important person.

By developing interview questions and then conducting an interview with an older individual, you will gain a better understanding of their heritage and what their identity means to them and to the people close to them.

1. Your first step is to develop your interview questions. The best way to write an interview question is to think carefully about what you want to discover. A basic list of questions could include:
   - **Where** do the significant people in your life come from? What is their national identity?
   - **Who** were the first people in your life to migrate to Australia, and why did they come here?
   - **When** did the significant people in your life arrive in Australia, and how did they get here?
   - **What** was life like when they first arrived in Australia?
   - **How** did they demonstrate their identity then, and how do they demonstrate it now?

   If the person you're interviewing has Aboriginal and Torres Strait Islander heritage, you could ask questions such as:
   - What language group do you belong to? Where are the traditional lands of your people?
   - Does anyone from your community still live there? Why or why not?
   - You can also add your own questions to these lists.
2. Once you have written your questions, organise an appropriate time to conduct your interview. Be sure to either record the interview or write comprehensive notes during the interview to capture all the details shared.

3. Once you have completed your interview, you will need to **present** your findings to the class. The format you choose for this presentation is up to you. You can create a poster, Google Slide/PowerPoint or another form of multimedia presentation.
   Your presentation should provide a summary of your interview and should focus on the topic of Australian identity.

19.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 4	2, 5, 6, 7	8, 9, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following statement is True or False.
   Upon their arrival in Australia, European settlers assumed that Aboriginal and Torres Strait Islander cultures were foreign and complicated.
2. **Explain** how the first inhabitants of Australia arrived here.
3. **Identify** the percentage of Aboriginal and Torres Strait Islander Peoples who had died after 20 years of European settlement in Australia.
   A. 10 per cent
   B. 30 per cent
   C. 60 per cent
   D. 90 per cent
4. **Identify** which of the following was an impact of British settlement of Australia.
   A. Interest in British sport, literature, music and customs
   B. Australia's involvement in World War I
   C. Development of the Australian accent
   D. All of the above
5. **Explain** why it was difficult for non-European migrants to enter Australia during the mid-twentieth century.

ANALYSE AND APPLY

6. a. **Identify** the country you believe has had the biggest impact on Australia's national identity.
   b. **Justify** your decision.
7. **Analyse** how Australia's involvement in World War II led to a closer relationship with the United States of America.

EVALUATE AND COMMUNICATE

8. Aboriginal and Torres Strait Islander cultures have a strong connection to natural environments. **Discuss** how this connection can be seen in Australian culture today.
9. **Suggest** evidence of British cultural influence that still exists in Australia today.
10. **Consider** how the concept of mateship applies to modern Australians.

Answers and sample responses for this topic are available online.

LESSON 19.4 What are the different perspectives on national identity in Australia?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the differing representations of Australian identity and why these can be complex.

Tune in

Though debates can be formal and public events, often they are just a discussion between people in which they express different opinions about something.

1. **Think of an issue about which there can be multiple sides to the debate. Briefly discuss this issue and the arguments of the opposing sides with a partner.**
2. **Which side of the debate do you believe and why?**
3. **Discuss whether you believe this debate (or similar issues) needs to have a clear outcome.**

FIGURE 1 Debating involves sharing of differing perspectives.

Unfortunately, some perspectives on culture and identity are built on false assumptions and incorrect cultural stereotypes. Later in this lesson, we will use two case studies to investigate differing perspectives on national identity in Australia. Before discussing these case studies, it is important to learn about how stereotypes can impact these perspectives and, in turn, social cohesion.

19.4.1 Representations of social groups in Australian media

Stereotypes exist due to the way social groups are represented in the media. Our perceptions of these groups are heavily influenced by what we watch on television and read in newspapers and on social media. So influential are these sources of information that they can often override our existing knowledge of social groups. Several reports have highlighted how ageism and negative representations of older people still occur in Australian media.

CASE STUDY

A 2024 report by the Australian Human Rights Commission on how the Australian media reports on ageing and older persons highlighted recurring themes of:

- the framing of ageing as a problem
- a prevailing narrative of decline, frailty and vulnerability in older age
- intergenerational conflict
- gendered ageism
- invisibility of older Australians and their lived experiences.

Source: https://humanrights.gov.au/sites/default/files/2024-09/Shaping_Perceptions_Full_Report%202024.pdf

SkillBuilder discussion

Investigating contemporary Civics and Citizenship issues

1. Read the Case Study from the Australian Human Rights Commission. How have you heard or seen older people portrayed in the media?
2. Would you agree that ageism exists? Are other social groups stereotyped?

Stereotypes can have a significant impact in societies regardless of the way that they are created or perpetuated. Most stereotypes have negative connotations and are based on only a small part of a social group's identity. By accepting a stereotype, we limit ourselves from developing a true understanding of different cultures. We exaggerate cultural and religious differences and forget the similarities we may share. In this way, stereotypes can undermine cohesion in Australian society.

19.4.2 Asylum seekers and refugees

The second verse of 'Advance Australia Fair', Australia's national anthem, is not as commonly sung as the first verse during many public events, including school assemblies and sporting events. Most performances of the anthem focus on the first verse, which is shorter and more widely recognised. However, the second verse of the anthem is still part of the official lyrics and contains significant meaning.

> *For those who come across the seas, we've boundless plains to share*,
>
> *With courage let us all combine to Advance Australia Fair*

This lyric directly relates to welcoming migrants into our society — an issue that has a mixed history in our country. In modern Australia, we like to think that our communities are tolerant and welcoming — and for the most part, they are. However, the treatment of **asylum seekers** and **refugees** in Australia continues to cause debate. Australia accepted nearly 15 000 refugees in 2023. To put this number into perspective, it represents only 1.03 per cent of the total number of refugees who were resettled globally. An asylum seeker is someone who is claiming refugee status but whose official status has yet to be confirmed. Until recent years, there were also thousands of asylum seekers who were classified as 'irregular arrivals'. These people attempted to enter Australia via unofficial methods, most commonly by boat. In recent years, the attitudes of both governments and regular Australians to refugees has been extremely different to the way asylum seekers are treated.

FIGURE 2 Protesters in Brisbane objecting to the treatment of asylum seekers

While they respect an individual's right to seek refuge, they want that person to do so through official channels. There are many people and organisations in our society that protest against the way these people are treated, arguing that it may not always be possible for an asylum seeker to pursue assistance through the official channels.

19.4.3 Flagging a change?

The design of the Australian flag has been widely debated, especially in recent years. The current flag, selected from a competition in 1901, includes the Union Jack, Southern Cross and a seven-pointed star representing Australia's states and territories. Critics argue that the Union Jack is outdated since Australia

is no longer under British control and its presence is a painful reminder of colonisation for Aboriginal and Torres Strait Islander Peoples.

The inclusion of the Southern Cross also sparks discussion. Although familiar to European settlers and having some significance to Aboriginal and Torres Strait Islander Peoples, it has negative connotations due to associations with far-right groups. Historians highlight its problematic use by racist elements, suggesting careful consideration in choosing symbols for a national emblem. Many believe the flag should be updated to reflect Australia's diverse identity.

19.4 SkillBuilder activity COMMUNICATING

There are lots of incorrect assumptions and perceptions of refugees and asylum seekers in Australia. Your task is to communicate the facts of the issue to other Year 8 students.

1. **Conduct** research on five areas regarding refugees and asylum seekers. Areas to focus on could include:
   - why they have fled their countries
   - their average age, gender and situation (single, family, occupation, etc.)
   - how they travel to Australia
   - what they have with them when they arrive
   - what processes and conditions they face when they arrive in Australia
   - how long they are detained.

   You could use the **Refugee Council of Australia**, **Red Cross** or **Asylum Seeker Resource Centre** weblinks in your research.
2. **Create** a fact sheet about this topic. A fact sheet should be free of opinion and should focus on statistics and factual information.

Remember your audience (Year 8 students) and your purpose (to inform).

19.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5, 6	3, 4, 7	8, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** three factors that can influence someone's perspective on national identity.
2. **Identify** how stereotypes are created and perpetuated.
   A. Through the media
   B. Personal experiences
   C. Cultural trends
   D. All of the above
3. **Explain** the difference between a refugee and an asylum seeker.
4. Approximately _____ refugees are resettled in Australia each year.
5. The Australian flag was designed to celebrate:
   A. Federation.
   B. the arrival of the First Fleet.
   C. the 1967 referendum.
   D. the 1956 Olympic Games.

ANALYSE AND APPLY

6. **Explain** how symbols like the Australian flag or national anthem contribute to shaping Australia's national identity.
7. **Describe** how Australia's different cultural groups, including Aboriginal and Torres Strait Islander Peoples, contribute to the country's national identity.

EVALUATE AND COMMUNICATE

8. **Propose** a way in which negative stereotypes could be changed to better reflect true cultural traditions, values and practices.
9. **Explain** whether you believe refugees and asylum seekers are treated differently by the Australian government. **Discuss** whether this difference is justified.
10. **Create** a new version of the Australian flag. Ensure that your design appropriately reflects Australia's diverse national identity. Include a written explanation of the features/symbols/colours which you have chosen to include.

Answers and sample responses for this topic are available online.

LESSON 19.5 Inquiry: What is the future of Australia Day?

LEARNING INTENTION

By the end of this lesson, you should be able to **describe** the debate about Australia Day.

Background

The debate that surrounds the celebration of Australia Day provides another example of the complex nature of Australian national identity. Australia Day (currently celebrated on 26 January) is the official national day of Australia. This date commemorates the arrival of the First Fleet at Port Jackson, New South Wales, in 1788. The first evidence of Australia Day celebrations comes from colonial New South Wales. Referring to it as 'Foundation Day', Governor Lachlan Macquarie issued the first official observance of the date in 1818 — the thirtieth anniversary of the founding of the colony. Prior to 1888, the individual colonies celebrated their respective commemorative events on separate days. It was not until 1935 that all Australian states and territories officially adopted the term 'Australia Day' and it was only as recently as 1994 that the date was marked by a national public holiday.

The celebration of this day is far from straightforward — even before we start to discuss what a national day to celebrate the arrival of the British signifies to Aboriginal and Torres Strait Islander Peoples.

In modern Australia, our national day is celebrated in many different ways. Barbeques, concerts, community events and citizenship ceremonies are held on Australia Day across the country. Some people argue that Australia Day is the perfect opportunity to reflect on what makes our country unique and what it means to be Australian. But to many other Australians, there is nothing about 26 January that deserves to be celebrated.

FIGURE 1 Invasion Day protesters call for a change of date.

To many Australians, this date is a reminder of the beginning of a difficult time in our history. Celebrating Australia's official national day on the anniversary of European colonisation can be seen as deeply disrespectful to Aboriginal and Torres Strait Islander Peoples and their cultural heritage. The first official protests against Australia Day celebrations occurred in 1938 with the National Day of Mourning. This event was heavily publicised and is seen by many historians as the beginning of the civil rights movement. Day of Mourning protests have been held ever since, with more recent events using the names Invasion Day or Survival Day. In recent years, there have been calls to change the date of Australia Day. People calling for this change are not against celebrating an Australian national day. Instead, they want to celebrate Australian culture and identity on a date that has a more positive meaning for all Australians.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task, you can use this rubric to self-assess.

Inquiry steps

Your task is to choose a new date to host Australia's national day. You need to **create** and **communicate** a presentation to your class which explains the rationale behind your choice. Use the following scaffold to help you investigate the issue further and to help you create your presentation.

Step 1: Questioning and researching

The basis of the issue has been provided for you, but now it's up to you to find out more. Start by **listing** potential new dates and their significance to Australian history.

Step 2: Analysis, evaluation and interpretation

What are you looking for in a new date for Australia Day? What do you think would unite Australians behind your choice? Why is one potential new date better than another?

Step 3: Civic participation and decision-making

Having researched and analysed the issue, now comes the time to make your own decision. Which date provides the best reflection of Australian society?

Step 4: Communicating

Now it's time to put it all together.

Select a line of argument and stick to it. Be clear and concise with your reasoning. Make sure that you include evidence to support your decision.

LESSON 19.6 Review

19.6.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

19.2 What does national identity mean in a globalised world?

- Due to Australia's diverse cultural composition, a singular national identity is difficult to isolate.
- With improvements in transportation and information communication technology, the world has become a smaller place — a process known as globalisation.
- Globalisation has facilitated the movement of people and ideas, creating a blend of cultural identities within many countries, including Australia.
- National identities have become more similar in the modern world.
- Citizens of countries have responsibilities to their own countries but also to the global community.

19.3 How has Australia's identity been shaped?

- Australian national identity has evolved over time, beginning with Aboriginal and Torres Strait Islander Peoples over 65 000 years ago.
- Changes to Australian national identity have mirrored the country's immigration history and also our changing regional relationships and alliances.

19.4 What are the different perspectives on national identity in Australia?

- People have differing perspectives on national identity and what it means to be Australian. These perspectives are sometimes built on false assumptions and incorrect cultural stereotypes.
- Symbols (such as the Australian national flag) and issues (such as Australia's attitude towards refugees and asylum seekers) can often reflect the way cultural identity is felt and represented by different cultural groups within Australian society.

19.5 Inquiry: What is the future of Australia Day?

- The date currently used to celebrate Australia Day is problematic, largely because of the significance of that date in the history of Aboriginal and Torres Strait Islander Peoples.

19.6.2 Key terms

asylum seeker a person whose request for sanctuary has yet to be processed
cultural homogenisation the diversity of unique national identities is being replaced by a uniform identity for all
cultural tokenism when demonstrations of national identity lose meaning, becoming token gestures or novelties
decimate to kill, destroy or remove a large proportion of something
global citizenship being aware of the interconnectedness of the globalised world and acting in a way that promotes this notion
globalisation the process of interacting with markets in other countries around the world, as part of an integrated global economic system
marginalisation treatment of a group of people which relegates them to the fringes of society
pluralism the recognition and affirmation of diversity within a political body, which is seen to permit the peaceful coexistence of different interests, convictions and lifestyles
refugee a person who has been forced to leave their country in order to escape war, persecution or natural disaster
stereotype widely held but oversimplified idea of a type of person or thing
terra nullius ('land belonging to no-one') in Australia, the legal idea that since no-one was 'using' the land when the first Europeans arrived, it could be claimed by the British Crown

19.6.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview:

How is Australia's democratic and cohesive society maintained?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry question, outlining your views.

learnon

Post-test	Online Post-test
eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary

19.6 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 6, 9, 10, 14	3, 4, 5, 7, 8, 13	11, 12, 15

REMEMBER AND UNDERSTAND

1. Identify which of the following is not a benefit of globalisation.
   A. Faster international travel times
   B. More effective communication channels
   C. Increased environmental damage
   D. Global transference of ideas and information
2. Globalisation has made a country's national identity:
   A. easier to identify.
   B. harder to identify.
   C. more similar to that of other countries.
   D. all of the above.
3. What is best definition of cultural homogenisation?
   A. When all countries have the same national identity
   B. When some countries have similar parts of their national identity compared to others
   C. When all countries have unique national identities
   D. When some countries have no identifiable national identity
4. Determine what effect cultural tokenism can have on the meaning of traditions and customs.
   A. It can make them better and easier to see.
   B. It can lessen the meaning of these traditions and customs.
   C. It has equal positive and negative effects.
   D. It has no impact at all.

5. All of the following are rights and responsibilities of Australian citizens except to:
   A. follow and obey the law.
   B. defend Australia if necessary.
   C. respect the rights and liberties of Australian citizens.
   D. give everyone a 'fair go'.
6. The impact of _____ had the biggest impact on the evolution of Australian national identity.
   A. European settlement
   B. post-war immigration
   C. the White Australia policy
   D. Aboriginal and Torres Strait Islander cultures
7. Changes in Australian national identity have followed:
   A. waves of cultural trends.
   B. waves of immigration.
   C. waves of global conflicts.
   D. waves of economic relationships.
8. Identify the region that has had the biggest recent impact on Australian national identity.
   A. South-East Asia
   B. Sub-Saharan Africa
   C. Western Europe
   D. North America
9. Most stereotypes are:
   A. accurate and constructive.
   B. true and helpful.
   C. negative and hurtful.
   D. neither positive nor negative.
10. Asylum seekers are people whose refugee status has:
   A. been ignored.
   B. been denied.
   C. been approved.
   D. not been decided.

ANALYSE AND APPLY

11. **Explain** what you think should be the higher priority for Australians — to act as Australian citizens or as global citizens?
12. **Create** a timeline that documents important changes in Australia's immigration history and their impacts on national identity.

EVALUATE AND COMMUNICATE

13. **Evaluate** the impact of globalisation on Australian national identity. **Explain** whether globalisation has had an overall positive or negative impact on the evolution of our identity.
14. After reading the section on Halloween and cultural homogenisation, **discuss** whether Australians should continue to celebrate this event. **Justify** your stance.
15. **Suggest** ways in which cultural tokenism can be avoided.

Answers and sample responses for this topic are available online.

20 Economics and Business concepts and skills

LESSON SEQUENCE

20.1 Overview 584
20.2 Economics and Business concepts and skills 586
20.3 SkillBuilder: Investigating ..... online only
20.4 SkillBuilder: Interpreting and analysing data and information ..... online only
20.5 SkillBuilder: Evaluating, concluding and decision-making ..... online only
20.6 SkillBuilder: Communicating ..... online only
20.7 Review 593

LESSON 20.1 Overview

INQUIRY QUESTION

Why does Australia have a taxation system and why should individuals plan to achieve financial goals?

Have you ever wondered why topics of conversation amongst adults can often spill into talk about taxes and budgeting? Why is the news reporting house prices again and why are we discussing finance? Remember, economics is all around us; it's the study of how people and businesses make choices about using resources. Whether you're buying lunch, saving your allowance or even just surfing the internet, you're participating in the economy. Understanding economics helps us make better decisions about how to use our money and resources wisely. In Year 8, you'll explore how Australia's taxation system works and learn why planning is crucial for achieving financial goals.

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Pre-test
Online pre-test

eWorkbook
Customisable worksheets for this topic

Digital document
Key terms glossary

Video eLesson
Economics and Business concepts and skills

SkillBuilder

Use our SkillBuilder activities to get instant feedback on the Economics and Business concepts and skills of:

- **INVESTIGATING**
- **INTERPRETING AND ANALYSING DATA AND INFORMATION**
- **EVALUATING, CONCLUDING AND DECISION-MAKING**
- **COMMUNICATING**

LESSON 20.2 Economics and Business concepts and skills

LEARNING INTENTION

By the end of this lesson, you should be able to **explain** the economics and business concepts and skills.

20.2.1 The world of economics and business

Economics and business is about understanding how people use resources and make decisions. Economics looks at how goods and services are produced, distributed and consumed. It explores concepts like supply and demand, prices and how markets work. Business focuses on how companies operate, make profits and provide goods and services. It includes topics like marketing, management and finance. Together, economics and business help us understand how the economy functions and how businesses contribute to society. This knowledge is useful for making informed decisions in everyday life and for future careers. There are five key concepts that underpin your study in Economics and Business. These are shown in **TABLE 1**.

TABLE 1 The five key concepts in Economics and Business help make sense of the world.

	Topic	Explanation
1	**Understanding work and business**	Learn about how businesses work in Australia, what affects their decisions and why entrepreneurship is important.
2	**Resource allocation and decision-making**	Understand how resources are used, what opportunity cost is and how economic decisions are made. Apply these ideas to the economy of businesses, work and being a smart consumer.
3	**Being an active participant**	Know why it's important to be involved in the economy by working, running a business, being financially smart and making informed decisions.
4	**Key issues in Australia**	Appreciate the main economic and business issues in Australia and understand how Australia interacts with the global economy, especially Asia.
5	**Reasoning and problem-solving**	Develop skills to apply economic and business concepts to real-world issues, solve problems and make economic decisions.

Understanding work and business

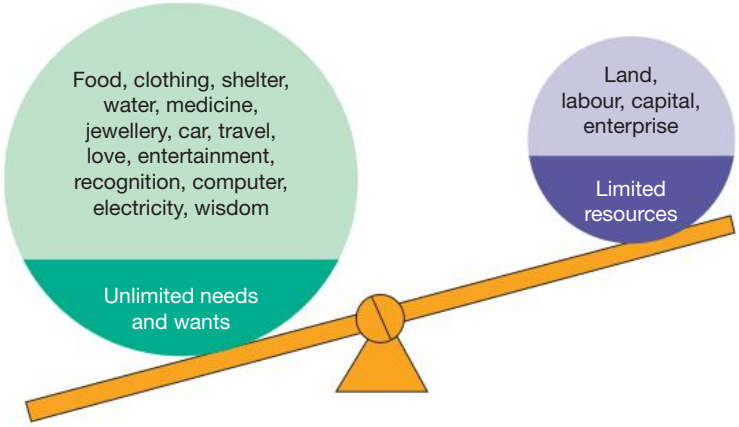
Australia hosts a variety of jobs and businesses, supporting the economy by offering goods, services and employment. People work for money, skills and societal contributions. **Entrepreneurs** drive innovation with new ventures and ideas. Aboriginal and Torres Strait Islander Peoples have significantly impacted Australia's workforce and business sector. Understanding these aspects highlights the economy's function and opportunities in Australia.

Resource allocation and decision-making

Economic scarcity is the concept of people having unlimited **needs** and **wants**, but only having limited resources available to satisfy them. As individuals, nations and as a planet, we only have a certain amount of resources available to us. We call this the basic economic problem. It has always existed, in all world economies.

Needs are items that people must have in order to survive, such as food, water and clothing. Wants are a wish or desire for something that will make life more enjoyable for a person, and are not necessary for survival. In order to make good choices with their available resources, people must know the difference between needs and wants.

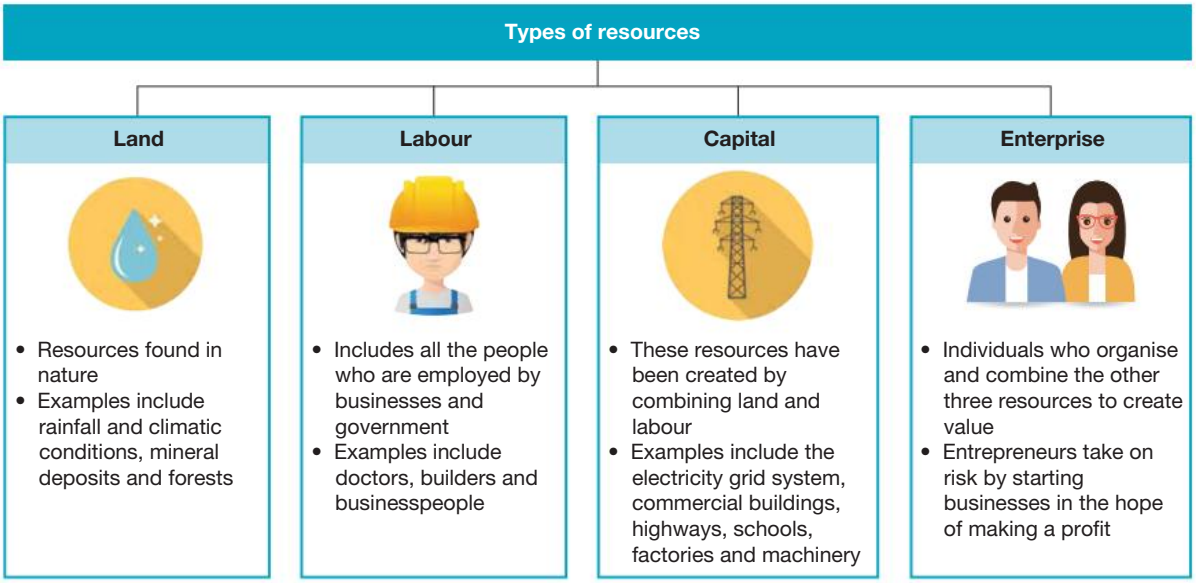
FIGURE 1 The basic economic problem is scarcity, where we have unlimited needs and wants, but limited resources to satisfy them all — this creates an imbalance.



However, the difference between a need and a want is sometimes not clear. Generally, most of us would say that needs include shelter, health care and access to good hygiene facilities. You might say that a car, computer, internet and mobile phone are wants. However, many people would suggest that these are needs.

To satisfy our needs and wants, businesses use resources to produce goods and services. There are four main types of economic resources: land, labour, capital and enterprise. These types of resources can be seen in **FIGURE 2**.

FIGURE 2 There are four main types of economic resources: land, labour, capital and enterprise.



To produce goods and services, resources usually need to be combined. For example, to bake a loaf of sourdough bread, we need flour, water and salt (land resources), an oven (capital resource) and a baker (labour resource). Unfortunately, as we have seen, the resources available to us are limited. We can only produce a certain amount of goods and services from these resources. We are not able to satisfy the unlimited needs and wants of society. Because of economic scarcity, we must choose some things, which means giving up other things.

Opportunity cost

In economics, opportunity cost refers to what you give up when making a choice due to scarcity. It represents the sacrifice made when choosing one option over another. Every decision involves an opportunity cost.

For example, Ayesha can buy either a new book or a pair of earrings, but not both. She chooses the book, and the opportunity cost is the earrings she did not purchase.

Consumers, businesses and governments all consider opportunity cost in their decisions. Consumers make choices about purchases, work and leisure. Businesses decide what products to produce and how to meet customer needs. Governments determine how to manage society and the economy effectively.

All economies must allocate scarce resources to satisfy endless needs and wants. This process, called resource allocation, addresses the basic economic problem through an established economic system.

SkillBuilder discussion

Communicating

1. Mind-map with a partner some of the opportunity costs that you or someone you know may have faced in the last week.
2. Discuss how these decisions can be complicated.
3. Why do people have to make a 'trade-off'? Can you explain this in economic terms?

FIGURE 3 The cost of buying a video game is not just the price paid, but also the opportunity cost of not being able to spend the money on something else.

An economic system is the way we organise the production and distribution of our goods and services. All economic systems must answer three basic economic questions:

- What to produce
- How to produce
- For whom to produce

For example, a farmer must decide what to grow on her available land. Does she grow apples or avocados? Then she must decide how to produce the crops. Does she grow organic crops, use high-tech machinery or hire workers to harvest the fruit? And who will she sell her fruit to? A supermarket chain, direct to consumers at a farmers' market or to cafes and restaurants?

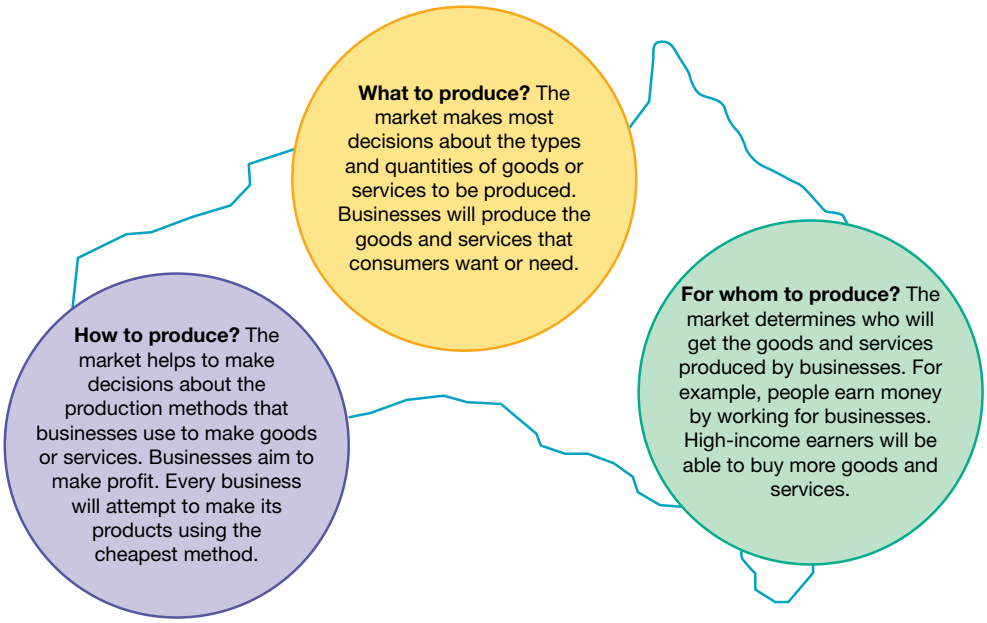
These questions are summarised in **FIGURE 4**.

SkillBuilder discussion

Investigating

1. Think of and list some of the weird and wonderful things that you can buy.
2. How do you think businesses decide on what to produce?
3. Do you think that there are products that shouldn't be produced at all? What might these be?

FIGURE 4 Australia's economic system answers the three economic questions through the market.



Being an active participant

Being an active participant in the economy involves more than just having employment or managing a business. It includes making informed decisions that affect both individual financial well-being and the wider economic context. Employment, business operations and everyday financial choices and planning all play a role in maintaining the stability and growth of the economy.

Active participation can be seen through various roles: as an employee contributing labour and skills; as a business owner fostering innovation and job creation; and as a consumer whose spending patterns shape market trends. Financial literacy is essential in these roles, as it enables informed decision-making and an understanding of the implications of those decisions.

Key issues in Australia

Australia faces several important economic and business issues that impact our daily lives. One key issue is the complexity of the tax system. Navigating through various tax obligations can be challenging for individuals and businesses, and understanding tax regulations is essential for compliance and financial planning. Simplifying the tax system and providing clear guidance can help improve financial literacy and ease the burden on taxpayers.

Another significant issue is financial goal setting and management. Setting realistic financial goals, such as saving for retirement, purchasing a home or investing in education, requires careful planning and discipline. Financial literacy programs and resources can empower individuals to create and stick to their financial plans, thereby improving their financial well-being and contributing to overall economic stability.

Additionally, income inequality remains a pressing concern. Addressing disparities in income distribution is crucial for fostering social cohesion and ensuring that economic growth benefits all Australians. Policies aimed at improving access to education, healthcare and affordable housing can help reduce inequality and support a more inclusive economy.

Reasoning and problem-solving

The development of reasoning and problem-solving skills is an essential component of education. These skills are crucial for you to be able to navigate complex economic situations, make informed business and consumer decisions, and tackle any challenges effectively.

Reasoning skills involve the ability to think logically, evaluate evidence and draw sound conclusions.

Problem-solving skills focus on identifying issues, generating potential solutions and implementing effective strategies to solve problems.

TABLE 2 The four Economics and Business skills that you will develop in Year 8.

Category	Skills
Investigating	Develop and apply questions to investigate contemporary economic, business, work or financial issues and systems; locate, select and organise relevant data and information from a range of sources
Interpreting and analysing data and information	Construct, interpret and draw conclusions from graphs, models and text to identify and describe economic and business issues, trends and cause-and-effect relationships; analyse and verify sources of data and information
Evaluating, concluding and decision-making	Analyse a response to an economic, business, work or financial issue, identifying potential costs and benefits
Communicating	Create and present descriptions and explanations, using subject-specific knowledge and terminology, with reference to sources

20.2.2 SkillBuilders in the topic

In addition to the broad skills that you have been introduced to, you will learn a range of essential practical skills as you study Economics and Business. The SkillBuilder lessons in this topic tell you about the skill, show you how to apply the skill and let you practise the skill with tasks related to the topics covered in this subject.

20.2 Exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 7, 9	2, 3, 5, 8	4, 6, 10

REMEMBER AND UNDERSTAND

1. What is the primary reason resources are considered limited in economics?
   A. They are evenly distributed among all countries.
   B. They can be used for multiple purposes simultaneously.
   C. They are finite and cannot meet all human wants.
   D. They are renewable and always available.
2. Which of the following best defines 'opportunity cost'?
   A. The monetary cost of a good or service
   B. The time taken to make a decision
   C. The value of the next best alternative foregone
   D. The total cost of all alternatives
3. Entrepreneurship is important in an economy because it:
   A. discourages competition.
   B. reduces the need for innovation.
   C. drives economic growth and job creation.
   D. eliminates the role of government in business.
4. Businesses typically respond to changes in consumer preferences by:
   A. maintaining their current product lines.
   B. reducing production to cut costs.
   C. adapting products and services to meet new demands.
   D. increasing prices to deter demand.
5. Australia's interaction with the global economy, especially Asia, is significant because:
   A. it leads to isolation from other markets.
   B. it limits opportunities for local businesses.
   C. it enhances trade relationships and economic growth.
   D. it reduces the need for domestic production.

ANALYSE AND APPLY

6. **Define** 'resource allocation' and explain why it is a fundamental concept in economics.
7. Give an example of when a consumer has to make a choice. Why is this called an opportunity cost?
8. **List** two factors that can influence a business's decision-making process.
9. **Explain** how being financially smart can benefit an individual in the long term.
10. **Discuss** one way in which Australia's engagement with Asian economies can impact local businesses.

Answers and sample responses for this topic are available online.

LESSON 20.3 SkillBuilder: Investigating

online only

While studying Economics and Business, you will develop and use a range of questions to form the basis of an investigation. In this lesson you will investigate the taxation system in Australia.

LESSON 20.4 SkillBuilder: Interpreting and analysing data and information

online only

Interpreting and analysing data and information involves identifying the main features or ideas. Graphs are commonly used in Business and Economics. In this lesson you will learn how to interpret one.

LESSON 20.5 SkillBuilder: Evaluating, concluding and decision-making

online only

Evaluating means to propose explanations for events or issues and to make overall judgements based on the evidence. In this lesson you will complete a cost benefit analysis to effectively evaluate a business opportunity.

LESSON 20.6 SkillBuilder: Communicating

online only

Communicating involves presenting your findings or information using an appropriate format to suit a particular audience. In this lesson, you will pitch for a new product or business idea.

LESSON 20.7 Review

20.7.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

20.2 Economics and Business concepts and skills

- Resource allocation and decision-making involves the idea of 'scarcity'. Scarcity is the 'basic economic problem', and this involves society having limited resources available to satisfy unlimited needs and wants.
- The four main types of economic resources are land, labour, capital and enterprise.
- Every choice made involves an opportunity cost, which is the next best alternative given up whenever a choice is made.
- All economies must make decisions about how resources will be allocated among producers and what types of goods and services will be produced. This means economies must answer the three economic questions: what to produce? How to produce? And for whom to produce?
- Australia is a market capitalist economy, which means that most answers to the three economic questions are made by the market (where buyers and sellers negotiate prices for goods and services).
- The four Economics and Business skills that you will develop throughout your course are:
  - *Questioning and researching:* This involves posing statements that require answers, particularly in regard to what is known and what is not known, in order to improve your knowledge. Research is important because it allows you to find out what is unknown and contributes to filling in gaps in our knowledge.
  - *Interpreting and analysing:* This involves interpreting information to identify the main features or ideas, and then examining the information closely to determine how the parts relate to the whole.
  - *Evaluating, concluding and decision-making:* This involves proposing explanations for events or issues and making overall judgements based on the evidence.
  - *Communicating:* This involves presenting findings or representing information using an appropriate format to suit a particular audience. The appropriate use of economics terminology and business terminology is very important in this.

20.7.2 Key terms

allocate assign resources to different uses within the economy
business any activity conducted by an individual or individuals to produce and sell goods and services to make a profit
economic scarcity the economic problem of having unlimited needs and wants, but limited resources to satisfy them
economic system a way of organising the production and distribution of the nation's goods, services and incomes
economics a social science (study of human behaviour) that analyses the decisions made by individuals, businesses and governments about how limited resources are used to satisfy society's unlimited needs and wants
economy a system established to determine what to produce, how to produce and to whom production will be distributed
entrepreneur a person who sets up a business or businesses, taking on financial risks in the hope of profit
financial literacy the ability to make informed judgements and to take effective decisions regarding the use and management of money
market the place where goods, services or resources are exchanged between buyers and sellers
market capitalist economy an economic system that relies on the market to allocate resources based on the actions of consumers and producers, and where resources are generally owned by private individuals and businesses

needs goods or services that consumers consider necessary to maintain their standard of living
opportunity cost the next best alternative given up whenever a choice is made
resource allocation relates to decisions about how scarce resources are distributed among producers, and which types of goods and services will be produced to satisfy wants and needs
wants goods or services that are desired in order to provide satisfaction to the user, but which are not necessary for survival or to meet the basic standard of living in a community

20.7.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview.

Why does Australia have a taxation system and why should individuals plan to achieve financial goals?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response the inquiry question outlining your views.

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Post-test	Online post-test
eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary

20.7 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
3, 5, 6, 7, 14	1, 2, 8, 9, 11	4, 10, 12, 13, 15

REMEMBER AND UNDERSTAND

1. From the following, identify an essential aspect of investigating economic trends.
   A. Ignoring outliers in data
   B. Collecting relevant data from multiple sources
   C. Using anecdotal evidence
   D. Relying solely on historical data
2. When interpreting a line graph, select the most important factor you need to identify to answer a question.
   A. The colours used in the graph
   B. The scale of the vertical axis
   C. The titles of the graph
   D. The patterns and trends in the data
3. Identify what analysing data enables you to do.
   A. Ignore the implications
   B. Understand the underlying trends in the information
   C. Avoid making decisions
   D. Focus on irrelevant details

4. Identify which of the following is a key component of evaluating economic information.
   A. Making decisions without considering alternatives
   B. Using personal bias
   C. Considering how valid and reliable the data is
   D. Ignoring external factors
5. Why is concluding is an important step in economic analysis?
   A. It helps to summarise the findings and implications.
   B. It ignores the data collected.
   C. It creates confusion.
   D. All of the above
6. Identify which of the following best describes decision-making in economics.
   A. Ignoring all alternatives
   B. Analysing the advantages and disadvantages of different options
   C. Making random choices
   D. Relying on your gut feeling
7. Identify a crucial aspect of communicating economic findings.
   A. Using information that contains complicated key terms
   B. Presenting data clearly and concisely
   C. Hiding complicated information
   D. Making unsupported claims
8. Identify the most effective method for interpreting economic data.
   A. Ignoring context
   B. Considering historical and current trends
   C. Relying on assumptions
   D. Focusing only on numerical data
9. How should conclusions be drawn from economic data?
   A. Based on personal opinions
   B. By analysing the data thoroughly
   C. Through random guesses
   D. Without considering data accuracy
10. What is the purpose of evaluating economic data?
   A. To summarise the overall findings
   B. To assess the reliability and validity of the data
   C. To try to understand the reasons for something
   D. All of the above

ANALYSE AND APPLY

11. **Describe** how businesses can use different types of information to make decisions about their products or services.
12. **Explain** how businesses can manage risks and plan for future growth.
13. **Explain** how changes in the economy, such as shifts in demand or technological advancements, affect business strategies.

EVALUATE AND COMMUNICATE

14. **Explain** why it is important for individuals to have a plan for managing their finances.
15. **Discuss** how the government can affect the decisions we make as individuals in society.

Answers and sample responses for this topic are available online.

LESSON 20.3 SkillBuilder: Investigating online only

LEARNING INTENTION

By the end of this SkillBuilder you should be able to **develop and apply** questions to investigate contemporary economic, business, work or financial issues and system.

20.3.1 Tell me

While studying Economics and Business, you will develop and use a range of questions to form the basis of an investigation.

The following steps are a useful guide to the process of writing questions to form the basis of an investigation.

- Develop a series of specific questions that will help guide your research in the appropriate direction, and help you determine the information you need.
- Locate appropriate sources of that information.
- Record relevant information from a range of sources.
- Present the information in an appropriate form.

20.3.2 Show me

Imagine you have been presented with the following information on tax rates during 2024–25.

Resident tax rates 2024–25

Taxable income	Tax on this income
0–$18 200	Nil
$18 201–$45 000	16c for each $1 over $18 200
$45 001–$135 000	$4288 plus 30c for each $1 over $45 000
$135 001–$190 000	$31288 plus 37c for each $1 over $135 000
$190 001 and over	$51 638 plus 45c for each $1 over $190 000

Your first step is to create a list of questions that you have about this information. You may be wondering about the following:

1. What are the tax rates now?
2. Does everyone pay tax at these rates?
3. Why do I need to pay tax?

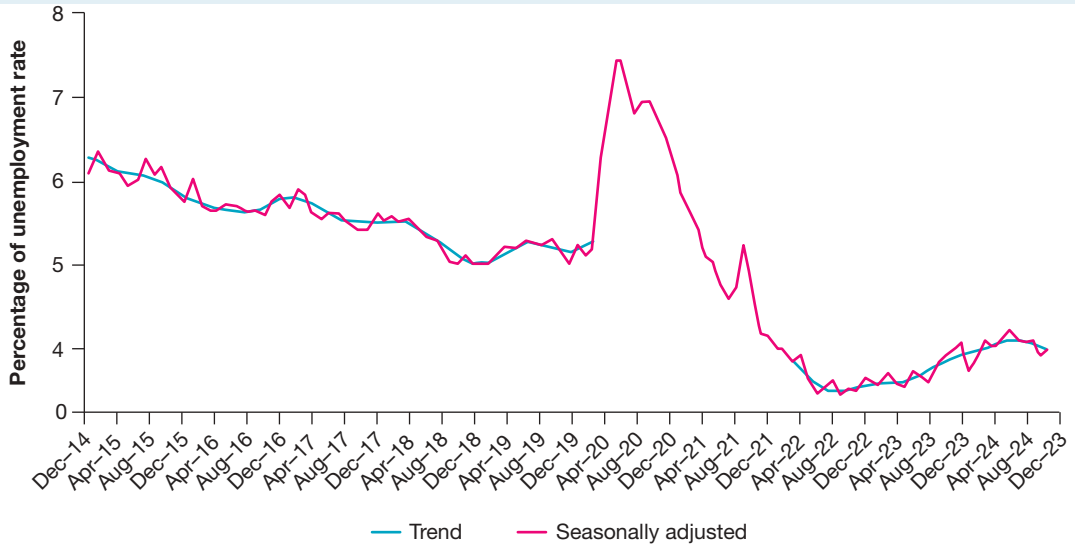
You can then start to think about how you might answer these questions.

- The Australian Tax Office website is a very good place to start.
- You may also visit other government or current affairs websites for more information and even opinions.
- You can then think about how to present the information in an appropriate form.

20.3.3 Let me do it

Using the process in section 20.3.2 as a model, devise a series of questions and carry out the research to produce a report on the following key question:

FIGURE 1 Unemployment for a 10-year period in Australia



20.3 SkillBuilder activity **Communicating**

Prepare a short information session on income tax in Australia. Your information should include but not be limited to what income tax is, why it is paid by employees, what rates it is paid at and finally whether you think it is fair.

LESSON 20.4 SkillBuilder: Interpreting and analysing data and information online only

LEARNING INTENTION

By the end of this SkillBuilder you should be able to interpret and explain a graph.

20.4.1 Tell me

Interpreting and analysing data and information is another skill that you will develop while studying economics and business. This skill involves studying information to identify the main features or ideas. You may also be able to determine how the parts relate to the whole. One way in which you might analyse data and information is by interpreting information in a graph.

20.4.2 Show me

Line graphs are very useful for showing trends (patterns of change over time) and comparing data. When analysing a line graph, first examine the heading — what does it tell you about the data contained in the graph? Next, examine the key, which identifies what each of the lines on the graph represents. Then look closely at the vertical and horizontal axes, which show you the variables as numbers, percentages, years, and so on.

When reading the lines on a graph, you should be able to see an overall picture of what is happening; that is, whether a particular variable has increased, decreased or remained steady over time. Examine these lines closely — what changes do you see? If change has occurred over time, has it been steady

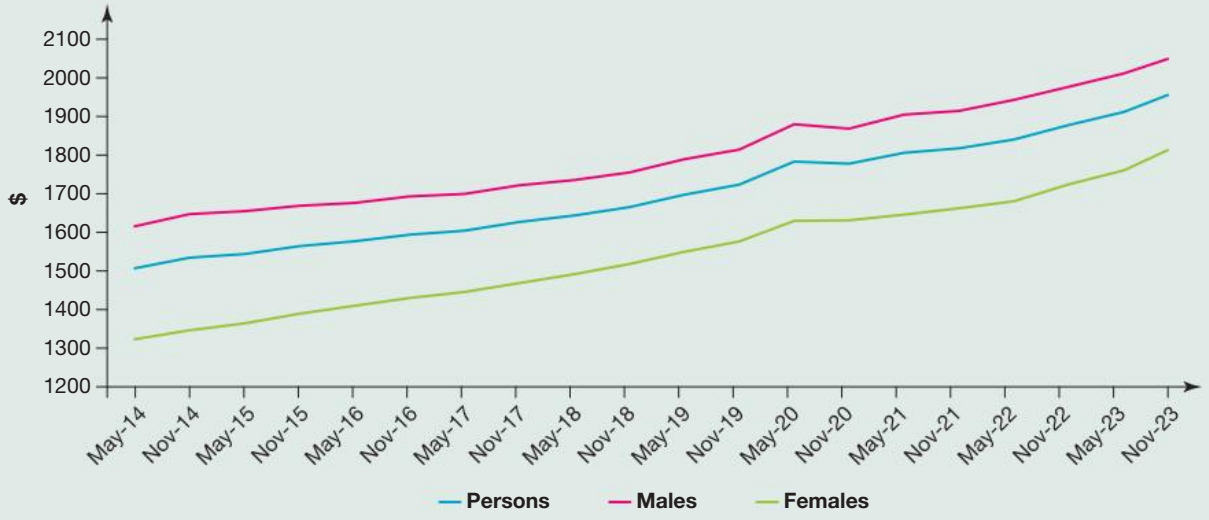
and gradual, or sudden and erratic? When examining a line graph, note any patterns that you identify. You will then be ready to complete your interpretation, which involves writing a paragraph to summarise the information you have found in your analysis.

20.4.3 Let me do it

Complete the following activity to practise the skill

20.4 SkillBuilder Activity

Analyse and interpret the following graph. Use what you have learned about the line graph (vertical axis and horizontal axis and variables) to analyse what the graph tells you. Write a paragraph describing the trends shown.



LESSON 20.5 SkillBuilder: Evaluating, concluding and decision making

online only

LEARNING INTENTION

By the end of this lesson you will be able to use a cost–benefit analysis to effectively **evaluate** a business opportunity.

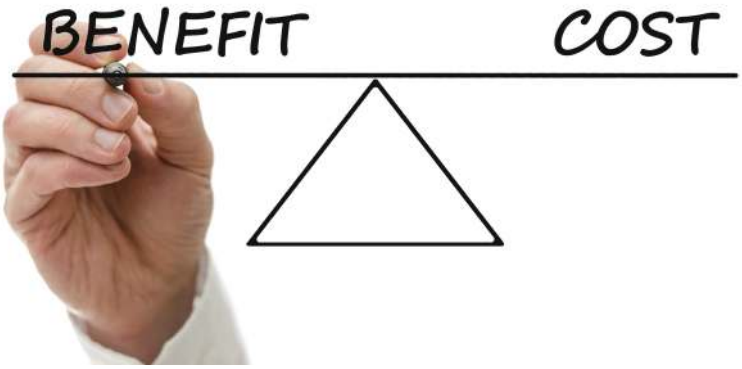
20.5.1 Tell me

Evaluating means to propose explanations for events or issues and to make overall judgements based on the evidence. This is a skill that you might develop in Economics and Business by looking at the benefits or advantages of something and then examining its costs or disadvantages.

A cost–benefit analysis is a detailed examination of the strengths and weaknesses of different alternatives in order to see whether the benefits outweigh the costs.

The principle behind a cost–benefit analysis is that you should only decide to act on an alternative if the benefit from taking it is greater than the cost.

FIGURE 1 A cost–benefit analysis involves weighing up the pros and cons of a decision. You are doing it every day without even realising. Can you think of any examples?



A cost–benefit analysis helps to determine if an option will be a good decision or investment. It is also useful for comparing alternatives or projects, as well as estimating the resources needed to complete the alternative or project.

A good cost–benefit analysis:

- identifies opportunities
- calculates the costs and benefits
- compares the costs and benefits to determine if the benefits outweigh the costs
- makes a decision about the best alternative to recommend.

20.5.2 Show me

Cost-benefit analysis of saving $10 per week

Costs

- Reduced immediate spending power: saving $10 per week means you will have $10 less to spend on immediate needs or wants.
- Opportunity cost: the money saved could have been used for other investments or to purchase goods or services that could provide immediate satisfaction or utility.

Benefits

- Accumulated savings: over a year, saving $10 per week will result in a total saving of $520.
- Interest earnings: if the saved amount is deposited in an interest-bearing account, it could earn additional money over time.
- Financial security: having savings can provide a safety net for unexpected expenses or financial emergencies.
- Future investment: accumulated savings can be used to invest in opportunities that might yield higher returns.
- Goal achievement: regular savings can help in achieving long-term financial goals such as buying a house, funding education, or planning a vacation.

Overall, given the benefits, you may decide to save half of the allocated money per week so that you strike a balance between spending and saving. 20.5.3 Let me do it

20.5 ACTIVITY

You can now carry out this process to complete a cost–benefit analysis using the case study. Complete the activities that follow to practise this skill.

CASE STUDY: Uncle Bill's

You have been asked by a friend who has their own catering business whether they should start to offer a delivery service. The business makes cakes and sandwiches, and serves workers in a busy city location.

1. Complete a cost–benefit analysis of this idea — you may need to do some extra research to establish whether your cost–benefit analysis is accurate.
2. Offer advice to your friend as to what they should do. You will need to write this as a recommendation and base it on evidence.

Make sure you can present your analysis in an appropriate format.

LESSON 20.6 SkillBuilder: Communicating

LEARNING INTENTION

By the end of this lesson you will be able to prepare, research, structure and write a pitch for a new product or business idea.

20.6.1 Tell me

When you use the skill of communicating and reflecting in Economics and Business, you will be presenting your findings or information using an appropriate format to suit a particular audience. You will also need to use terminology that is used by economists and businesspeople. For example, when writing a case study on a business, you would be expected to use business terminology and write as if your audience are people who are interested in studying businesses.

A pitch is a speech or presentation given by a prospective business owner, whereby they attempt to persuade an audience (often a group of investors) to see that their idea for a product or a business is a good one. With a good pitch, the business owner would hope that the investors would choose to invest in the new product or business idea.

20.6.2 Show me

Elements of a good business pitch

A good business pitch:

- has an introductory statement that will grab attention
- clearly defines the problem the business owner is solving
- explains what the new product is or what the business idea is about
- outlines why the new product/business idea is unique and/or better than the competition
- is easy to understand
- is well-presented.

FIGURE 1 A business pitch is sometimes called an 'elevator pitch' because the listener should be able to understand the idea or concept in a short amount of time.

CASE STUDY: Inventing self-service machines

The man who invented the self-service checkout system, Dr Howard Schneider, was laughed at when he first pitched his machine to a supermarket chain in the 1980s. Back then, the idea of replacing humans with an object seemed ridiculous. Today, we can see how much the world has changed.

The use of self-checkout systems is steadily increasing in Australia, even though some shoppers find them frustrating and difficult to use. Messages about unexpected items in the bagging area or the inability to locate pomegranates in the fruit category can lead to frustration and irritability and thus also customer dissatisfaction. Other people love the new invention because it provides convenience when they just 'pop in' for a few items.

However, the machines are yet to provide a complete win for the stores, because they must still 'staff' the self-checkout areas to provide help with working the systems and in order to combat theft. Nevertheless, newer modules are already being built with increased scanning accuracy.

20.6.3 Let me do it

20.6 ACTIVITY

Have a go at writing your own pitch for a new product or business idea. Your task is to plan a unique business using the parameters provided below and then prepare a business pitch. You will be able to work by yourself or with a group. Your teacher will determine the maximum and minimum group sizes.

Your first step is to develop a new product or business idea. Some suggestions are:

- a new style of shoe incorporating state-of-the-art technology
- a healthy snack-food option
- a new technology for creating energy
- a new type of home service
- a unique social media website or app.

Use the following points to guide your preparation for your pitch:

- the name of the new product or the name of the business and what products it will sell
  - business logo
- description of what the business will do
- type of business ownership
- location of business
- target market information — who your customer is and why they need your new product or business
- a list and explanation of the qualities you possess and that your partner(s) may possess that will make your new product or business a success
- what your competitive advantage is.

The pitch should be delivered as a written report but could also be given as an oral presentation.

21 Understanding tax and consumer literacy

LESSON SEQUENCE

21.1 Overview 598
21.2 Our role in the economy 600
21.3 The role of the government in the economy 604
21.4 The Australian taxation system 610
21.5 Inquiry: How would you tax the Australian public? 615
21.6 Consumer and financial literacy 616
21.7 Review 621

LESSON 21.1 Overview

INQUIRY QUESTION

What is your role within the economy, what do you need to know and who can help?

The Australian economy is the total of all activities undertaken for the purpose of producing, distributing and consuming the goods and services we require to satisfy our needs and wants.

As young consumers, our interactions with the economy become more frequent and more serious as we age. In the near future, conversations will turn to work, our future and therefore our rights and responsibilities. Our first step is likely to be work experience through school or a part-time job. In all our dealings with the Australian economy, we want to be treated fairly when dealing with businesses and we want to know our rights. It is important to understand the role of the government in our working lives, including the role of the Australian Taxation Office (ATO), MyGov, Medicare, Consumer Affairs Victoria and other organisations that protect consumers and impose obligations upon us.

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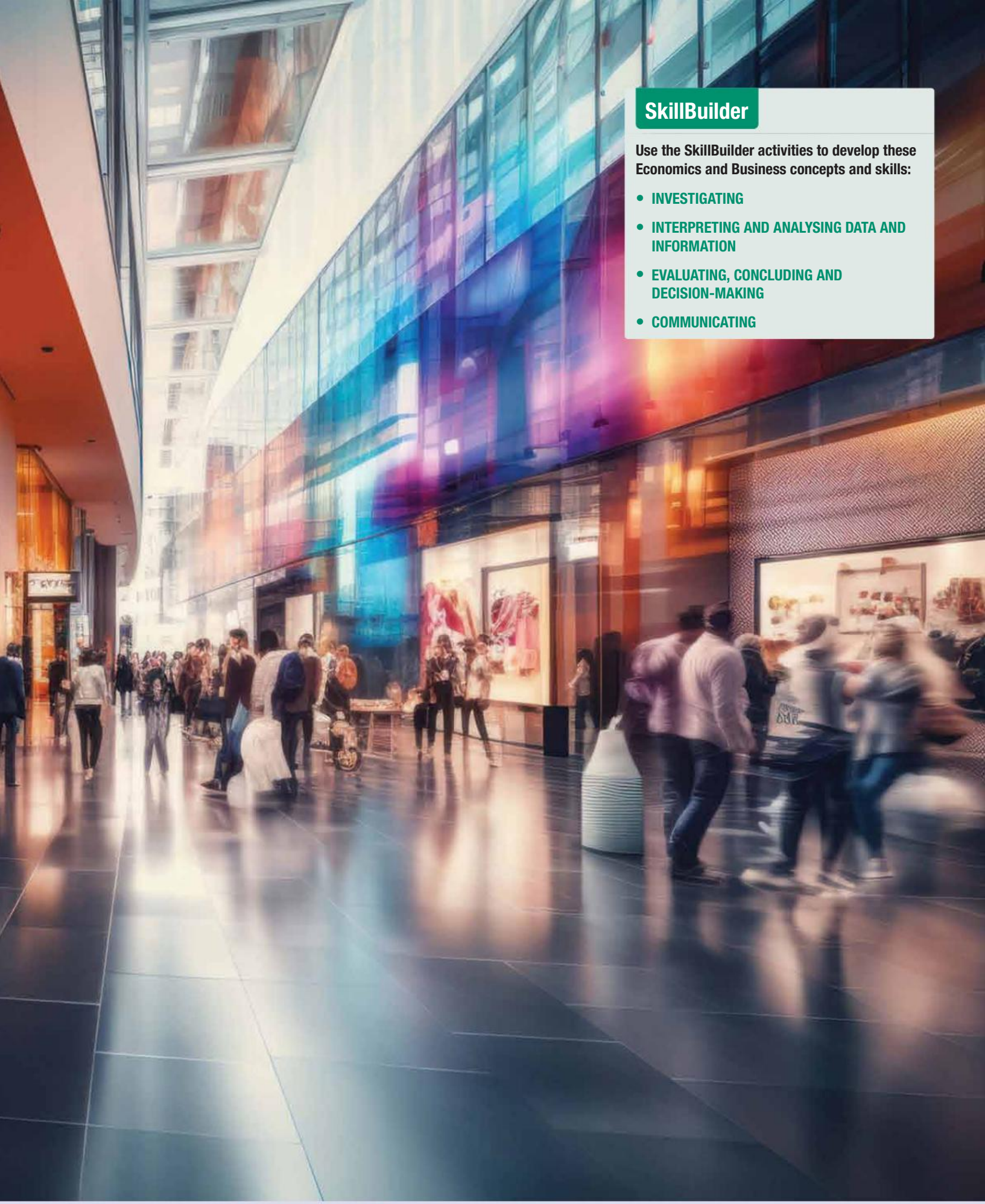
Pre-test
Online pre-test

eWorkbook
Customisable worksheets for this topic

Digital documents
Key terms glossary

Video eLesson
Development of the market economy



SkillBuilder

Use the SkillBuilder activities to develop these Economics and Business concepts and skills:

- INVESTIGATING
- INTERPRETING AND ANALYSING DATA AND INFORMATION
- EVALUATING, CONCLUDING AND DECISION-MAKING
- COMMUNICATING

LESSON 21.2 Our role in the economy

LEARNING INTENTION

By the end of this lesson you should be able to **explain** your role in the economy.

Tune in

Imagine you have just watched your older sibling buy their first car, weeks after their 18th birthday. You start to consider what you will do when your time comes. Discuss the following:

1. **How much do you think a car will cost when you turn 18?**
2. **How will you raise the money for your first car?**
3. **What is the best type of bank account to open to save your money in?**
4. **How will you know the best place to borrow money if you need to?**

FIGURE 1 How much money will I need?

21.2.1 The importance of understanding our role in the economy

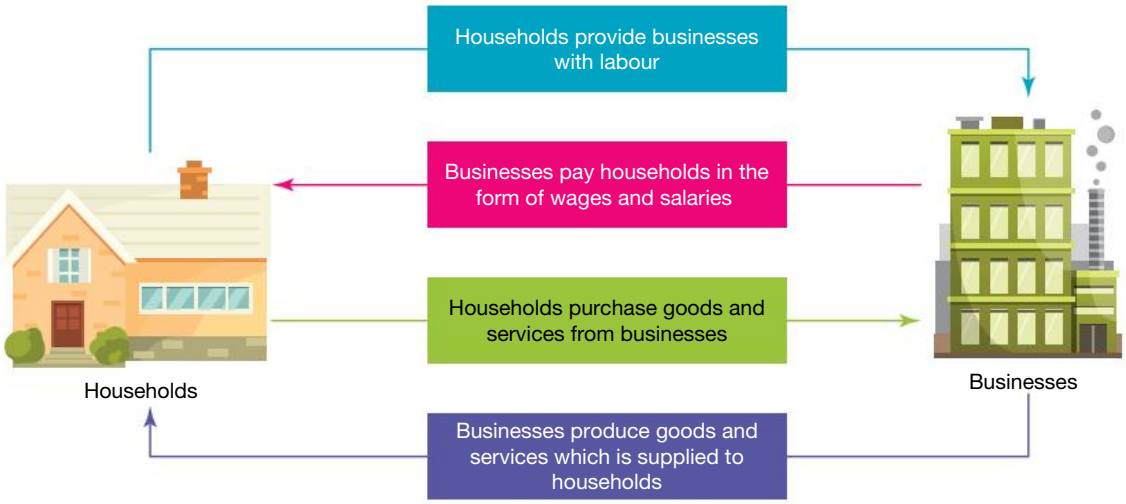
Consumers and producers are at the centre of Australia's market system. All of us are consumers, as we all buy things. While we may obtain the money to buy things from our parents or caregivers we are still considered consumers, and this makes us part of the **household sector**.

The businesses we buy from comprise the business sector.

We can examine the relationship between the business sector and the household sector by looking at **FIGURE 3**. It shows the flow of goods and services, and the flow of money between households and businesses. It also demonstrates how **labour** is exchanged for money, and how that money is used to purchase goods and services. This tells us about the financial relationship between consumers and producers in our market system.

FIGURE 2 One of our roles in the economy is to be a consumer, a buyer of goods and services.

FIGURE 3 Model showing the flow of money, goods and services between households and businesses.



SkillBuilder discussion

Interpreting and analysing data and information

1. Study the diagram in **FIGURE 3**. What are 'households'?
2. Explain how households rely on businesses.
3. Explain how businesses rely on households.

The decisions made by the household sector in terms of what goods and services they purchase informs the business sector what goods and services to produce. Knowing what goods and services to produce determines which limited resources are allocated to the production of goods and services.

21.2.2 The financial sector

Some of us receive pocket money (or an allowance from our parents or caregivers), some of us receive money in return for the work we do, and some of us receive both. As a young person, you may be told 'don't spend it all at once'. This is where savings come in. While most people of your age don't save much, many of us in the economy do put aside some of our income as savings. This money is usually deposited in a bank or similar **financial institution**.

SkillBuilder discussion

Communicating

1. Are you a saver or are you a spender?
2. How much do you save each month?
3. Would you like to be able to save more money?

How might you do this?

FIGURE 4 The Commonwealth Bank is one of the largest Australian banks.

Banks and other financial institutions receive deposits and use this money to lend out to others who need to borrow money. In return for the money deposited in banks and financial institutions, we receive **interest**. This interest adds to our savings and if we are saving up to buy something, such as a car, we want to find a savings account that will provide a good return or rate of interest).

These financial institutions make up what we sometimes call the *financial sector* of the economy.

Banks and other financial institutions also play an important role in providing credit for households. When consumers make large purchases, such as a house or a car, it is usually easier to borrow the money to pay for these than to save up for years to pay cash for them. When purchasing a house or land, most people take out a **mortgage loan**. This enables them to borrow to pay for the property and pay back the loan over a relatively long period of time. The housing market depends on the amount of money available for mortgage loans. If more people are able to buy houses, more new houses are built, creating more jobs in the construction industry.

21.2.3 The overseas sector

While we may not realise it, as well as being part of the household sector and interacting with the business and financial sectors, we also interact with the overseas sector. Australia is an open economy, which means we trade goods and services with other countries. Australian businesses **export** goods and services to both consumers and producers in other countries. Australian consumers buy many products that have been manufactured in other parts of the world and **imported** into this country. As a consumer, it is highly likely that you have purchased goods made overseas; you are an importer!

FIGURE 5 Australia imports from and exports to many other countries.

The reasons why you may be an importer are varied:

- There are some products that we are unable to produce with the same efficiency as can be achieved in other countries. A lot of the highly sophisticated machinery used in factories is imported, helping the factories to produce goods more cheaply.
- Imported goods are sometimes cheaper than locally produced goods, which can make it difficult for local producers to compete with overseas producers.
- Imported goods may be of a superior quality and we value quality over price in some circumstances.

21.2 SkillBuilder activity INVESTIGATING

Trade is an important part of our lives and an important component of the economy. When we consider trade, we likely have ideas about who we trade with and what we trade. Remember, much of Australia's trade takes place with overseas countries.

1. **Conduct** a survey of the class, asking students to write down:
   a. the top 5 countries we export (sell) to
   b. the top 5 countries we import (buy) from
   c. the top 5 items we export (sell)
   d. the top 5 items we import (buy).
2. Go to the Department of Foreign Affairs and Trade's website. Locate actual data regarding Australia's trade.
3. **Compare** your survey results with the actual results and write a short report **summarising** your findings.

21.2 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 6	2, 4, 5, 7	8, 9, 10

REMEMBER AND UNDERSTAND

1. **Determine** whether the following is True or False. A person can be both a producer and a consumer.
2. **Determine** whether the following is True or False. Taxes are considered a leakage from our economic system.
3. **Define** the following terms:
   a. market
   b. labour
   c. household sector.
4. **Outline** the importance of the overseas sector.
5. **Outline** how the financial sector can influence markets.

ANALYSE AND APPLY

6. **Explain** how it is possible for a person to be both a producer and a consumer.
7. **Explain** the difference between imports and exports.

EVALUATE AND COMMUNICATE

8. **Predict** the impact that each of the following might have on the level of goods and services sold by Australian businesses.
   a. Households decide to save a larger proportion of their income.
   b. Financial institutions make it easier for consumers to acquire credit cards.
   c. There is a large increase in the availability of cheaper imported goods.
9. Consumers and producers are linked. **Explain** this relationship.
10. Exports and imports involve the overseas sector and trade. **Explain** why Australia needs to trade.

Answers and sample responses for this topic are available online.

LESSON 21.3 The role of the government in the economy

LEARNING INTENTION

By the end of this lesson you should be able to **describe** the different roles played by the government in the economy.

Tune in

We have probably all heard of some or all of the following government agencies:

- Reserve Bank of Australia (RBA)
- Australia Taxation Office (ATO)
- Medicare
- Centrelink.

They are official government bodies that assist consumers and businesses to manage their interaction in the economy.

1. **Mind-map what you think are the main functions of each of these institutions.**
2. **Discuss why we need these institutions.**

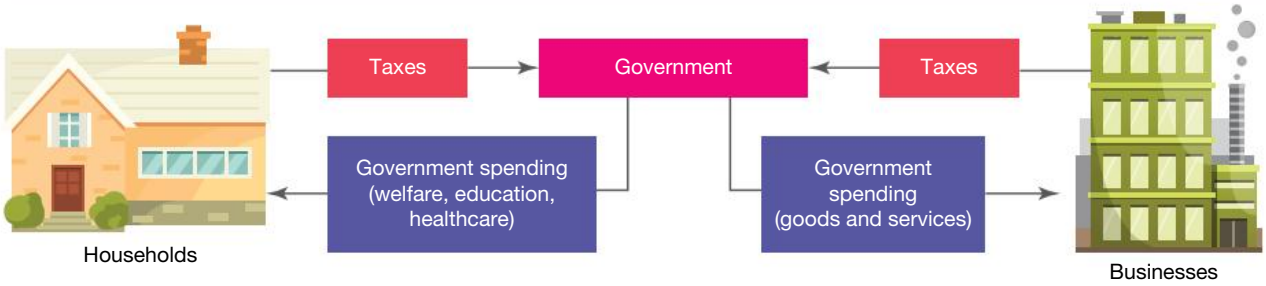
FIGURE 1 Centrelink and Medicare are two important Australian government agencies.

21.3.1 Role of the government

The involvement of government in our market system is illustrated by **FIGURE 2**. We can see that both households and businesses pay **taxes** to government.

Some of this money comes back to households in the form of welfare payments such as pensions, or as services such as education and healthcare. Some of it is spent on buying goods and services from businesses, or paying businesses to build roads, schools or hospitals.

FIGURE 2 Model showing the role of the government in the flow of money, goods and services between households and businesses



SkillBuilder discussion

Investigating

1. Study the diagram in **FIGURE 2**. Discuss the role of the government.
2. Why is the government placed in the centre of the diagram, between the businesses and households?
3. What is the link between taxes and government spending?

21.3.2 Welfare

The government provides financial and other support to disadvantaged members of the community. The age pension supports those who are beyond retirement age and no longer working. **Unemployment benefits** are designed to support those who cannot find work. The National Disability Insurance Scheme (NDIS) provides people with a permanent and significant disability with money to access support and services.

FIGURE 3 Welfare payments help those who are not able to earn an income.

Not only are welfare payments designed to provide fairness and support to those who need help, but the payments can also have a positive economic effect on markets. Those receiving welfare are likely to spend most of their money, so their spending adds to the circular flow of income throughout the economy. Businesses gain revenue from selling additional goods and services. This, in turn, allows them to employ more people, who also spend their money buying goods and services.

21.3.3 Provision of infrastructure

The government is responsible for providing **infrastructure** like roads, railways and ports. These are crucial for transporting goods from manufacturers to shops.

- Ports are needed for importing and exporting goods and moving them within Australia. Tasmania relies on shipping across Bass Strait to receive goods from the mainland and to send its products to other states.
- The government provides a postal service that supports correspondence between businesses, as well as the delivery of goods through a parcel delivery service.
- The telephone service was originally provided by government before Telstra was **privatised** and other providers were allowed to enter the market for telephone services. Even today, the national broadband network is an important infrastructure project being funded by the government. Markets cannot operate without efficient systems of communication between consumers and businesses.
- Traditionally, energy supplies such as electricity and gas have also been provided by government. These are not only essential for the domestic uses we are all accustomed to, but also for the functioning of businesses. In some states of Australia, electricity and gas supplies have been privatised and are now run by businesses rather than by the government. Even where this has occurred, the original infrastructure was usually built by the government before being sold to the business sector.

SkillBuilder discussion

Privatisation

1. What problems might occur when essential industries, such as electricity and gas supplies are privatised?
2. Do you think these essential businesses should be private or government owned?

FIGURE 4 Government provides infrastructure to enable markets to function more efficiently.

21.3.4 Economic management

The government is responsible for ensuring that Australia's economy grows to meet the needs of its population. It can stimulate growth by spending on infrastructure like schools and roads, which creates jobs. These workers earn income and spend it locally, supporting businesses and encouraging the supply of goods and services.

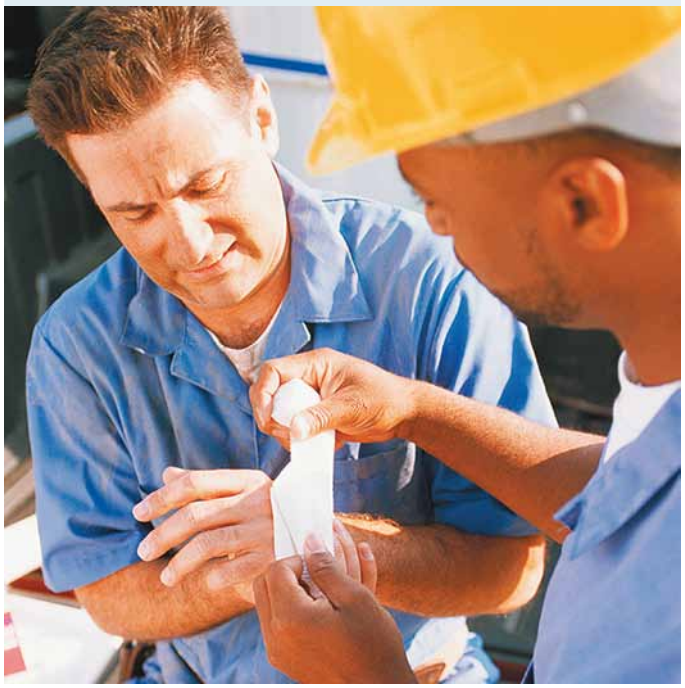
Governments plan their spending in a yearly **budget**. The budget tries to keep our economy in a stable position, keeping a balance between supporting growth and avoiding the negative impacts of it.

21.3.5 Wages and employee relations

We know that there is a market for labour in which workers offer their skills and experience for sale to businesses and businesses buy that labour by paying wages and salaries. In order to ensure that the labour market functions fairly, it is regulated by laws passed by governments. The major law dealing with wages and working conditions in Australia is the *Fair Work Act*, a federal government law.

State governments provide regulations to ensure safe workplaces through occupational health and safety laws. Both federal and state governments have also sought to prevent discrimination in the workplace by passing laws that support equal employment opportunity. These make it illegal to discriminate against someone in any workplace on the basis of gender, race, age or ethnicity. Victoria also has laws to deal with bullying in the workplace.

FIGURE 5 Occupational health and safety laws are designed to prevent injuries at work.



21.3.6 Provision of goods and services

Governments often supply goods and services, such as education and healthcare. While private entities also offer these services, it is generally seen as the government's duty to ensure access for all. Additionally, state governments are responsible for ambulance, firefighting, emergency services and public transport. Since public transport isn't profitable, it relies on government funding to remain affordable.

FIGURE 6 It is a responsibility of governments to provide hospitals and health services.

SkillBuilder discussion

Investigating

1. Now that you have a sense of what the government does, discuss how important the government is. Do we need a government to provide us with goods and services?
2. Do you know of any countries where the government doesn't provide goods and services? Or do you know of any countries where the government provides most things?

21.3.7 Planning and the environment

State governments and local councils have powers to control the type of buildings and other developments that are built within their borders. Governments establish building standards to ensure that all buildings are structurally sound, and not likely to fall down or cause a hazard in any other way. Anyone wishing to build a house or other structure on vacant land must gain building approval. This is to ensure that the building conforms with certain standards. Councils and the state government can also determine whether or not a particular type of building is appropriate in a particular area. For example, it would usually be considered inappropriate to build a large factory in the middle of a residential area.

FIGURE 7 Governments have introduced laws to prevent businesses from polluting the environment.

Since the early 1970s, state governments have also introduced laws to protect the environment. These place restrictions on both businesses and individuals in relation to what they can release into the atmosphere and waterways. These laws can affect markets because they can increase costs for some businesses. For example, businesses that may once have released waste material into a creek, river or drain now have to dispose of it in an environmentally responsible manner. Smoke and fumes have to be properly filtered before being released into the atmosphere. Motor vehicles have emission controls to limit the levels of harmful chemicals in exhaust fumes.

Environmental laws have also created new business opportunities, with waste management and recycling businesses providing services for a variety of different customers. As with most government involvement in the economy, while some businesses may appear to be disadvantaged, opportunities are often created for new and different businesses to grow.

21.3.8 International trade policies

Governments regulate imports and exports through customs and quarantine laws, affecting various markets. Until 2011, Australia banned New Zealand apples to prevent the spread of fire blight, a contagious disease that impacts the apple market.

Governments have also protected local industries by imposing **tariffs** on similar imported goods. For instance, in the early 1980s, a 28 per cent tariff on imported clothing made it more expensive than Australian-made products, encouraging local purchases. Over the next 30 years, this tariff was reduced, making imported clothing cheaper than locally produced items.

FIGURE 8 A reduction in tariffs has increased the quantity of imported clothing sold in Australia.

As a result of reduced tariffs, many local clothing manufacturers have been unable to compete with cheaper imported clothing and consequently have had to close. A similar program of tariff reduction occurred in the motor vehicle industry. While this has had a negative impact on the Australian clothing and motor vehicle industries, the positive impact for Australian consumers is clothing and motor vehicles being much cheaper. Since the 1980s, Australian governments have also negotiated trade agreements with other countries. We agree to reduce tariffs on imports from those countries, and in return they agree to reduce tariffs on goods they import from us. Although this can make it difficult for some local manufacturers who have to compete against cheaper imported products, it can be good for our export industries and for consumers, who pay lower prices.

21.3.9 Immigration policies

Governments control goods entering and leaving Australia and regulate immigration. Immigration boosts population growth faster than natural birth rates, providing more consumers and adding to the workforce with new skills. By encouraging migration in specific industries that need skilled workers, governments influence labour markets. Additionally, Australia's tertiary education benefits from international students, who contribute financially through tuition fees.

FIGURE 9 Australia has become a major provider of tertiary education for fee-paying students from Asian countries.

21.3 SkillBuilder activity INTERPRETING AND ANALYSING DATA AND INFORMATION

Use the **Australian Bureau of Statistics** (ABS) weblink in the Resources panel to complete the following tasks.

a. **Find** out the current estimated population of Australia.
b. **Explain** how this estimate is calculated.
c. **Select** two headlines or media releases and, for each one, **describe**:
   i. three significant facts or figures included in the report
   ii. the trends or changes that have occurred in recent years in the facts or figures reported.

21.3 Exercise

learn on

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 4	3, 5, 6, 7	8, 9, 10

REMEMBER AND UNDERSTAND

1. **Explain** what the following acronyms stand for.
   a. ATO
   b. RBA
   c. ABS
2. **Match** the terms with their definitions by adding the correct number to the column on the left.

Infrastructure	1. An increase in the size of a country's economy, and levels of production, over a period of time
Economic growth	2. When the government announces its spending and taxation plans
Government budget	3. Large-scale building projects including roads, railways and public spaces

3. **Identify** what tariffs are.
   A. A tax on goods imported into the country from overseas
   B. A general rise in prices across all sectors of the economy
   C. Goods and services purchased by local consumers from overseas businesses
   D. Those things that contribute to the production process
4. **Recall** what happens when a service provided by the government is privatised.
   A. Governments gain the majority of their influence over how this service is run.
   B. The private company loses the majority of their influence over how this service is run.
   C. Governments lose the majority of their influence over how this service is run.
   D. None of the above
5. **Explain** why the government usually must provide funding for public transport to operate.

ANALYSE AND APPLY

6. **Explain** how a government budget can influence economic growth.
7. **Identify** two goods or services that the government supplies.
8. **Explain** why the government is involved in the setting of wages and working conditions of employees.
9. **Identify** two ways in which environmental laws might affect a business.
10. Governments welcome skilled migrants into Australia. **Explain** how this might increase the growth of our economy.

Answers and sample responses for this topic are available online.

LESSON 21.4 The Australian taxation system

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the Australian taxation system and how taxation revenue is used.

Tune in

Paying taxes isn't necessarily the most rewarding thing about working, but our taxation system does have many benefits for our society.

1. **Mind map reasons why taxes are important in our economy.**
2. **Develop a list of services and/or products we may not have if there were no taxes to be paid.**

FIGURE 1 The phrase 'in this world, nothing is certain except death and taxes' signifies that it is inescapable that we will all be required to pay taxes.

21.4.1 Australia's system of taxation

Tax is a term used to describe a compulsory financial charge or some other type of levy imposed on an individual, household or business by a government body in order to fund government spending. In Australia, taxation is primarily monitored by the Australian Taxation Office.

The Australian government and the individual state and territory governments impose a variety of taxes on individuals, households and businesses.

Our tax system can be looked at in a variety of ways.

Direct and indirect taxation

Direct taxation refers to any tax that falls directly on the taxpayer — for example, income tax, company tax, licence fees. The tax is levied on the income of the individual or business and paid directly by the business.

Indirect taxation refers to any tax that is passed on to other tax payers — for example, Goods and Services Tax (GST), sales taxes, import duties. GST is paid by businesses but is passed on to consumers who pay the tax when they buy goods or services. The businesses (sellers) then collect it and pass the tax on to the ATO.

Rate of taxation

The tax brackets used by the Australian Taxation Office give us a guide as to how we are taxed on our own wages or salaries. Table 1 shows the taxable income 'brackets' and then how much, in dollars and cents, a person will pay in tax on this income.

Australia uses a **progressive tax** system, which means that people who earn more money pay a higher percentage of their income in tax. This helps make the system fair, so that those who can afford to pay more do so.

In contrast, a proportional tax system is when everyone pays the same percentage of their income, no matter how much they earn. A regressive tax is the opposite of progressive: it takes a larger percentage of income from people who earn less, which can make it harder for low-income earners. Progressive taxes aim to reduce inequality by helping fund services like healthcare, education, and transport for everyone.

SkillBuilder discussion

Interpreting and analysing data and information

1. Study the information in **TABLE 1**. What taxable income bracket do you think most people are in?
2. What happens to the rate of tax that you pay as you earn more?
3. Given everything that you know so far, do you think that the tax system is fair?

TABLE 1 The tax brackets used by the ATO

Resident tax rates 2024–25	
Taxable income	**Tax on this income**
0–$18 200	Nil
$18 201–$45 000	16c for each $1 over $18 200
$45 001–$135 000	$4288 plus 30c for each $1 over $45 000
$135 001–$190 000	$31 288 plus 37c for each $1 over $135 000
$190 001 and over	$51 638 plus 45c for each $1 over $190 000

Source: https://www.superguide.com.au/how-super-works/income-tax-rates-brackets

21.4.2 The purpose of Australia's system of taxation

The main aim of the Australian government's taxation policy is to improve the fairness of the distribution of income among individuals and households. The government has three main roles in imposing taxes on individuals, households and businesses — distribution, allocation and production.

Distribution

The distribution of income is a government goal. It tries to reduce the gap between the rich and the poor by taxing high-income earners more than low-income earners and redistributing some of that income. The government will then use this collected taxation to redistribute income to low-income earners or those without any income through transfer payments (welfare, such as the JobSeeker Payment).

Allocation and production

The system of taxation adopted by the government can also be used to allocate resources. In a way this means redistributing resources in society to make it more equitable for everyone. The government uses the income that it receives to spend on the provision of goods and services which are sometimes not produced by businesses.

FIGURE 2 Taxes are used for resources such as emergency services.

These services are available to all and are often free or provided at a very low cost. These services include public parks, street lighting, police and emergency services, defence and other such services.

The government can influence consumer behaviour through the tax system. Rebates, such as the Victorian government's Solar Homes Program, reduce item costs to encourage purchases and can boost demand for energy-efficient products like solar panels. A rebate is a form of money back. Conversely, excise duties are taxes on items like tobacco and alcohol to discourage their use.

Public schools, hospitals and transportation are funded to ensure they remain affordable and accessible to all consumers. Tax revenue is also used to provide goods and services for low-income earners.

21.4.3 Government spending and receipts

We have mentioned budgets previously in the context of what the government plans to spend. However, as you may know, budgets are two-sided and the Australian government's budget consists of what it will spend and also what it will earn.

The government earns money from a variety of sources, but a big part of this is from taxing incomes. Sometimes a government spends more than it earns, which is known as a deficit or government debt. At other times, a government spends less than it earns; this is called a surplus.

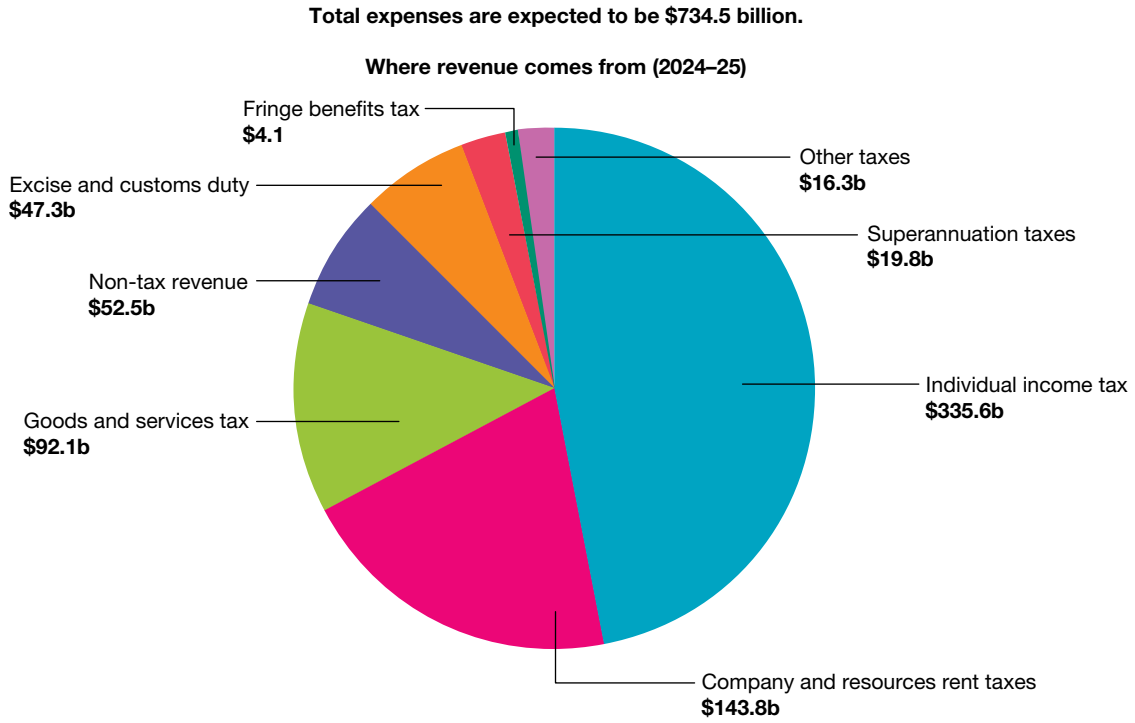
The government's budget for 2024–25 onwards is shown in **FIGURE 3**, with the government having a deficit of $28.3 billion in 2024–25 — an increase from the previous year, with the plan to reduce the deficit over the coming years.

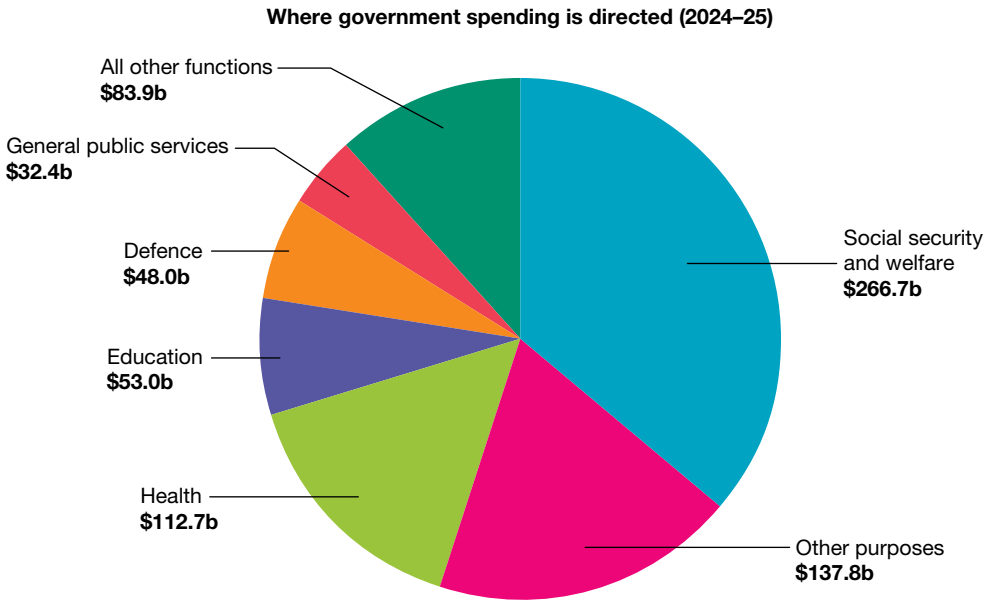
FIGURE 3 The government's budget for 2023–24 and beyond

	Estimates				
	2023–24 $b	2024–25 $b	2025–26 $b	2026–27 $b	2027–28 $b
Receipts	692.3	698.4	719.4	760.0	801.8
Payments	683.0	726.7	762.2	786.7	826.2
Net operating balance	9.3	–28.3	–42.8	–26.7	–24.3

The graphs in **FIGURE 4** show where the receipts are coming from and where the payments are being made.

FIGURE 4 Revenue and spending 2024–25





21.4.4 Taxes that young people pay

Goods and Services Tax

Young people or full-time secondary school students probably don't think about paying tax. However, everyone in Australia will pay some tax each year, the most common being the Goods and Services Tax (GST). This is a tax applied to most goods, services and other items sold or consumed in Australia. GST is a regressive tax, because as a proportion of income, it affects lower income earners more.

FIGURE 5 Most students with a casual or part-time job will not earn enough to pay income tax.

While most food and drink are GST-free, there are some exceptions to this rule, so students in junior and middle secondary school will pay some GST. These items include:

- chewing gum
- potato chips
- dim sims
- doughnuts
- energy drinks.

GST is also paid by young people when they buy clothes and sporting goods, or go out to places such as the cinema or a bowling alley.

Income tax

In terms of income tax, most people under the age of 18 won't pay income tax. All persons earning an income from work are eligible for the tax-free threshold. This is an amount of income a person can earn that does not incur income tax. In 2024–2025 this figure was $18 200.

Most secondary school students who have a part-time job will not earn this amount of money in a year and therefore won't pay income tax.

If a person is under 18, has left full-time schooling, and works full-time, they will be subject to income tax like other full-time workers. To pay income tax, a person must have a tax file number (TFN). A TFN is a personal reference number in the tax and superannuation systems. It is an important part of tax and super records and one's identity, so it should be kept secure. Each person retains their TFN for life, even if they change their name, jobs, move interstate, or go overseas.

People are not required to have a TFN, but without one, they will pay more tax. Additionally, they won't be able to apply for government benefits, lodge a tax return electronically, or get an Australian business number (ABN).

Most secondary school students apply for a TFN when they gain their first part-time job or undertake work experience in Year 10.

21.4 SkillBuilder activity INTERPRETING AND ANALYSING

Australia uses a progressive income tax system known as the pay-as-you-go (PAYG) system. The system groups income earners into tax brackets based on their incomes. The tax brackets in 2024 were shown in **TABLE 1** in section 21.4.1.

1. The following people have asked you to **determine** how much tax they will pay using these tax brackets. Calculate the amount of tax payable for each person.

Person	Income	Person	Income
Adam	$ 35 800	Josh	$ 12 700
Anil	$132 500	Megan	$350 000
Feng	$ 89 200	Dev	$231 600
Claire	$157 400	Kaan	$800 000

2. **Explain** to Kaan and Megan why they pay more tax than others in the group. Ensure you use the information you learned in this lesson in your explanation. Try to keep it simple.

21.4 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 3, 4	1, 5, 6, 8	7, 9, 10

Remember and understand

1. **Determine** whether the following is True or False. Excise duty is only paid by businesses, not by individuals.
2. **Identify** what GST stands for.
   A. Government Services Tax
   B. Government Spending Tax
   C. Goods and Spending Tax
   D. Goods and Services Tax
3. **Identify** two products that have an excise duty imposed upon them.
   A. Fruit
   B. Alcohol
   C. Clothing
   D. Homewares
   E. Tobacco
4. **State** three purposes of Australia's tax system.
5. **Identify** the two types of taxes used by the government.

ANALYSE AND APPLY

6. **Explain** what is meant by *regressive tax* and provide an example.
7. **Explain** what is meant by *rebate* and how it can influence consumer spending.

EVALUATE AND COMMUNICATE

8. **Explain** why it is important for the government to redistribute income through taxation. **Justify** your response.
9. **Explain** why the government needs to use some taxation revenue to produce goods and services.
10. **Explain** the concept of a budget deficit and why you think it may be necessary for a government to plan for a deficit.

Answers and sample responses for this topic are available online.

LESSON 21.5 Inquiry: How would you tax the Australian public?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** the process involved in developing a tax system.

Background

In reading and discussing the material in this topic, you should now have an understanding of Australia's taxation system. Each year it is the responsibility of the Treasurer (a government minister) to prepare Australia's budget. The Treasurer determines how much money the government will raise through taxation — and whether to raise or lower taxes, introduce new taxes or abolish a tax. The Treasurer also determines what the money will be spent on and in which amounts.

Your task is to consider how you might tax the Australian public and how you might allocate the tax raised.

FIGURE 1 The Hon Dr Jim Chalmers MP was sworn in to the role of Treasurer on 23 May 2022.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

Inquiry steps

Step 1: Questioning and researching

Investigate the current tax system to work out some of the tax types and rates.

Step 2: Interpreting and analysing

Analyse the information you found and **consider** how fair you think it is.

Step 3: Evaluating, concluding and decision-making

Decide on your own version of a tax system for Australia — **consider** the types of taxes and the rate.

Allocate spending of the money that you will raise through your tax system — use percentages (such as 10 per cent of revenue on health care). Be prepared to **justify** your choices if asked.

Step 4: Communicating

Communicate your new tax system in a visual way. You might **create** a poster containing infographics or a PowerPoint presentation.

LESSON 21.6 Consumer and financial literacy

LEARNING INTENTION

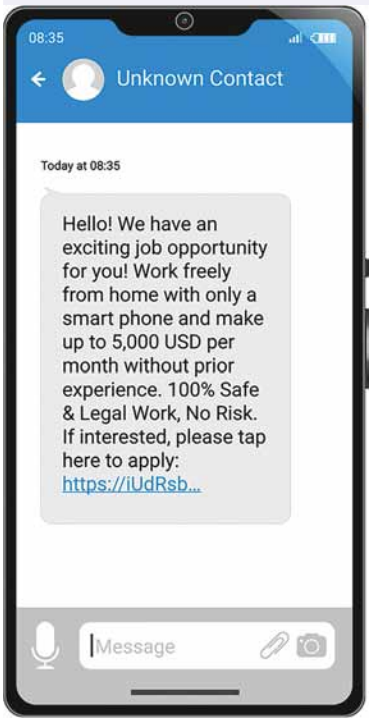
By the end of this lesson you should be able to **explain** the importance of being a smart consumer.

Tune in

It's important to know the other groups that operate within the Australian economy as well as knowing your role. However, it is important to be able to tell the difference between legitimate interactions with these groups and potential fraud or 'scams'.

1. **What do you think scammers are trying to achieve by sending a text message like the one in FIGURE 1?**
2. **What do you think your parents or caregivers would do if they received such a text?**
3. **What would you do?**

FIGURE 1 Do you know someone who has received a text like this?



21.6.1 Consumer literacy

Consumer literacy is a combination of knowledge and skills that consumers use to make informed decisions. It includes our proficiency in reading and writing, as well as the ability to manage one's identity.

Consumer literacy is important because it helps us — consumers — make informed decisions about our own money.

We will, at some point, need to make decisions about:

- saving money
- borrowing money and using credit
- comparing prices
- making good purchases
- understanding consumer law and rights
- understanding product safety.

Some factors that can affect consumer literacy include:

- age
- education
- income
- culture
- language
- disability.

21.6.2 The importance of financial literacy

Financial literacy is the ability to understand and use financial skills and concepts to make informed decisions about money. It includes the following:

- Understanding financial products: Knowing how to compare prices, make good purchases, and understand consumer rights
- Managing risk and reward: Understanding the trade-off between risk and return, and how to protect finances through insurance, savings and superannuation
- Budgeting and saving: Learning how to create a budget, track spending and plan for retirement
- Managing debt: Understanding how to manage debt responsibly
- Financial planning: Knowing how to set and achieve financial goals
- Financial awareness: Being aware of unethical financial practices and scams
- Seeking professional advice: Knowing when to seek professional financial advice

Financial literacy can help people avoid poor financial decisions, achieve financial stability, and support life goals. It's important in today's society, where people face many financial challenges, such as student loans, mortgages, credit cards and **investments**.

Financial literacy can be improved through reading, conducting research before buying, subscribing to financial content, or talking to a financial professional.

Did you know?

The term 'smart consumer' is used to describe someone who is both consumer and financially literature. Meaning that they understand how to navigate the marketplace effectively and also how to manage their own finances.

21.6.3 The importance of money and finance

A first step in both consumer and financial literacy is understanding money and its purpose in our lives.

FIGURE 2 While the use of 'physical' currency is declining, money is hugely important in our lives.

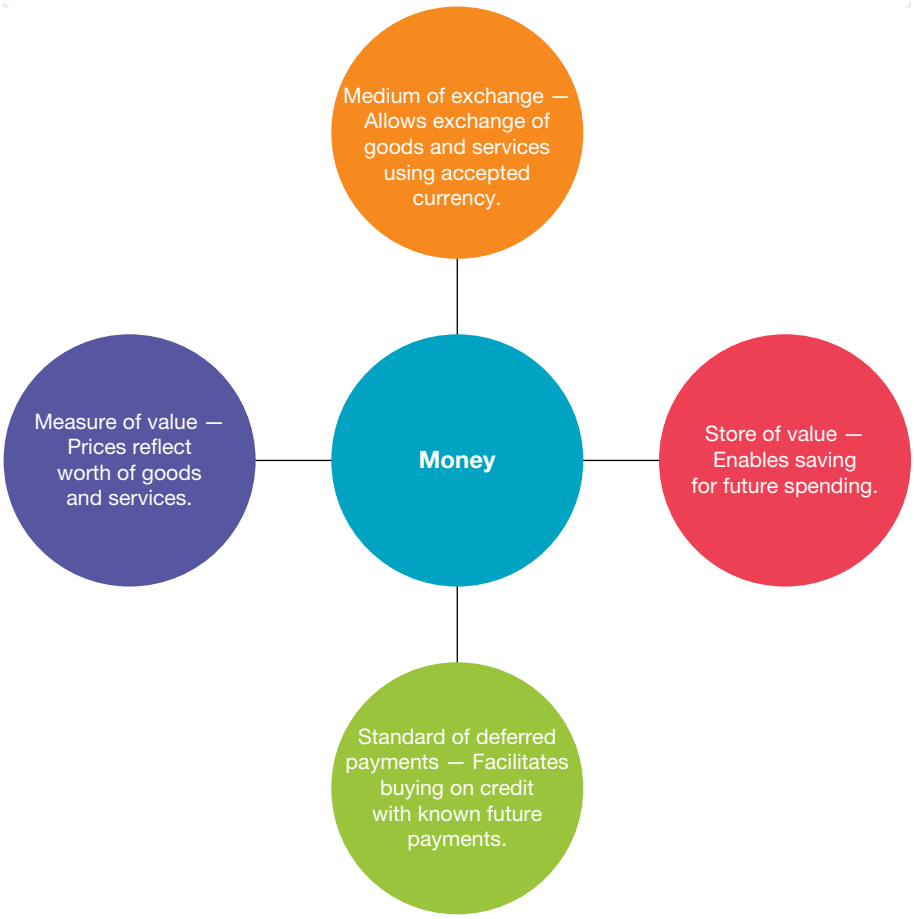
The functions of money

Money performs four very important functions in our market system:

SkillBuilder discussion

Investigating

1. Do you carry physical money, i.e. notes and coins? If so what do you use it for?
2. What do you know about 'credit'? Can you explain to a partner how it works?



The working of financial markets

Just as all goods and services have a price, so does money. The price of using money that belongs to someone else is called interest. When you deposit money in a bank, the bank pays you interest on your savings. For example, if you deposit $100 and the bank pays three per cent per annum, you earn three dollars in interest after a year. Interest is usually calculated monthly or daily, so if you withdraw early, you get less.

Banks lend out deposited money to other consumers or businesses, charging a higher interest rate to borrowers than they pay to depositors, thus making a profit.

Financial markets operate like any other market, with sellers aiming to get the best price for their goods and services, while buyers want to pay the lowest price. Depositors want the best interest earnings for their money, and borrowers want to pay the lowest interest.

Share market

Like other markets, the stock market (also called the share market) is simply a relationship between buyers and sellers. In this case it is shares in companies that are bought and sold. A share is a unit of ownership in a company. Large companies divide their ownership into millions of shares, which can be bought and sold through the stock market. In Australia, this is the Australian Securities Exchange (ASX). The ASX was formed in 1987 by merging the stock exchanges of the six capital cities. Today the ASX is based in Sydney, but also has offices in Perth and Melbourne.

FIGURE 3 Buying shares listed on the ASX enables you to become a shareholder in a variety of different businesses.

Over 2,000 companies are listed on the Australian Securities Exchange (ASX), including Woolworths and Wesfarmers (owner of Coles), the four big banks (ANZ, CBA, NAB, and Westpac), and large mining companies such as BHP Group Limited.

The value of shares can fluctuate based on supply and demand. When a company reports strong performance, increased investor interest can drive share prices up. If a company is under performing, shareholders will seek to sell, causing share prices to decline.

As the price of a company's shares goes up or down, so too does the value of a shareholder's investment. The value of most shares tends to rise over time, even though the prices can fluctuate daily. People who hold shares for long periods (generally more than 10 years) benefit from **capital growth**. Owning shares means you can also benefit when the company makes a profit, as profits can be distributed to shareholders as **dividends** or in extra shares.

Did you know?

You don't need to be a stockbroker to buy shares! While licensed stockbrokers trade on the ASX for a fee and often recommend spreading your investments across different companies to reduce risk, you can also buy shares yourself online. Platforms like CommSec and CMC Markets Invest let you trade shares with as little as $600.

21.6 SkillBuilder activity INVESTIGATING

Go to the Consumer Affairs Victoria website. In the search bar, type 'Online shopping' and click on the most relevant results to help you answer the following questions.

1. What are two key risks when buying something online?
2. What protections or rights do you have if a product you bought online is faulty or doesn't arrive?
3. What should you look out for to make sure a website is safe and reliable before making a purchase?
4. Find and describe one example or case study (if available) on the website that shows what can go wrong with an online purchase.

Extension Question

5. How can understanding your consumer rights help you make better purchasing decisions in the future?

21.6 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3, 5	4, 6, 8	7, 9, 10

REMEMBER AND UNDERSTAND

1. **Identify** a professional whom a consumer should consult when considering a major financial decision, such as buying a car.
2. **Identify** what ASX stands for.
   A. The Australian Stock Exchange
   B. The Australian Securities Exchange
   C. The Authority for Stock Exchange
   D. The Australian Securities Commission
3. **Explain** why it is important to be on the lookout for scams.
4. **State** the four functions of money.
5. **State** three factors that can affect a person's consumer literacy.

ANALYSE AND APPLY

6. **Explain** two decisions a consumer might make that will be improved by being financially literate.
7. **Explain** why interest is called the 'cost of money'.
8. **Explain** what is meant by money as a standard of deferred payment.

EVALUATE AND COMMUNICATE

9. 'You need to a stockbroker to buy shares and make sound investment decisions.' **Discuss** this statement.
10. **Discuss** whether owning shares is a good investment for most people (considering most people earn an average income).

Answers and sample responses for this topic are available online.

LESSON 21.7 Review

21.7.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

21.2 Our role in the economy

- Consumers satisfy their needs and wants by working to earn money, and then buying goods and services from businesses that produce those goods and services.
- The finance sector manages our money.
- We interact with the overseas sector through buying and selling of goods and services.

21.3 The role of the government in the economy

- The government performs a number of roles in the Australian market system including:
  - the provision of welfare and infrastructure
  - economic management
  - regulation of wages and employment conditions
  - provision of some goods and services
  - management of planning and the environment
  - regulation of international trade
  - setting of immigration policies and targets.

21.4 The Australian taxation system

- Australia's tax system comprises numerous different types of taxes.
- Taxes can be direct or indirect.
- Taxes may be progressive, proportional, or regressive.
- Taxes (rebates) can influence consumer decisions and producer behaviour.

21.5 Inquiry: How would you tax the Australian public?

- Many considerations need to be made when developing a fair tax system.

21.6 Consumer and financial literacy

- It is important to be able to interact with businesses, financial intermediaries and the government safely and securely.
- Consumer literacy helps us make informed decisions.
- Financial literacy helps us develop skills to make informed decisions about money.

21.7.2 Key terms

budget estimates of all government income to be raised by taxes and other charges, and the planned spending of that income, within any given year
capital growth an increase in the value of shares or property over time
direct taxation A type of tax that is paid straight to the government by individuals or businesses on their income or profits. For example, income tax is a direct tax because it is taken directly from a person's earnings.
dividends company profits paid to shareholders, either in cash or as more shares
export a good or services sold by local businesses to overseas consumers
financial institution any organisation that takes deposits from those with surplus funds, and makes those funds available to borrowers
household sector a term used by economists to refer to the total of all consumers in the economy
import goods or services purchased by local consumers from overseas businesses
indirect taxation A type of tax that is added to the price of goods and services and paid to the government by the seller. Consumers pay this tax when they buy things. For example, the Goods and Services Tax (GST) is an indirect tax included in the price of most items.

infrastructure the facilities, services and installations needed for a society to function, such as transportation and communications systems, water and power lines
interest a charge made for the use of money that has been deposited or borrowed
investment the direction of money into the purchase of equipment or premises for the establishment of a new business, or the expansion of an existing business
labour the human skills and effort required to produce goods and services
mortgage loan a loan advanced to allow a person to buy a house or other property, with the property itself as security for the loan. This means the bank or other lender can take possession of the property if the borrower fails to make the regular payments.
privatise to sell a government-owned provider of goods or services to private investors
progressive tax system in theory, people who earn more money pay more income tax
tariff a tax on goods imported from a foreign country
tax a compulsory financial charge or some other type of levy imposed on an individual, household or business by a government body in order to fund government spending
unemployment benefit a welfare payment by government to people who are unemployed and looking for work. Such payments in Australia are generally known as the JobSeeker Payment.

21.7.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry question posed in the Overview:

What is your role within the economy, what do you need to know and who can help?

1. Now that you have completed this topic, what is your view on the question? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a report outlining a well-known scam and how being financially literate can help identify such scams.

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Post-test	Online post-test
eWorkbook	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary

21.7 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 4, 8	2, 6, 7, 9, 10	5, 11

REMEMBER AND UNDERSTAND

1. Economists identify the household sector as:
   A. all people living in houses.
   B. all consumers in the economy.
   C. businesses that operate from private homes.
   D. consumers that have taken out a mortgage loan.
2. The government in Australia has an impact on markets by:
   A. determining prices in the retail market.
   B. controlling interest rates in the financial market.
   C. regulating minimum wages in the labour market.
   D. promoting capital growth on the stock market.
3. When the government enters into trade agreements with other countries:
   A. both countries may agree to lower tariffs for each other's goods and services.
   B. both countries may agree to increase tariffs for each other's goods and services.
   C. the exporting country may agree to increase tariffs.
   D. the importing country may agree to increase tariffs.
4. Income tax in Australia is an example of:
   A. an indirect tax.
   B. a proportional tax.
   C. a progressive tax.
   D. a regressive tax.
5. Identify the type of economy used in Australia.
   A. Capitalist economy
   B. Market economy
   C. Socialist economy
   D. Command economy
6. Which of the following ***is not*** a function of money?
   A. Medium of exchange
   B. Store of value
   C. Measure of value
   D. Measure of credit

ANALYSE AND APPLY

7. **Recall** the four functions of money.
8. **Explain** the role of buyers in the Australian economy.
9. **Distinguish** between imports and exports and explain why we need them in our economy.

EVALUATE AND COMMUNICATE

10. **Discuss** two roles played by the government in the economy.
11. **Evaluate** Australia's tax system.

Answers and sample responses for this topic are available online.

22 Financial goals and decision-making

LESSON SEQUENCE

22.1 Overview 626
22.2 What are short-term personal financial goals? 628
22.3 What are long-term personal financial goals? 632
22.4 What is business finance? 637
22.5 Aboriginal and Torres Strait Islander communities in the market 643
22.6 What factors influence business opportunities? 647
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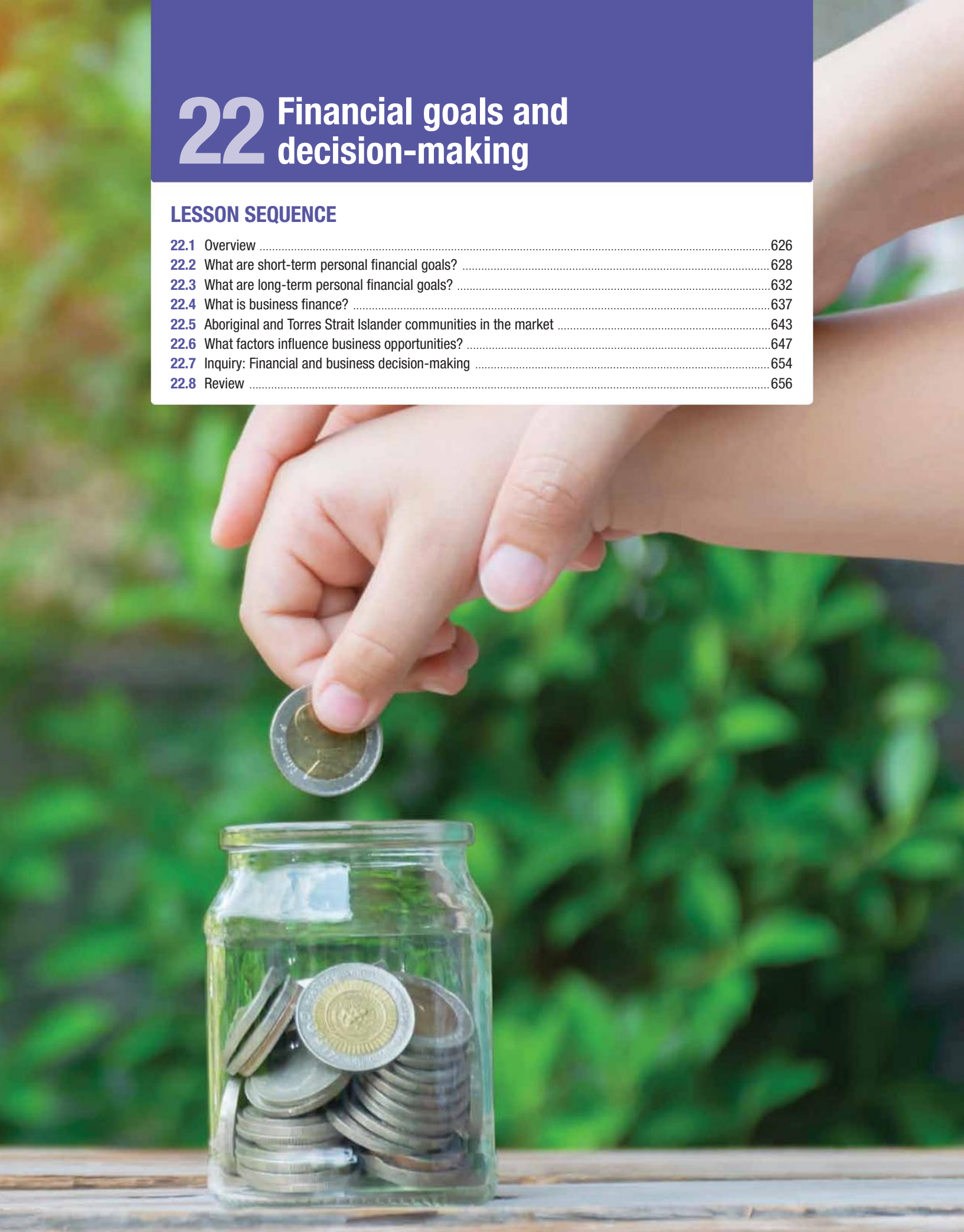
22.8 Review 656



LESSON 22.1 Overview

INQUIRY QUESTION

Why is financial planning, including budgeting and achieving personal financial objectives, important?

What financial decisions are businesses making? And how do they respond to a changing market?

This topic examines financial planning from both a personal and business perspective.

Learning how to budget is a crucial skill that makes sure spending does not go over the amount of money coming in. Effective budgeting involves tracking income, categorising expenses, and setting future financial goals.

For businesses, understanding how to calculate profit and loss is essential. This process involves assessing revenues, deducting expenses, and determining net income. Accurate profit and loss calculations help businesses to survive.

Business survival is also dependent on how business owners respond to a changing market. This topic will consider some different approaches to making the most of the business opportunities available.

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Pre-test
Online Pre-test

eWorkbook
Customisable worksheets for this topic

Digital document
Key terms glossary

SkillBuilder

Use the SkillBuilder activities to develop these Economics and Business concepts and skills:

- **INVESTIGATING**
- **INTERPRETING AND ANALYSING DATA AND INFORMATION**
- **EVALUATING, CONCLUDING AND DECISION-MAKING**
- **COMMUNICATING**

LESSON 22.2 What are short-term personal financial goals?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** sources of income and forms of expenditure for individuals
- **identify** options for a budgeting and savings plan using short-term personal financial objectives.

Tune in

All people require money to purchase the things they want (non-essentials) and the things they need (essentials). How could young people make and manage this money?

1. **Make a list of the types of things that you would expect a secondary school student of your age to purchase each week.**
2. **Decide whether these things are *needs* or *wants.***
3. **Where could a teenager's money come from to buy the items? Regular pocket money, allowance, or other cash income? If so, what methods could they use to make it last until the next payment?**

FIGURE 1 Where does your money come from and where does it go?

We all enjoy having money to spend, and many aspire to be wealthy. However, few achieve this luxury. It is essential to consider how to earn and manage money effectively.

Starting a business is one way to earn money, showcasing entrepreneurship by creating something unique. If you have skills or a business idea, this path can be rewarding. Whether you run your own business, work for someone else, or have a part-time job, careful planning and money management are crucial.

22.2.1 Setting short-term goals

It is easier to buy what you want if you have clear financial goals in mind. When we think about **short-term goals**, we think about things that we want to do within the next couple of months or even within the year. You probably already have some ideas about the types of things you want to buy now or soon into the future. The good thing about setting goals is that they can give you an immediate and achievable purpose and this may include you saving money to get what you want.

Tips for goal setting:

- Goals should be realistic, or you will become discouraged.
- Goals should be specific. For example, 'My goal is to save $200 in six months for new sneakers.'
- Avoid vague goals (such as 'My goal is to get rich') because their exact meaning is unclear.

22.2.2 Budgeting

A common short-term financial goal is to save money so that you can buy something expensive in the near future. Having a regular source of money is ideal but won't last long unless you make wise choices as to what you do with it. This is why it is important to keep track of your money — how much you receive and how much you spend, so you can make your money work for you.

FIGURE 2 Working out your current financial position is important.

You may not realise it, but saving money is quite easy. By putting aside even a small amount on a regular basis, you will be amazed at how soon you can build up your savings. Then you will have more cash available to buy those things you really want.

To save the money you need to buy a new gaming console, for example, you will need a **budget**. A budget is a plan which considers the amount of money that you have coming in compared to the money that you have going out. Preparing a budget means that you can plan your finances to ensure that you have enough money to meet your future needs. Most people prepare a budget to manage their personal finances. Families, businesses and governments also use budgets. The aim is always the same: planning to ensure that expected income (estimated cash in) will match or hopefully exceed expected expenses (estimated cash out).

Assessing your current financial position

With a bit of planning, you can start to budget. However, the first stage is to realistically examine your **current financial position**. Here are three questions that you can ask yourself:

- What **income** do you have (money coming in)?
- What are your regular **expenses** (money going out)?
- Do you have any money left over after covering your expenses?

You can start your planning by following the steps illustrated in **FIGURE 3**.

SkillBuilder discussion

Evaluating, concluding and decision making

1. Based on what you know already, what are the major sources of income for young people?
2. What are the major expenses for young people? How does this differ from adults?
3. Do you think that the above method of saving is realistic? Give reasons for your response.

FIGURE 3 If you extend these steps to cover several months of income and expenses, you will gain a more complete picture of your spending and saving habits.

STEP 1 Calculate your monthly income. This includes income you receive from all sources such as pocket money, odd jobs or a part-time job. — **INCOME**

↓

STEP 2 Calculate your total monthly expenses. Expenses include all the money you spend on items such as entertainment and food. — **EXPENSES**

↓

STEP 3 Subtract your monthly expenses from your monthly income. — **INCOME MINUS EXPENSES**

↓

STEP 4 Assess your cash position by comparing your total income with your total expenses. — **CASH REMAINING**

TABLE 1 shows the current income and expenses of Minh, a 14-year-old Year 8 student.

TABLE 1 Minh's current income and expenses

	January	February	March
Income	$	$	$
Pocket money	45.00	45.00	45.00
Odd jobs	20.00	15.00	5.00
Allowance from grandparents	15.00	15.00	15.00
Total income	80.00	75.00	65.00
Expenses			
Magazine	5.00	5.00	-
Fast food	30.00	25.00	20.00
Games	10.00	10.00	10.00
Clothes	30.00	25.00	25.00
Total expenses	75.00	65.00	55.00
Cash remaining (income – expenses)	5.00	10.00	10.00

SkillBuilder discussion

Interpreting and analysing data and information

1. Study **TABLE 1**. Can you see some possible savings?
2. Can you see the possibility of extra income?
3. How much is Minh able to save each month given his current income and expenses?

Minh has decided he wants to buy a new PlayStation controller in 3 months' time, at a cost of $90. This is a short-term goal. He has offered to do some odd jobs around the house for his parents to maintain his income of $20 per month from this source. He has also decided he can cut back on some spending by reducing his fast-food purchases, limiting his game purchases to $5 per month and cancelling the magazine purchase. **TABLE 2** shows what Minh's *planned* budget for three months might look like.

TABLE 2 Minh's planned budget

	April	May	June
Income	$	$	$
Pocket money	45.00	45.00	45.00
Odd jobs	20.00	20.00	20.00
Allowance from grandparents	15.00	15.00	15.00
Total income	80.00	80.00	80.00
Expenses			
Fast food	15.00	15.00	15.00
Games	5.00	5.00	5.00
Clothes	20.00	20.00	20.00
Total expenses	40.00	40.00	40.00
Cash remaining (income – expenses)	40.00	40.00	40.00

SkillBuilder discussion

Interpreting and analysing data and information

1. Look at **TABLE 2**. How much is Minh able to save each month given his planned changes to his income and expenses?
2. In total how much has Minh saved?
3. How much will he have left once he has bought his PlayStation controller?

22.2.3 Benefits of saving

Basic budgeting for short-term goals, as shown in the example above, is beneficial as it allows you to develop a savings plan. Saving comes with many benefits for an individual, such as:

- more independence and security
- a sense of satisfaction
- ability to pay for unexpected expenses
- avoiding the need to borrow money and the worry about repaying the debt
- ability to plan for buying big items, such as a bike or a car.

FIGURE 4 What short-term goals do you have? You might wish to try a new sport or hobby, which may mean that you must save money to pay for it.

22.2 SkillBuilder activity INTERPRETING AND ANALYSING DATA AND INFORMATION

1. **Identify** two short-term achievable personal financial goals that you or another student in a secondary school might have. It may help to think about things that a student may wish to save for and buy. Examples might be a new pair of sneakers, gaming console or some new clothes.
   a. **Determine** how long it might take you to achieve each goal.
   b. **Compare** your goals with those of others in your class. **Determine** whether they are similar or different.
   c. **Determine** what you can learn about financial goals by comparing them with the goals of others.
2. **Prepare** a cash budget for the next three months which will allow for the financial goal to be met. Copy the format used for Minh's budget in **TABLE 2**, but with the typical income and expenses of a secondary school student. (You may wish to refer back to the Tune in activity for a list of expenses that a student may have.)
3. **Compare** your budget with that of the person next to you. Explain what similarities and differences you have.
   a. **Determine** whether your budget allows for any savings.
   b. If you wanted to save more to meet one of the short-term goals in Question 1, **determine** how you could adjust the budget. **Identify** any extra sources of income you could access, or any possible savings within your expenses.
   c. **Create** an amended budget to show the changes.

22.2 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 4	2, 5	6, 7, 8

REMEMBER AND UNDERSTAND

1. **Determine** which of the following best **describes** the term *budget*.
   A. Anything to do with money — particularly income, expenses and savings
   B. A compulsory savings scheme
   C. A person's wage or salary before it is taxed by the government
   D. An estimate of future income and expenses used to assist financial planning
2. **Define** what is meant by *short-term financial goal*.
3. **Complete** the following sentences.
   a. Income is otherwise known as money **coming in** / **going out**.
   b. Expenses are otherwise known as money **coming in** / **going out**.

4. 'My goal is to be a millionaire by the time I'm 30.' **Identify** the problems with this statement as a short-term financial goal. **Select** all possible answers.
   A. It is not specific.
   B. It is unrealistic.
   C. It is too realistic.
   D. It is a longer-term goal.
   E. It is impossible.
5. **State** the steps involved in preparing a budget.

ANALYSE AND APPLY

6. **Describe** the benefits of preparing a cash budget.
7. **Explain** what is meant by the term *budget* and **outline** why a budget might be a useful tool for an individual to use.

EVALUATE AND COMMUNICATE

8. Provide two examples of short-term personal financial goals. **Evaluate** the costs and benefits of setting short-term personal financial goals.

Answers and sample responses for this topic are available online.

LESSON 22.3 What are long-term personal financial goals?

LEARNING INTENTION

By the end of this lesson you should be able to:
- **identify** and explain options for a budgeting and savings plan using long-term personal financial objectives
- **explain** why the prioritising of needs and financial responsibilities over personal wants is important.

Tune in

Setting goals and budgeting helps us to save money for our expenses.

1. **With a partner, make a list of the financial goals that you might have as an adult. One example might be buying a house.**
2. **List the possible sources of income that you might have as an adult. This may include access to a steady income.**
3. **What might be the typical expenses that you would have as an adult? Using the following categories, list the costs that you may encounter as part of your total monthly expenses.**

FIGURE 1 What are your financial goals?

Home & utility bills	Insurance	Groceries	Entertainment

4. **What things are missing? What other categories of expenses might you have?**

22.3.1 Setting long-term goals

Long-term personal financial goals are something that you will want to accomplish in the future. **Long-term goals** require time and planning. They are not something you can do this week or even this year. Long-term goals are usually at least five years away. Sometimes it takes many steps to complete a long-term goal.

For example, your long-term goal might be to graduate high school with a senior secondary certificate. This will take several years of going to school and studying. Going to class next month might be one step in achieving your goal. Passing an important test can be another step. Achieving these steps helps you reach your long-term goal.

As a young person, you may not think too far into the future, but once you start to earn money and have a regular income, your short-term financial goals will turn into bigger long-term financial goals. These include putting down a deposit on a house, paying off a mortgage, starting a business, saving for a child's higher education fees, and planning for your retirement fund.

22.3.2 Common long-term personal financial goals

Buying a house

For many, buying a house is a significant financial goal and likely the biggest purchase of their lives. It's also a long-term investment, as property values generally rise over time.

In Australia's major cities, houses bought for under $100 000 twenty-five years ago can now exceed a million dollars in value. Owning a home offers security, vital for families and those nearing retirement.

Buying a home typically requires a mortgage loan, with the house as collateral. This means that if payments are missed, the lender can seize the property. Loans usually span over 20 years or more with monthly repayments. Given the interest, the total repayment can be three to four times the borrowed amount.

Over time, rising wages often make these repayments easier. Many choose to pay more than the minimum to reduce interest and repay the loan faster. Effective financial planning should account for these loan commitments.

SkillBuilder discussion

Investigating

1. What event is shown in **FIGURE 2** and how does it relate to the long-term financial goals discussed in the text?
2. Why is the concept of property investment as a long-term financial goal seen as a good idea?
3. Discuss the challenges associated with buying a house or managing a mortgage.

FIGURE 2 The purchase of a house can be a great investment for the future.

Investing in shares

Many Australians invest their money by buying shares, which are units of ownership in a company. Large businesses often have thousands of shareholders, allowing shares to be bought and sold like goods. The value of shares changes with the company's value, affecting the investor's stake. Shareholders benefit from profits through dividends or extra shares and may see capital growth if share values rise. Trading shares occurs via the Australian Securities Exchange (ASX), where stockbrokers buy and sell shares for a fee on behalf of adult individuals.

FIGURE 3 Stockbrokers buy and sell shares on behalf of their clients.

Saving for retirement

Retirement in Australia can occur at any age, but individuals must be able to cover their living expenses. The government provides a **pension** for those aged 66–67 (depending on the date of birth) who retire. This pension covers basic needs but is not luxurious. Individuals with sufficient finances should plan for retirement through superannuation to become self-funded retirees and avoid reliance on the state pension.

What is superannuation?

Superannuation, sometimes shortened to 'super', is a compulsory savings scheme whereby **employers** contribute an additional percentage of an employee's **gross wage** into a **superannuation fund**. **Employees** can also choose to contribute to this fund, thus increasing the overall amount they will receive at retirement. How much any employee chooses to contribute is up to them. There are laws in place that determine the age at which you are eligible to access your superannuation savings.

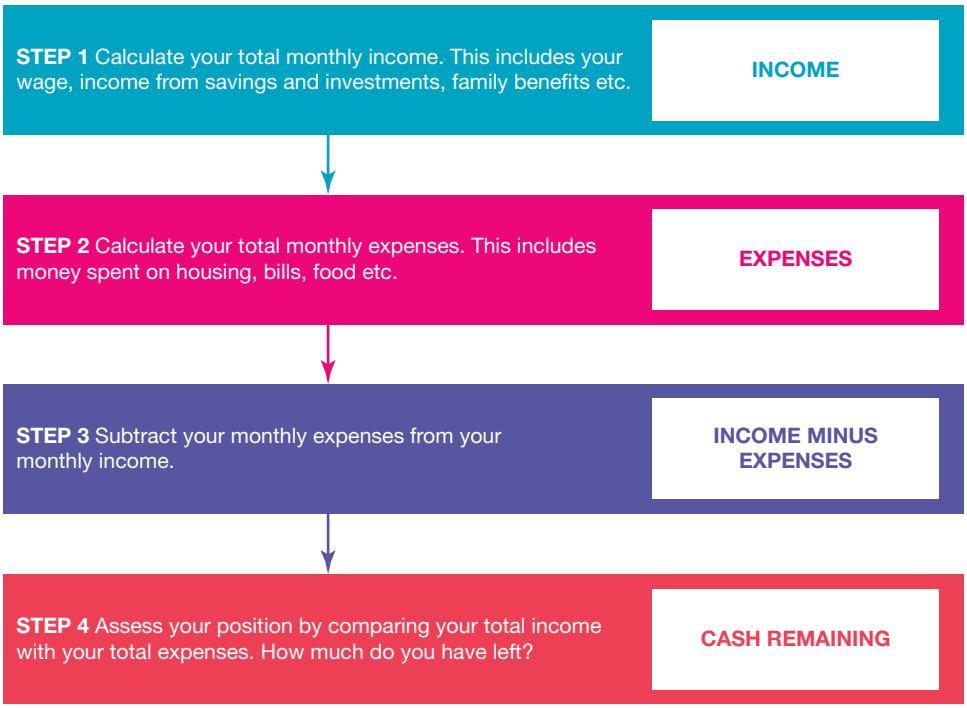
In general terms, people cannot access their superannuation unless they retire, reach the official retirement age or have an illness/medical condition that prevents them from working again. By the time people retire, there may be 40 years of contributions in the individual's fund, so this may be enough to fund retirement. Any extra contributions the person makes during their working life can help achieve this goal.

22.3.3 Budgeting and savings plan

As you have probably realised by now, budgeting for long-term goals works on the same principles as the budgets that we looked at in lesson 22.2.

The money that is left once we have subtracted our expenses from our income is usually referred to as the money that we can save. Savings add up over time in our bank accounts and earn interest for us at the same time. The money that we save can eventually be used for major financial purchases, such as providing a deposit for a house, or it can be placed into a pension fund for retirement.

FIGURE 4 Creating a long-term savings plan uses the same four-step process as a budget that is used for achieving short-term financial goals.



22.3.4 Prioritising needs and financial responsibilities over personal wants

When you are planning your budget and examining your income and expenses to achieve a short- *or* long-term personal financial goal, it is important to know the difference between what you ***need*** and what you ***want***. It also means knowing the difference between immediate financial commitments and things that can wait.

Have a look at the following expenses in **FIGURE 5**.

FIGURE 5 Common expenses

SkillBuilder discussion

Communicating

1. Look at the images in **FIGURE 5**. Can you decide which things are an immediate need which must be paid for straight away and cannot wait?
2. Which things are long-term wants?
3. Is there anything that is in between an immediate need and a long-term want?

When we are budgeting and thinking about our long-term financial goals, we need to consider everything that we need to pay for straight away, and make sure that we have enough money to cover this first. That means identifying things like groceries, any medicines needed and transport expenses, and making sure that these things are budgeted for before anything else.

22.3 SkillBuilder activity INTERPRETING AND ANALYSING DATA AND INFORMATION

1. **Explain** why buying shares might be considered a sensible long-term financial goal.
2. **Examine** a stock market report online by visiting the **ASX** weblink in the Resources panel and selecting the ASX200 top 5. You can click on an individual company for more detailed information. This will display a graph of the share prices.
   Answer the following questions:
   a. **Identify** two companies that experienced an increase in share price during the previous day's trading.
   b. **State** by how much each increased in price.
   c. **Determine** how many shares were bought and sold for each company.
   d. Set the time period on the graph to one year. **Identify** the highest and lowest price that each company's share reached during this time period.
   e. **Identify** whether the current price is closer to the highest or lowest experienced during the past year.
   f. From what you can see of the shares in these two companies, **determine** whether they would be good value to buy right now. **Explain** your answer.

22.3 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 4, 5	2, 3, 8, 9	6, 7, 10

REMEMBER AND UNDERSTAND

1. By the year 2035, the minimum age for accessing the pension will have risen to _____.
2. **Define** what is meant by *long-term personal financial goal*.
3. **Provide** three examples of long-term personal financial goals.
4. **Identify** three benefits of owning shares. **Select** all possible answers from the options below.
   A. The value of shares can fall, which means that you can lose money.
   B. The value of shares can rise, which means that you can gain money.
   C. You 'earn' a share in the company's profits.
   D. Shares allow you the flexibility to buy and sell when you need to.
   E. Your shares may only be worth a fraction of what you paid for them if the company fails.
5. From the options below, **select** the expenses that are classed as needs.
   A. Groceries
   B. A holiday
   C. Medicines
   D. Dinner at a restaurant
   E. Coffee with friends
   F. A gym subscription

ANALYSE AND APPLY

6. **Explain** why a property is considered a long-term investment. You may wish to give an example to support your answer.
7. **Describe** the role of superannuation in planning for retirement.

8. **Distinguish** between short-term personal financial goals and long-term personal financial goals, providing an example.
9. **State** the steps involved in preparing a long-term budget.

EVALUATE AND COMMUNICATE

10. **Determine** the difference between wants and needs in relation to budgeting and financial planning.

Answers and sample responses for this topic are available online.

LESSON 22.4 What is business finance?

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** sources of revenues and costs for businesses
- **explain** how financial records can inform decisions about how business is conducted.

Tune in

Consider a simple cup of coffee.

1. **Split a page in your book or Word document into two, so that you have two sides or columns. With a partner, brainstorm the *costs* involved in making a cup of coffee for a customer in a cafe. Place these on the left-hand side.**
2. **Now think about the money that the business takes in. How much is a cup of coffee? How many cups of coffee might a cafe sell in one day? Would the daily income from the cups of coffee a cafe sells be likely to cover its daily ingredient costs?**
3. **Is this the only source of income for a business? What else could the business sell? Where else might the business get money from? Add these to the right-hand side of your page.**

FIGURE 1 Coffee is a popular item sold in cafes.

22.4.1 Revenue and costs for businesses

All business activity involves thinking about the money coming in or money going out of a business. Take the example of selling a cup of coffee in a cafe. Every time the cafe sells a cup of coffee, it receives money. Every time it buys milk from other businesses, it must pay for it. If a business owner employs any additional staff, they have to be paid wages. A cafe also has regular electricity, gas and internet bills to pay.

All of these money-based activities are known as financial transactions. Running a business involves keeping a record of all **costs** and sources of income because it will help the owner to track how well the business is performing.

All financial transactions can be classed as receipts or payments. Receipts, otherwise known as **revenue**, occur when a business receives money; this is usually when a customer purchases something. On the other hand, payments, known as costs, occur when a business pays out money. This might be to a supplier or to staff. To make a profit, a business must receive more money than it spends. **FIGURE 2** shows how this works.

In the past, business owners would manually write up their financial records in books called journals. This meant writing down each time a sale was made or each time a cost was encountered. Journals are still important, but they are usually not handwritten records anymore. Instead, most businesses use simple computer programs, online banking, cash registers and an EFTPOS terminal to record transactions immediately and accurately.

The process of entering and maintaining financial records is called bookkeeping. Businesses can buy software such as MYOB or QuickBooks to help with this process. These programs set up electronic journals that allow a business owner to enter details of the day's transactions. The programs are based on spreadsheets and, with all the necessary formulas already entered, the business owner simply has to enter the figures and the program performs the necessary calculations.

SkillBuilder discussion

Investigating

1. What has been happening to coffee bean prices recently?
2. How might this impact on the revenue vs cost diagram above?

FIGURE 2 If revenue is greater than costs, a business should make a profit.

22.4.2 Recording revenue and costs

Revenue

Some businesses still keep a cash register (or box) on or under the counter. There will be some cash, coins and notes in this register. This is known as *float*, and it is there so a business owner can give change to customers if they pay with cash. As each customer pays, the sale is recorded on the register and the cash deposited in the register drawer. The cash register will then print a receipt for the customer.

Nearly all businesses also have a card reader for EFTPOS and credit card transactions. This reader is linked to the cash register, which also records these transactions. A copy of the EFTPOS receipt will be printed for the customer, and a second one for the business. This is usually placed in the register drawer with the cash.

At the end of the day, a business owner can retrieve a total of the day's receipts from the cash register. They will then add the total of the cash and EFTPOS receipts in the drawer, subtract the amount in the float before the first transaction, and it should equal the total amount recorded in the register. A business owner will record this revenue figure in the cash receipts journal of the bookkeeping software. At some stage, the cash will be deposited into the business bank account.

FIGURE 3 relates to a small cafe business.

FIGURE 3 The revenue of a cafe business over a seven-day period

Date	Details	Receipt no.	Cash sales ($)	EFTPOS sales ($)	Other receipts ($)	Total revenue
Jan 3	Sales		460.00	630.00		1090.00
	Refund-ACafe	0003			120.00	120.00
Jan 4	Sales		340.00	540.00		880.00
	Sales		440.00	590.00		1030.00
Jan 5	Soft drink machine sales	0004			100.00	100.00
Jan 6	Sales		450.00	610.00		1060.00
Jan 7	Sales		430.00	520.00		950.00
Jan 8	Sales		380.00	580.00		960.00
	Refund-ACafe	0005			90.00	90.00
Jan 9	Sales		470.00	650.00		1120.00
Jan 9	**Total**		**2970.00**	**4120.00**	**310.00**	**7400.00**

Most of this revenue is made up of cash and EFTPOS sales. The business owner has also included a section for refunds from a local supplier and they receive money from the sales from a soft drink machine. Calculating the total revenue is the first stage in seeing if the business makes a profit.

Costs

Just as much of the sales in a business are electronic, most businesses pay for things via online banking. Each time a business makes a payment, the bank provides a reference number as a means of recording the transaction. Bookkeeping software enables the business owner to record each payment just as they did with each cash receipt. The software has a cash payments journal set up, with columns to record each type of payment.

FIGURE 4 The costs of a cafe business over a seven-day period

Date	Details	References	Bakery ($)	Groceries ($)	Wages ($)	Utilities ($)	Total costs
Jan 3	A1 Bakery	346189	500.00				880.00
	Groceries	458214		380.00			
Jan 4	Electricity	675312				490.00	490.00
Jan 5	Groceries	789324		430.00			430.00
Jan 6	A1 Bakery	876931	500.00				500.00
Jan 8	Wages	987214			600.00		1010.00
	Groceries	996526		410.00			
Jan 9	Total		1000.00	1220.00	600.00	490.00	**3310.00**

You can see regular payments to a bakery, which is a supplier of baked goods. There are also grocery costs such as milk. You can also see the wage costs and an electricity bill.

22.4.3 Financial reports

A business owner will want to know how much money they are earning. Importantly they will want to know if they are making a profit or a loss. Is there enough cash coming in to ensure that the owner can pay the business costs on time? The bookkeeping software can make use of the entries in the journals and provide the business owner with the information they need in different types of reports. Two of these are the **income statement** and the **cash flow statement**.

Income statement

An income statement shows a business's profit over a period. It includes the following:

Sales revenue: Money earned from selling goods and services
Cost of goods sold: Costs of materials used to generate sales (e.g. milk, coffee beans, sugar)
Operating expenses: Costs to run the business (e.g. wages, gas, electricity)

FIGURE 5 An income statement for a cafe

Café

Income statement for the week ended 9 January 2022

Revenue	**$**	**$**	**$**
Cash sales		2970.00	
EFTPOS sales		4720.00	
Soft drink sales		100.00	7190.00
Less **Cost of goods sold**			
Groceries		1220.00	
Bread	1000.00		
Less Bread refunds	210.00	790.00	2010.00
Gross profit			5180.00
Less **Expenses**			
Wages		600.00	
Utilities		490.00	1090.00
Net profit			4090.00

To calculate profit, the first step is to subtract the **cost of materials** used from the total sales revenue. This figure will give a business owner a figure for gross profit. The operating expenses can then be subtracted from gross profit to provide a figure for net profit.

Gross profit = sales revenue – cost of the materials
Net profit = gross profit – operating expenses

The total of all sales revenue was $7190.00. To calculate the cost of goods sold, the money paid for groceries and bread (as shown in the cash payments journal) had to be added, although the actual cost of the bread was reduced by the amount of the refunds, as shown in the cash receipts journal. This cost of goods sold was then subtracted from the revenue figure to give the gross profit. Subtracting the total of the operating expenses from the gross profit gives a final figure for net profit. In this case, the business has made a good profit of $4090 this week.

Cash flow statement

As well as determining whether the business has made a profit during the week ending 9 January, a business owner needs to know if they have enough cash coming into their business to cover the various costs that will have to be paid. Using the data from the two journals, the bookkeeping software can produce a cash flow statement that provides this information.

This statement would be prepared as shown in **FIGURE 6**.

SkillBuilder discussion

Investigating

Study **FIGURES 5** and **6**. Based on what you know about this business, what opportunities might exist in the future? Think about how it can improve its situation or take advantage of a market opportunity.

FIGURE 6 A cash flow statement for a cafe

Café

Cash flow statement for the week ended 9 January 2022

	$	$
Cash inflows		
Total sales revenue	7190.00	
Other cash inflows (bread refunds)	210.00	
Total cash inflows		7400.00
Cash outflows		
Bakery	1000.00	
Groceries	1220.00	
Wages	600.00	
Utilities	490.00	
Total cash outflows		3310.00
Net cash flow		**4090.00**

The net cash flow figure is the amount calculated by subtracting total cash outflows (or payments) from total cash inflows (or receipts). In this case, the figure for net cash inflow was the same as the net profit figure ($4090.00). As the net cash flow is positive, the cafe is bringing in enough cash to cover expenses.

22.4.4 Entrepreneurs and business

We have already seen that business owners need to know their revenue and their costs so they can calculate how much money they have made. An entrepreneur needs to know this information as well.

Having a good idea or developing a unique product is just the start. Turning this idea or product into a business that will support a person financially can be a different task.

An entrepreneur needs to plan and budget correctly, identifying the costs involved in turning an idea into a business, sourcing the required finance and determining the price they will sell this product for — they need to make a profit from their idea.

Television shows such as *Shark Tank* show how entrepreneurs need to source finance, often selling some of their business to an investor to allow them to grow into a sustainable business.

22.4 SkillBuilder activity EVALUATING, CONCLUDING AND DECISION-MAKING

After completing an apprenticeship in building and construction, and being employed by a medium-sized construction company, Hans has set up his own small building business with his business partner, Claire. Both Hans and Claire want to be able to make a living from running their own business. They want the business to make a profit. For this to happen, they must make sure that money received from selling goods and services is greater than what they pay in expenses to run the business.

1. **Define** each of the following in your own words:
   a. Gross profit
   b. Net profit
   c. Cost of goods sold
   d. Journal
2. **Distinguish** between cash inflows and cash outflows.
3. **Explain** the purpose of an income statement for a business owner.
4. Hans and Claire's business has the following transactions during the week ending 31 March 2023.

Date	Details	Amount ($)
March 25	Purchased timber beams	500
March 26	Paid for supplies (plasterboard, nails, screws)	100
March 26	Deposit received from client	5000
March 26	Paid mobile phone bill	46
March 27	Paid for timber beams and concrete slab	550
March 28	Paid for replacement drill	150
March 29	Paid for renewal of building insurance	250
March 30	Paid weekly wages	1600

   a. **Determine** the value of cash receipts for Hans and Claire's business.
   b. **Create** a cash payments journal with columns for dates, details, reference numbers, materials purchased, advertising, utilities, wages and total payments. Record all cash payments for the week in the appropriate columns and add the columns.
   c. Use the information from the journals to **create** an income statement for the week for this business.
   d. Use the same information to **create** a cash flow statement for this business.
   e. **Explain** whether you think the business has had a successful week. Give reasons for your answer.

22.4 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 5	3, 4, 6	7, 8

REMEMBER AND UNDERSTAND

1. **Identify** the false statement.
   A. A cash inflow is cash coming into the business.
   B. A cash outflow is cash going out of the business to pay for costs.
   C. Cash inflows are payments and cash outflows are receipts.
   D. All of the above
2. **Match** the terms with their definitions by placing the correct letters in the left column of the table below.
   a. Gross profit
   b. Net profit
   c. Cost of goods sold
   d. Cash journal

A list of transactions recorded in the order in which they occurred
The amount paid for goods that were resold after purchase, or for raw materials used to produce goods for sale
The final profit figure, calculated by subtracting operating expenses from gross profit
The amount of profit gained from selling goods to the public, calculated by subtracting the cost of goods sold from the revenue gained by selling those goods

3. **Explain** the purpose of an income statement for a business owner.
4. **Identify** what a summary of the money spent by a business on a regular basis to generate sales is called.
5. **State** whether the following is True or False. A cash flow statement allows the business owner to calculate the level of profit.

ANALYSE AND APPLY

6. **Describe**, using an example, what is meant by sales revenue.
7. **Explain** why a business owner should keep financial records.
8. **Distinguish** between a cash flow statement and an income statement.

Answers and sample responses for this topic are available online.

LESSON 22.5 Aboriginal and Torres Strait Islander communities in the market

LEARNING INTENTION

By the end of this lesson you should be able to **describe** how Aboriginal and Torres Strait Islander businesses and entrepreneurs develop opportunities in the market.

Tune in

With so many different Aboriginal and Torres Strait Islander groups within Australia, confirming the authenticity of a piece of creative work (dance, art, musical instruments, recipe) can be challenging. There are many counterfeit artists claiming to be from an Aboriginal and Torres Strait Islander background but are simply not.

1. **Identify three reasons why a non-Indigenous person might sell Aboriginal and Torres Strait Islander art.**
2. **Look at FIGURE 1 and explain why you think fake art harms culture.**
3. **Discuss the reasons why a purchaser should know if what they are buying is authentic and not a counterfeit product.**
4. **Reflect on why you think Aboriginal and Torres Strait Islander artists should have their works protected by copyright law.**

FIGURE 1 Fake art, such as these boomerangs being sold in Bali, misappropriates Aboriginal and Torres Strait Islander cultures.

22.5.1 Pre-colonisation trading

Trade played an essential role in Aboriginal and Torres Strait Islander life before British colonisation. Extensive trade routes allowed the exchange of goods, information, technologies and culture across vast distances. Coastal communities traded abalone for both food and tools, while animal skins and artifacts with cultural significance were also commonly exchanged. Possum-skin cloaks, respected symbols worn by leaders, exemplified this trade.

Technologies like hunting techniques were shared to symbolise peaceful intent between groups. Most interactions were amicable, with one group passing through another's territory without conflict. This bartering system, effective for thousands of years, formed the basis of Indigenous economy, promoting equality and respect and preventing any one nation from becoming overly wealthy. The Aboriginal and Torres Strait Islander Peoples valued land for survival and sustenance rather than ownership, fostering a deep respect and connection to it.

22.5.2 Aboriginal and Torres Strait Islander business support

The Aboriginal and Torres Strait Islander business sector is growing at a pace of around four per cent per year, fuelled by growing demand. Aboriginal and Torres Strait Islander businesses are often established with a not-for-profit incentive. Rather, these businesses focus on maintaining community and traditions and helping others. Many Aboriginal and Torres Strait Islander entrepreneurs have found a **niche market** in the areas of tourism, art, fashion, natural skin and beauty products, and cuisine. The latter is linked to cultural food tours and experiences.

Partnerships and cooperatives

Many initiatives aim to assist Aboriginal and Torres Strait Islander entrepreneurs by connecting them with like-minded organisations. Partnerships are formed when non-Indigenous businesses collaborate with these entrepreneurs to raise awareness, link with industry suppliers, or choose them as preferred suppliers through 'partnership contracts'. This type of partnership is about cooperation rather than a formal legal structure.

FIGURE 2 Many Aboriginal and Torres Strait Islander artists sell their artworks.

A **cooperative** is a business model that favours democratic ownership and control by its users or customers. This appeals to some Aboriginal and Torres Strait Islander entrepreneurs as it allows business growth while retaining a community focus. Cooperatives are typically owned by employees and/or customers, ensuring that all members benefit from the business's success.

For example, the Murray Valley Aboriginal Cooperative (established in 1974) is an example of a not-for-profit organisation that provides a diverse range of programs such as childcare, kindergarten, health, medical, wellbeing, housing and aged care for Aboriginal people in Robinvale.

22.5.3 Aboriginal and Torres Strait Islander businesses and contemporary markets

As we have already learned, Aboriginal and Torres Strait Islander communities participate in contemporary markets. Like all entrepreneurs and businesses, they continue to produce, buy and sell goods and services. However, as stated previously, many Aboriginal and Torres Strait Islander entrepreneurs tend to approach marketing, employment and social contribution in their own unique ways. Many Aboriginal and Torres Strait Islander businesses would consider themselves strongly as social traders. They might build their businesses with a profit for purpose and be driven by a public or community cause (be it social, environmental, cultural or economic) which aims to make the world a better place.

SkillBuilder discussion

Investigating

Haus Of Dizzy, founded by Kristy Dickinson, a proud Wiradjuri woman with 20 years of jewellery-making experience, emerged in 2015. Her vibrant jewellery has been worn by celebrities at red carpet events. Kristy collaborates with not-for-profits like AYCC and Djirra, promoting social justice through her work.

1. Investigate and describe the types of items that Haus Of Dizzy sells.
2. What personal values does Kristy Dickinson, founder of Haus Of Dizzy, have? Use your investigation to help answer this.

Connection to Country

Aboriginal and Torres Strait Islander entrepreneurs deeply value their connection to Country, which reflects a sense of belonging and identity. This spiritual bond influences their business practices, ensuring care and responsibility for the land.

Reece Dumbell and Dean Sardellis, co-founders of the Cameron Wellness Centre, embody this connection. Their values include family, community, trust and respect. Reece, a proud Minang Jupa Galk man, has been in the fitness industry since 2009. Motivated by helping people with disabilities, he and Dean founded the centre after being introduced by their wives.

They maintain their connection by hiring staff knowledgeable about Aboriginal and Torres Strait Islander cultures and offering cultural immersion training. New staff engage with local traditional owners to learn about cultural sites, community, and history. 'We ensure cultural fit in our recruitment to align with our ethos at the Cameron Wellness Centre,' said Reece.

22.5 SkillBuilder activity **INVESTIGATING**

Investigate two or three Aboriginal and Torres Strait Islander artists and see what they are doing to combat counterfeit production of their works.

1. **Select** one or two artists and find their websites.
2. **Consider** the questions below and **summarise** the information into a list or table.
   - Where are they from?
   - What type of art do they create?
   - How do they sell it?
3. **Describe** how they confirm that they are an authentic Aboriginal and Torres Strait Islander seller.

22.5 Exercise

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Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 2, 3	4, 6, 9	5, 7, 8

REMEMBER AND UNDERSTAND

1. Aboriginal and Torres Strait Islander businesses are mostly:
   A. profit-seeking enterprises.
   B. charities.
   C. community-focused.
   D. corporations.
2. **Explain** how an Aboriginal and Torres Strait Islander business might find a partnership useful.
3. A cooperative can be defined as a business model based on the idea of _____ ownership and _____ by the people who use the business.
4. **Outline** why an Aboriginal and Torres Strait Islander entrepreneur would create a business that supports a local community.
5. **Explain** why it is important for Aboriginal and Torres Strait Islander businesses to be connected to Country.

ANALYSE AND APPLY

6. a. **Identify** an Aboriginal and Torres Strait Islander-owned and -operated business from this lesson.
   b. **Explain** one benefit that this business brings to the local community.
7. **Explain** one benefit for an Aboriginal and Torres Strait Islander entrepreneur of entering a partnership agreement with a business.

EVALUATE AND COMMUNICATE

8. Aboriginal and Torres Strait Islander entrepreneurs operate businesses which may supply to niche markets. **Determine** what a niche market is and **propose** why a niche market is a good market to sell goods or services to.
9. **Explain** how Aboriginal and Torres Strait Islander business owners communicate the importance of their connection to Country through their business ventures.

Answers and sample responses for this topic are available online.

LESSON 22.6 What factors influence business opportunities?

LEARNING INTENTION

By the end of this lesson you should be able to **explain** which external factors influence business opportunities.

Tune in

Businesses can target specific groups of people when marketing their products.

FIGURE 1 Who is being targeted by this advertisement?

1. **Consider FIGURE 1. If it was an advertisement for a gym, who would it be targeting? What would their age be? What would be their income level and lifestyle? Where would the gym be located and how much might it charge for membership?**
2. **Think of a product that a business could produce. It could be an existing product like a chocolate bar, sports drink or even a car.**
3. **Describe the age of the person who might buy this product. What might their income level be? Where might a person purchase this product? How much might it cost?**

22.6.1 External factors influencing opportunities

Businesses are always searching for opportunities, including ideas for new products, ways to attract new customers and more efficient methods of running the business. Many factors influence opportunities for businesses, and these can be classed as external and internal factors.

FIGURE 2 There are multiple external factors that influence businesses. These factors occur outside of the business and the business has no real control over them.

In this lesson we will consider external factors that influence business opportunities in more detail.

Demographics

Being aware of **demographics** can create opportunities for businesses. Demographics are characteristics or statistics relating to the population, including age, gender, ethnicity, employment, income and education. Businesses can use this information to work out what products consumers prefer or to determine their buying behaviours.

SkillBuilder discussion

Investigating

1. Investigate what the word *demographic* means.
2. What does **FIGURE 3** represent in the context of the term *demographic*?
3. What are some examples of products that might be more appealing to an older demographic compared to a younger demographic?

FIGURE 3 Looking at demographics can allow a business to identify target markets for their products.

The age of a country's population can influence business opportunities. The products that a business sells will usually appeal to a certain age group. The Australian population is ageing, which means that there is more demand for health services, further education and training, and travel. Some businesses may choose to focus on these opportunities or to target their products at younger consumers. People aged under 35 are more likely to be the first to purchase the latest versions of technologies such as mobile phones, games consoles and televisions.

Income

Income can affect business opportunities. The products that a business sells will usually appeal to a certain income group. A premium product, such as designer clothing, will normally appeal to higher-income groups. Lower-income groups tend to purchase less expensive products. A business owner may decide to focus on higher-income groups by starting a boutique fashion store or on lower-income groups by opening a discount fashion store.

Competition

Competition can make life difficult for a business. Depending on the market the business is operating in, it may have several or very few competitors. Competition can drive prices down and can restrict the opportunity to make profit.

However, competition can also create opportunities for businesses. It can force a business to improve the way it does things or to innovate, either through using technology, altering the product or by improving customer service. Competition can force a business to examine its target market closely to make sure that it is selling to the right consumers and perhaps to change the group of customers it is attempting to sell to.

Government policy

The government can affect opportunities for businesses through several direct and indirect ways. Government policy to restrict the sale of certain items such as tobacco products will influence what a business can produce. In other ways, government policy can result in changes in the economy. Lowering interest rates may cause consumers to spend more money and make larger purchases, resulting in increased sales for some businesses.

FIGURE 4 Competing supermarkets Coles and Woolworths are often situated close together and are trying to attract the same customers.

Societal attitudes

Societal attitudes reflect how groups think or feel about something. These collective feelings toward products can influence business decisions and opportunities. For instance, as awareness of climate change grows, consumers are increasingly mindful of their purchases. Society now values 'greener' products that are organic and locally grown, reflecting environmental consciousness.

SkillBuilder discussion

Communicating

1. Describe the different reasons why some people check labels on food items before they buy.
2. What would you consider to be a societal trend when it comes to food or drink items?

FIGURE 5 Society's attitudes about products may change over time, depending on what information they have.

Trends of the target market

To identify its target market, a business segments or splits the market up based on demographics, geography, behaviour, and psychographics. For example, a car-product business may target 30–50-year-olds in suburban areas with limited public transport. A gourmet sandwich business might focus on 25–50-year-olds working in the city who prefer healthy lunches. Defining a target market helps determine product demand and profitability.

22.6.2 Internal factors influencing business opportunities

While a business does not have control over its external environment, it will have some control over its internal factors, and these factors themselves can influence business opportunities. These internal factors range from decisions about the product, locations, resources and business culture. Businesses that can respond to opportunities quickly are often the most successful.

Product

Businesses need to respond and change their products to suit changing consumer needs and wants. Uber Eats is a good example of a business that has expanded its service offering from a ride-sharing service to a food delivery service.

After identifying opportunities in the market, a business owner will need to respond to those opportunities in some way. This may involve developing new products to satisfy demand or changing the way the business delivers its products or services to consumers.

A business might respond to opportunities in the market by developing a new product to satisfy demand. **Product development** can involve modifying an existing product or the way in which it is presented, or creating an entirely new product that meets the demands of a newly defined customer or market. Starting with an idea for a new product or an idea to modify a product, a business will go through a series of steps to bring the product to market.

SkillBuilder discussion

Evaluating, concluding and decision making

1. Uber Eats officially launched in Australia in 2016. Do you think it was a 'new' product at the time?
2. What is the opportunity that Uber Eats took advantage of?

FIGURE 6 Uber Eats is an example of a successful response to a business opportunity.

Location

The location a business chooses can create opportunities or restrict them, according to the nature of the business. A business needs to consider how important passing trade will be, whether visibility is important, how important access to resources will be, or whether cost will be the most important factor.

For example, a business that is hoping to sell to young people or young families would find limited opportunities if it was in an area whose population has an average age of over 60; a boutique fashion store would struggle to find customers if it was in an industrial area; and a business that manufactures goods might encounter difficulties if it was in an area that its suppliers could not access easily.

Resource management

In simple terms, resource management is about ensuring that the organisation's resources are where you need them most. This means that physical resources such as materials or ingredients are ready for manufacture or that people, a business's employees, are also in the right place. This might refer to a particular business having enough employees to serve customers or a production facility having enough staff to be able to manufacture the number of items it needs to. If any of these are lacking, a business will find it very difficult to respond to opportunities.

Business culture

Business culture is *how* you do what you do in the workplace. Business cultures include all the formal and informal behaviours and even the values of a business's employees. These things all create an experience for employees and customers. Some businesses use culture to their advantage to seize opportunities. For example, a business may be well known for creating new ideas and products and it may have a reputation for creative staff. This kind of business may be able to respond quickly to an opportunity to meet a new need in the market.

FIGURE 7 Employees of Google are known for being innovative and the company has a flexible working culture.

22.6 SkillBuilder activity QUESTIONING AND RESEARCHING, EVALUATING, CONCLUDING AND DECISION-MAKING

Work in pairs to complete the following activities:

1. For each of the target market groups below, **propose** an opportunity (a product or a business idea) that would cater for their needs.
   - **a.** High-income earners
   - **b.** New parents
   - **c.** Diet-conscious consumers
   - **d.** Well-educated people
   - **e.** Young and active students

2. Select a business in your local area. **Describe** whether the business has an advantage or disadvantage in its location regarding:
   - how visible it is to potential customers
   - cost (including the likely rent or costs of transportation)
   - how close it is to suppliers and customers
   - how close it is to competitors.

22.6 Exercise

learnon

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
2, 3, 5	1, 4, 6, 10	7, 8, 9

REMEMBER AND UNDERSTAND

1. **Explain** how the following factors influence business opportunities:
   a. Target market
   b. Competition
   c. Location
2. **Determine** whether the following is True or False. An external factor influencing a business is something that can be controlled by the business.
3. An internal factor influencing a business can be best described as:
   A. a factor that the business will have some control over, such as business culture or location.
   B. a factor that the business cannot control, such as the economy or government policy.
4. **Define** what is meant by *societal attitude*.
5. **Complete** the following sentence:
   Businesses should respond and change their _____ to match changing consumer needs and _____.
   A business that does this is more likely to be _____.

ANALYSE AND APPLY

6. a. **Explain** what is meant by *product development* and how it helps a business respond to opportunities.
   b. **Provide** an example of product development that you are familiar with.
7. **Outline** what is meant by the term *demographics* and explain how this is related to business opportunities.
8. **Name** one government policy and **outline** how it might affect a business.
9. **Distinguish** between societal attitudes and business culture.

EVALUATE AND COMMUNICATE

10. **Propose** how a business can be successful in a highly competitive market

Answers and sample responses for this topic are available online.

LESSON 22.7 Inquiry: Financial and business decision-making

LEARNING INTENTION

By the end of this lesson you should be able to:

- **identify** processes that individuals and/or businesses use to plan and budget to achieve short-term and long-term financial objectives
- **identify** the different ways that businesses adapt to opportunities in the market and respond to the changing nature of work.

Background

Why is personal, organisational and financial planning for the future important for consumers and businesses? How do different businesses respond to opportunities in the market?

Omari is an electrician. He works full time and has been in his current occupation for five years. Omari earns a fair wage, and he is saving for a deposit on a house. Omari enjoys his job, and his employer is thinking about moving into a new market to repair faulty electrics on solar panels. This is a growing need for homes that have solar panels installed.

Before you begin

Access the **Inquiry rubric** in the digital documents section of the Resources panel to guide you in completing this task at your level. At the end of the inquiry task you can use this rubric to self-assess.

Inquiry steps

You will use two online sources of reference for this inquiry, the Australian Bureau of Statistics and Labour market insights.

Step 1: Questioning and researching

Omari works full time. Use the **Australian Bureau of Statistics** weblink to help you answer the following questions:

a. **Define** what is meant by full-time employment.
b. What is the current rate of unemployment in Australia?
c. What are the average weekly earnings in Australia?

Omari is an electrician. Use the **Labour market insights** weblink to locate the job profile for an electrician.

a. What would Omari's weekly earnings be?
b. What is the average age of an electrician?
c. What percentage of electricians are male?

Step 2: Interpreting and analysing

Omari is saving for a deposit on a house.

a. **Explain** what kind of financial goal this is. Do you think that this is a sensible goal? Explain and justify your answer.
b. Omari's employer wants to enter a new market, repairing solar panels. Why might the business have decided to do this? What influences will the business need to consider before taking the opportunity to enter the new market?
c. **Outline** the two financial reports that Omari's employer might use when planning his new business opportunity.

Step 3: Evaluating, concluding and decision-making

Omari's employer would like him to be a partner in the business.

a. **Explain** what is meant by a partnership.
b. What other forms of business ownership exist?
c. **Outline** the advantages and disadvantages to Omari going into partnership with his employer.

Step 4: Communicating

Present your findings to your class. Advise Omari on what he should do: should he enter the partnership with his employer? Will he still be able to save for a deposit on his house? Is being an electrician a stable profession?

LESSON 22.8 Review

22.8.1 Key knowledge summary

Use this dot point summary to review the content covered in this topic.

22.2 What are short-term personal financial goals?

- Individuals can improve their financial flexibility by saving money, allowing them to avoid debt and be prepared for unexpected expenses.
- Preparing a personal budget can assist us to achieve our financial goals.

22.3 What are long-term personal financial goals?

- Longer-term savings through superannuation contributions, home ownership or investment in shares can provide security for us as we get older and approach retirement age.

22.4 What is business finance?

- Business owners need to keep track of all financial transactions so that they can determine the level of success of the business.
- An important part of any business plan is the financial plan, which allows the business owner to create a budget and keep track of establishment and operating expenses.

22.5 Aboriginal and Torres Strait Islander communities in the market?

- Aboriginal and Torres Strait Islander businesses and entrepreneurs develop opportunities in the market.
- Aboriginal and Torres Strait Islander businesses and entrepreneurs establish partnerships or cooperatives.
- Aboriginal and Torres Strait Islander communities participate in contemporary markets and have distinct approaches to marketing, employment and social contribution.
- Many Aboriginal and Torres Strait Islander businesses and entrepreneurs use connection to Country to make innovations in the production and distribution of goods and services.

22.6 What factors influence business opportunities?

- Business opportunities are influenced by factors including demographics, target market, competition and location.
- A business can respond to opportunities by following a process to develop new products to satisfy demand or by changing the way products are delivered to consumers.

22.7 Inquiry: Financial and business decision-making

- Personal, organisational and financial planning for the future is important for consumers and businesses.
- Different businesses respond in different ways to opportunities in the market.

22.8.2 Key terms

budget an itemised estimate of income and expenses for a given period
cash flow statement cash flow is the movement of money in and out of the business. A cash flow statement can show the net cash flow; this is the money left after money out has been deducted from money in.
competition the outcome of two or more businesses attempting to supply their products to the same group of customers
cooperative a business owned by employees and customers of the business, which operates to benefit its members and society
cost of goods sold the direct cost of the goods that have been sold; for example, the raw materials used to make the product

cost of materials the price paid by the business for the materials used in generating the sales revenue; also known as the costs of goods sold
costs the expenses involved in making a product; some relate to the actual production of the product, others to running the business (e.g. wages and electricity)
current financial position a calculation of what income someone has (money coming in) minus any regular expenses (money out)
demographics characteristics relating to population, especially age, gender, ethnicity, employment, income and education
expenses the regular outgoings of money (money out) that a person may have. This might include rent or a mortgage, grocery bills, energy bills, a loan repayment for a car, and medical bills.
employer the person or business that pays workers for the work they do
employees the people who make the product or provide the service to the customers. Employees have a massive effect on the outcome of the business.
gross wage a person's wage or salary before it is taxed by the government
income the money that a person receives. This can consist of money earnt from employment such as a wage, but it also includes income from other sources.
income statement tells a business owner whether the business has made a profit over a period. It does so by looking at the amount of money earned by selling goods and services, and the business's costs.
long-term goals are personal financial goals that you will want to accomplish in the future e.g. buying a house
niche market a segment of buyers who have a unique need which is met by a business or seller who can supply products that satisfy that need. Buyers in a niche market may be looking for something different than the mainstream consumer.
operating expenses are those costs which are encountered to run the business (such as wages, gas, electricity)
pension your employer pays a percentage of your earnings into your superannuation account, and your superannuation fund invests (or grows) the money until you retire
product development the creation of products with new or different characteristics that offer new or additional benefits to customers
revenue refers to receipts, otherwise known as revenue, that occur when a business receives money; this is usually when a customer purchases something to come
sales revenue the amount of money earned by selling goods and services
short-term goals are things that we want to do within the next couple of months or even within the year; this might include a plan to buy something
superannuation fund how much money a person has in their retirement fund. This will consist of the payments that the person has made from their income, combined with what their employer has contributed.
superannuation or super is the term for retirement funds. Most working Australians pay into a super fund from their income (as wage or salary) and employers make similar regular contributions.

22.8.3 Reflection

Complete the following to reflect on your learning.

Revisit the inquiry questions posed in the Overview:

Why is financial planning, including budgeting and achieving personal financial objectives important? What financial decisions are businesses making? And how do they respond to a changing market?

1. Now that you have completed this topic, what is your view on these questions? Discuss with a partner. Has your learning in this topic changed your view? If so, how?
2. Write a paragraph in response to the inquiry questions, outlining your views.

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Post-test	Online Post-test
eWorkbooks	Customisable worksheets for this topic Reflection
Digital document	Key terms glossary

22.8 Review exercise

Learning pathways

LEVEL 1	LEVEL 2	LEVEL 3
1, 3, 4, 5, 8, 14	2, 6, 7, 9, 10, 13	11, 12, 15

REMEMBER AND UNDERSTAND

1. Revenue is calculated by:
   A. selling price × costs.
   B. costs − selling price.
   C. selling price × number of sales.
   D. selling price − costs.
2. Business opportunities are influenced by factors including:
   A. costs, revenue, profit and loss.
   B. production and processes.
   C. budgets.
   D. demographics, target market, competition and location.
3. A target market is:
   A. a specific group of customers that the business is aiming its product at.
   B. an amount of sales that needs to be made.
   C. a projection for a budget.
   D. all of the above.
4. In the past decade, the Australian industry that has experienced a significant decrease in the proportion of the workforce that it employs is:
   A. retail trade.
   B. construction.
   C. manufacturing.
   D. health care and social assistance.
5. Technological advances enable businesses to:
   A. create new markets.
   B. communicate instantly.
   C. produce better products.
   D. do all of the above.
6. Identify the correct formula for gross profit.
   A. revenue − profit
   B. costs − revenue
   C. revenue − costs of materials
   D. net profit − cost of goods sold

7. Aboriginal and Torres Strait Islander entrepreneurs will often operate businesses as social enterprises. Identify the benefit of this.
   A. These enterprises can raise awareness of local traditions and support local communities.
   B. These enterprises can reduce access to education and training programs.
   C. The businesses are not supported by the government.
   D. All of the above
8. People work for self-satisfaction. What does this mean?
   A. A person is satisfied with the money they earn.
   B. A person is proud of their achievements in the workplace.
   C. A person is satisfied with their working conditions.
   D. Self-satisfaction is the feeling of enjoyment we get from friends and family.
9. A niche market is one which:
   A. has a large amount of customers.
   B. has a smaller specific group of customers with a unique need.
   C. has common products for everyone.
   D. has very expensive products.
10. Individuals, businesses and governments create budgets. These are:
   A. goals for setting up a new business.
   B. plans of how much money you may spend.
   C. the amount left over once costs have been taken away from revenue.
   D. a forecast of money coming in and money going out.

ANALYSE AND APPLY

11. **Describe** the opportunity that global markets present to businesses.
12. **Analyse** the importance of financial planning for a new business.
13. **Explain** what options businesses have if their costs unexpectedly increase.

EVALUATE AND COMMUNICATE

14. a. **List** three personal financial goals that you may have as a working adult.
   b. A common goal is to want to purchase a house. **Discuss** the risk that comes with buying a house.
15. **Explain** the concept of personal budgeting. Propose how you might use this type of budgeting when you are working in a full-time job?

Answers and sample responses for this topic are available online.

GLOSSARY

abrogate to pass an Act of Parliament; to cancel or abolish a law (precedent) made by the courts
absolute dating techniques methods used to assess the age of something (e.g. radiocarbon dating, tree-ring dating)
accused the party in a criminal trial against whom an action has been brought
Act a law passed by parliament
allocate assign resources to different uses within the economy
althing Iceland's parliament; Icelandic governing national assembly formed during the Viking Age, which met once a year
altitude height above sea level
ancient history the period from the beginning of civilisation to the fall of the Roman Empire
aquifer a body of permeable rock below the Earth's surface that contains water, known as groundwater
arable land that can be ploughed for crops
archbishop head bishop
archipelago an area that contains a chain or group of islands scattered in lakes, rivers or the ocean
artefact an object made or changed by humans
artillery large mounted firearms such as the cannon
artisan a skilled worker who produces handmade items
asylum seeker a person whose request for sanctuary has yet to be processed
Australian Constitution the foundational legal document that establishes the framework for the governing of Australia
backwash the movement of water from a broken wave as it runs down a beach returning to the ocean
balance of power the distribution of authority and responsibilities among the three branches of government
balance of probabilities requires reasonable satisfaction that the facts as presented are probably correct and occurred as stated
barbarian uncultured and uncivilised; not Christian
beriberi a disease caused by a lack of vitamin B
berserker Viking warrior who fought naked or near-naked and rushed wildly into battle. The word 'berserk' is derived from this.
beyond reasonable doubt based on evidence, there is no other logical conclusion that can be made other than that the accused is guilty
biased one-sided or prejudiced; seeing something from just one point of view
bill a proposed law that has not yet been agreed to by parliament or received royal assent
billabong a U-shaped body of water created when a wide meander is cut off from the main channel of a river after it changes its course. Also known as an oxbow lake.
binding precedent a decision made in a higher court in the same court hierarchy that must be followed by a lower court where the facts of the cases are similar
bishop a senior member of the clergy; one who governs a diocese, a large church district
biwa a four-stringed Japanese musical instrument
blasphemy any words or actions that were considered disrespectful or insulting towards God or religion, e.g. speaking rudely about religion or denying the existence of God
bloodletting medieval medical practice where blood was deliberately removed using cuts or leeches; commonly used during plagues though it was often harmful
boss metal bulge used as reinforcement in the centre of a shield
breach of contract a situation where a legally binding agreement is not honoured by one or more of the parties to the contract
bronze metal alloy, mainly of copper and tin

bubonic plague the commonest form of plague in humans, characterised by fever, delirium, and the formation of buboes
Buddhist to do with Buddhism; a follower of Buddhism
budget estimates of all government income to be raised by taxes and other charges, and the planned spending of that income, within any given year
burden of proof the legal principle describing who has to prove a case in court. In a criminal trial, this burden is on the prosecution.
bushidō the way of the warrior; the rules that prescribed correct behaviour for all samurai
business any activity conducted by an individual or individuals to produce and sell goods and services to make a profit
Cabinet the main group of parliamentary members from the governing party
calligraphy the art of beautiful handwriting
capital growth an increase in the value of shares or property over time
capitalism economic system where production and trade are privately owned
capitalist spirit way of thinking behind capitalism
cardinal a member of the Pope's Council, or Sacred College; has the power to elect the Pope from among his own group
cash flow statement cash flow is the movement of money in and out of a business. A cash flow statement can show the net cash flow; this is the money left after money out has been deducted from money in.
cathedral main church of a diocese; contains the bishop's throne
cause and consequence the concept that every historical event will have a cause, and every event or action is likely to be the cause of subsequent effects or consequences
centralised control of a country from one central location
change the process by which places, environments or spatial patterns alter over time. In Geography, change can be natural (like erosion or climate change) or human-made (like urban development or deforestation).
chastity choosing not to have sexual relationships
chronicle a record of events as they happened, usually written by a person who was present at the time they occurred
chronology a record of past events in order of time, from ancient Greek *chronos* (time) and *logos* (word)
city-state a city that with its surrounding territory forms an independent state
civil war a war between two competing groups within one country
civilisations societies that have towns and features such as complex forms of government and religion
clan a large group of closely related people
clergy officials of the Church
codex a pictorial book
codified refers to laws that have been collected and organised, usually in written form
coexist to live together at the same time in the same place
commercial revolution a period of major economic change in Europe between the 11th and 18th centuries, where trade expanded, banking grew, and new business practices developed
common law law developed by judges through the decisions of courts
competition the outcome of two or more businesses attempting to supply their products to the same group of customers
compost a mixture of various types of decaying organic matter such as dung and dead leaves
concentric having a common centre
confidence the level of support that the government has from the parliament, which is necessary for the government to remain in power
conquistador one of the Spanish conquerors of Mexico in the sixteenth century
conscript a person ordered by the government to do compulsory military duty
constructive waves waves that deposit sand on the beach
contemporary issues the diverse range of current events and issues that are facing society

contestability when particular interpretations of the past are open to debate
continuity and change the concept that while many changes occur over time, some things remain constant
conurbation area when cities merge to form one continuous urban area
convection current a current created when a fluid is heated, making it less dense and causing it to rise through surrounding fluid and to sink if it is cooled; a steady source of heat can start a continuous current flow
converging plate a tectonic boundary where two plates are moving towards each other
cooperative a business owned by employees and customers of the business, which operates to benefit its members and society
cost of goods sold the direct cost of the goods that have been sold; for example, the raw materials used to make the product
cost of materials the price paid by the business for the materials used in generating the sales revenue; also known as the costs of goods sold
costs the expenses involved in making a product; some relate to the actual production of the product, others to running the business (e.g. wages and electricity)
craftsmen skilled workers who made goods by hand, such as blacksmiths, weavers and shoemakers
Crown the King's authority in the Australian parliament, represented by the governor-general at the federal level and a governor at the state level
cultural homogenisation the diversity of unique national identities is being replaced by a uniform identity for all
cultural tokenism when demonstrations of national identity lose meaning, becoming token gestures or novelties
cultural relating to the ideas, customs and social behaviour of a society
current financial position a calculation of what income someone has (money coming in) minus any regular expenses (money going out)
curtain wall outer wall surrounding an inner wall in a castle
cuspate spits projections of a beach into an enclosed or semi-enclosed lagoon
customary law rules for behaviour developed by and for Aboriginal and Torres Strait Islander Peoples
daimyō great feudal lord of Japan during the Classical and shōgunate periods
day labourers people who worked for daily wages, often doing unskilled jobs on farms or in towns, without long-term employment
decimate to kill, destroy or remove a large proportion of something
defamation unlawful damage to a person's good reputation through written or verbal statements
defendant the party in a civil trial against whom an action has been brought
deliberative having the power to make decisions
democracy a form of government in which the people determine how they will be governed
democratic supporting democracy, or a system of government where supreme power is vested in the people and exercised directly by them or by their elected representatives under a free electoral system
demographics characteristics relating to population, especially age, gender, ethnicity, employment, income and education
deposition the laying down of material carried by rivers, wind, ice and ocean currents
destructive wave a large powerful storm wave that has a strong backwash
direct taxation a type of tax that is paid straight to the government by individuals or businesses on their income or profits. For example, income tax is a direct tax because it is taken directly from a person's earnings.
dispute an argument
dissent disagreeing with a decision, opinion, or set of beliefs, and expressing this disagreement
divergent plate a tectonic boundary where two plates are moving away from each other and new continental crust is forming from magma that rises to the Earth's surface between the two
dividends company profits paid to shareholders, either in cash or as more shares
doctrine of Mahomet the Muslim faith, following Mohammed's teachings

domain the territory ruled by a daimyō, including the farming and fishing villages within it
dormant inactive or sleeping, with the potential to become active at any time
downstream nearer the mouth of a river, or going in the same direction as the current
drainage basin an area of land that feeds a river with water, or the whole area of land that is drained by a river and its tributaries
duke in England, a lord whose status placed him just below that of a prince; elsewhere in Europe, a ruler of a small state called a duchy or dukedom
ecological footprint the amount of productive land needed on average by each person in a selected area for food, water, transport, housing and waste management
economic scarcity the economic problem of having unlimited needs and wants, but limited resources to satisfy them
economic system a way of organising the production and distribution of the nation's goods, services and incomes
economics a social science (study of human behaviour) that analyses the decisions made by individuals, businesses and governments about how limited resources are used to satisfy society's unlimited needs and wants
economy a system established to determine what to produce, how to produce and to whom production will be distributed
ecosystem an interconnected community of plants, animals and other organisms
electorate an area of Australia that elects one member to parliament
emigrants people exiting their country of origin
employees the people who make the product or provide the service to the customers. Employees have a massive effect on the outcome of a business.
employer the person or business that pays workers for the work they do
endemic normally and regularly found in a particular location or environment
entrepreneur a person who sets up a business or businesses, taking on financial risks in the hope of profit
environment the natural and human surroundings in which people, plants and animals live, including ecosystems, landscapes and built environments.
epicentre the point on the Earth's surface directly above the focus of an earthquake
erosion the wearing away and removal of soil and rock by natural elements, such as wind and water, and by human activity
escarpment a steep slope or cliff formed by erosion or vertical movement of the Earth's crust along a fault line
estuary the wide part of a river at the place where it joins the sea
evaluations the process of assessing something to determine its value, effectiveness or impact
evidence information that indicates whether something is true or really happened
excommunicated banned from Church membership
expenses the regular outgoings of money (money out) that a person may have. This might include rent or a mortgage, grocery bills, energy bills, a loan repayment for a car, and medical bills.
export a good or services sold by local businesses to overseas consumers
fallow when a field was left for a period without being sown in order to restore its fertility through the nutrients in the soil
fault plane the area of a tectonic plate that moves vertically as a result of an earthquake
fault an area on the Earth's surface that has a fracture; a fault lies at the major boundaries between Earth's tectonic plates
fetch the distance over which the wind blows across the surface of water. A long fetch results in larger, more powerful waves, whereas a short fetch results in smaller waves.
feudal aristocracy (nobles) the highest-ranking group in medieval society; powerful landowners who gained their status through birth and service to royalty
feudalism social order in medieval Europe

financial literacy the ability to make informed judgements and to take effective decisions regarding the use and management of money
financial institution any organisation that takes deposits from those with surplus funds, and makes those funds available to borrowers
fjord long, narrow inlet flanked by high cliffs and slopes
flax plant cultivated for its seeds and fibres, which can be used to produce many things such as textiles
floodplain an area of low-lying ground adjacent to a river, formed mainly of river sediments and subject to flooding
fly-in fly-out (FIFO) a system in which workers fly to work, in places such as remote mines, and after a week or more fly back to their home elsewhere
focus the point where the sudden movement of an earthquake begins
Franks people of a group of a Germanic nation who ruled in western Europe from the sixth century CE
geld a form of land tax
geothermal energy energy derived from the heat in the Earth's interior
glacier a large body of ice, formed by an accumulation of snow, that flows downhill under the pressure of its own weight
glaze a substance fused onto pottery to give it a glass-like appearance
global citizenship being aware of the interconnectedness of the globalised world and acting in a way that promotes this notion
globalisation the process of interacting with markets in other countries around the world, as part of an integrated global economic system
gross wage a person's wage or salary before it is taxed by the government
groundwater water that seeps into soil and gaps in rocks
Gulf Stream great warm current of water flowing from the Caribbean Sea all the way to northern Europe
hard engineering a coastal management technique that involves using physical structures to control the effects of natural processes
heathen one who is not of one's own religion, and is therefore seen as being uncivilised
hemp plant favoured for its tough fibre, useful in the making of rope
hereditary passed from parent to child
heresy opinion that challenged or differed from that of the Roman Catholic Church or the less tolerant Protestant churches
heretic one who rejects the teachings of the Church
heretic person rejecting Church teachings
heritage everything that has come down to us from the past
homicide the killing of one person by another person
hostage a person kept for security
hotspot an area on the Earth's surface where the crust is quite thin and volcanic activity can sometimes occur, even though it is not at a plate margin
household sector a term used by economists to refer to the total of all consumers in the economy
humanist belief centred on human interests or values
hypothesis a theory or possible explanation
idolatry worship of idols
illumination hand-painted illustration in a medieval book
immigrants people 'moving into' their destination country
import goods or services purchased by local consumers from overseas businesses
income statement tells a business owner whether the business has made a profit over a period. It does so by looking at the amount of money earned by selling goods and services, and the business's costs.
income the money that a person receives. This can consist of money earnt from employment such as a wage, but it also includes income from other sources.
indictable offence a serious criminal offence such as murder or armed robbery

indirect taxation a type of tax that is added to the price of goods and services and paid to the government by the seller. Consumers pay this tax when they buy things. For example, the Goods and Services Tax (GST) is an indirect tax included in the price of most items.
indulgence a way to reduce the amount of punishment one has to undergo for (forgiven) sins
infrastructure the facilities, services and installations needed for a society to function, such as transportation and communications systems, water and power lines
Inquisition Catholic body that tried people for heresy
inselberg an isolated hill, knob, ridge, outcrop or small mountain that rises sharply from the surrounding landscape
interconnection the way people, places and environments are linked to each other through natural processes, trade, migration, culture and technology.
interest a charge made for the use of money that has been deposited or borrowed
intermittent describes a stream that does not always flow
internal displacement when people are forced to leave their homes due to conflict or environmental disasters, but remain within their country's borders
internal migration migration within a country
investment the direction of money into the purchase of equipment or premises for the establishment of a new business, or the expansion of an existing business
jury in a criminal trial, a randomly selected group of people who decide the guilt or innocence of an accused person
kabuki a colourful form of theatre combining play-acting, dance and music
kana a writing system that represents Japanese syllables
keel lowest timber running along the length of a vessel, and upon which the framework of the whole boat is built
keep innermost tower of a castle
kiln an oven used at high temperatures to heat and harden ceramic items
knarr a Viking trading ship
knights warriors who followed a code of honour called chivalry; often served nobles or royalty for land or money
labour the human skills and effort required to produce goods and services
lance a long wooden shaft with a steel point used as a weapon by mounted knights
landslide a rapid movement of rocks, soil and vegetation down a slope, sometimes caused by an earthquake or by excessive rain
Latin the language of ancient Rome and its empire
laws the system of rules that Australia recognises as regulating the actions of its citizens, which it may enforce by the imposition of penalties and sanctions
leaching a process that occurs in areas of high rainfall; water runs through the soil, dissolving minerals and carrying them into the subsoil. Similar to a coffee pot where water drips through coffee grounds.
legislation a law made by parliament
liable legally responsible for a civil wrong
linen cloth made from flax
liquefaction transformation of soil into a fluid, which occurs when vibrations created by an earthquake, or water pressure in a soil mass, cause the soil particles to lose contact with one another and become unstable; for this to happen, the spaces between soil particles must be saturated or near saturated
literate able to read and write
lithosphere the crust and upper mantle of the Earth
long-term goals are personal financial goals that you will want to accomplish in the future e.g. buying a house
longhouse a Viking farmhouse with a curved shape like an upturned boat. Particularly large longhouses meant for 30–50 people are often called halls.
longphort a fortified base

longshore drift a process by which material is moved along a beach in the same direction as the prevailing wind
lords aristocratic landowners in feudal times
lymph node lump of tissue that helps the body fight infection; part of the immune system
mace iron-headed club
magistrate a court official who hears cases in the lowest court in the legal system
mail armour comprising chain links
manslaughter the accidental or unintentional killing of one person by another person
mantle the layer of the Earth between the crust and the core
marginalisation treatment of a group of people which relegates them to the fringes of society
market capitalist economy an economic system that relies on the market to allocate resources based on the actions of consumers and producers, and where resources are generally owned by private individuals and businesses
market the place where goods, services or resources are exchanged between buyers and sellers
martyr someone who dies for their faith or is recognised by their religion in death
mass Roman Catholic Church service
meander a winding curve or bend in a river
megacity a very large city with a population of at least 10 million people
megaregions megacities merge to form these
mercenary soldier fighting for money, not ideals
miasma unpleasant smells or fumes thought to be the cause of disease in medieval times
microclimate specific atmospheric conditions within a small area
middle class a social class between the privileged nobility and the poor peasants. It typically comprised merchants and wealthier craftspeople.
migrant a person who leaves their own country to go and live in another
migration moving from one country to go and live in another
missionary a person sent on a religious mission, especially one to promote Christianity in a foreign country
moat water-filled defensive ditch surrounding a castle
monochrome varying tones of a single colour, usually black and grey
monopoly an organisation or group that has complete control of something
mortgage loan a loan advanced to allow a person to buy a house or other property, with the property itself as security for the loan. This means the bank or other lender can take possession of the property if the borrower fails to make the regular payments.
motte a mound upon which a castle was built
musket a muzzle-loading gun with a long barrel
national identity the parts of a society that make people feel like they belong, such as shared values or sense of identity
needs goods or services that consumers consider necessary to maintain their standard of living
negligence a situation where a person breaches a duty to exercise reasonable care to avoid a foreseeable risk, resulting in another person being injured or suffering a risk of injury
New World a term for the Americas during the early modern period (the 16th and 17th centuries)
niche market a segment of buyers who have a unique need which is met by a business or seller who can supply products that satisfy that need. Buyers in a niche market may be looking for something different than the mainstream consumer.
nobles rich and powerful landowners who held power over others through the feudal system
Normandy now a French province, in the Middle Ages it was a dukedom in northern France
nuisance interference with someone's enjoyment of public or private property
nun member of a closed community of women living under religious vows and rules
oath breaker someone who goes back on their word
operating expenses are those costs which are encountered to run the business (such as wages, gas, electricity)

opportunity cost the next best alternative given up whenever a choice is made
opposition the main political party in the lower house of parliament that's not in power
origami the art of folding paper into different shapes and designs
orographic rainfall occurs when a topographic barrier such as a mountain blocks the path of a movement of air horizontally. This forces the air upward where it cools, thus increasing the likelihood of rain.
oxbow lake a U-shaped body of water created when a wide meander is cut off from the main channel of a river after it changes its course. In Australia it is referred to as a billabong.
pagan someone who is neither Christian, Jewish or Muslim; one who worships many gods, or none
pagoda a Hindu or Buddhist temple, typically in the form of a many-tiered tower
palanquin a type of couch for transporting passengers, with long poles on each side so that servants could carry it on their shoulders
palisade a tall fence made of pointed timber stakes driven into the ground
pandemic widespread across a large region
Pangaea the name given to all the landmass of the Earth before it split into Laurasia and Gondwana, which over time became the continents we know today
patricians wealthy and influential families in medieval towns or cities, often involved in politics and trade
peasants farmers who worked the land. Most were poor and either rented land or worked for landowners. Some were serfs, tied to the land.
peninsula land jutting out into the sea
pension your employer pays a percentage of your earnings into your superannuation account, and your superannuation fund invests (or grows) the money until you retire
percolate filter through porous material such as soil
perennial describes a stream that flows all year
permafrost a layer beneath the surface of the soil where the ground is permanently frozen
persecution oppression or punishment of a person or group of people, usually because of their religion
perspectives point of view or attitude
persuasive precedent a decision made in a lower court or a court in a different hierarchy that does not have to be followed but may be used as a guide
petition a formal request for change signed by many people
phalanx a body of foot soldiers in close battle order
physical processes continuing and naturally occurring actions such as wind and rain
pigment a natural colouring material made of plant or animal tissue
pike long spear-like weapon carried by foot soldiers
place a specific location on Earth that has unique physical and human characteristics, making it meaningful to people
plaintiff the person who commences a legal action in civil law
plateau an extensive area of flat land that is higher than the land around it. Plateaus are sometimes referred to as tablelands.
pluralism a system or idea where different groups, beliefs or opinions are accepted and have the right to exist and be heard in society or government
pneumonic plague a severe lung infection caused by the bacterium *Yersinia pestis*
polytheistic the belief in or worship of more than one god
pommel rounded knob at the end of a sword hilt
popular sovereignty the idea that the people have the power to choose their leaders and make decisions through voting
population density the number of people living within one square kilometre of land; it identifies the intensity of land use or how crowded a place is
population distribution the pattern of where people live; population distribution is not even — cities that have high population densities and remote places such as deserts usually have low population densities
precedent a legal principle developed by a court in the process of resolving a dispute

precipitation the different forms in which moisture is returned to the Earth from the atmosphere, most commonly in the form of rain, hail, sleet and snow

prehistory the period before writing was invented

presumption of innocence a person charged with a criminal offence should be treated as innocent, until evidence presented in court proves they are guilty

prevailing wind the main direction from which the wind blows

primary sources objects and documents that were created or written in the period of time that the historian is investigating

primary wave also known as a P-wave; the first waves to hit an area during an earthquake, which cause a sudden jolt

privatise to sell a government-owned provider of goods or services to private investors

product development the creation of products with new or different characteristics that offer new or additional benefits to customers

progressive tax system in theory, people who earn more money pay more income tax

prosecute to take legal action against another person for a criminal offence

pull factor favourable quality or attribute that attracts people to a particular location

push factor unfavourable quality or attribute of a person's current location that drives them to move elsewhere

rain shadow the dry area on the leeward side of a mountain; forms where mountains block rain-bearing winds

reading the formal presentation of a proposed law (Bill) to members of parliament

reconstruction rebuilding or re-making: in archaeology, rebuilding an artefact using archaeological remains as a guide

reeve a magistrate administering law in a village

referendum the process of allowing the people to vote on an important issue that will result in a change to the Australian Constitution

Reformation Era period when Protestant churches emerged

refugee a person who has been forced to leave their country in order to escape war, persecution or natural disaster

regent a person appointed to rule a country if a monarch is too young or ill to do so

regurgitate to vomit, or bring up the contents of the stomach or throat

relative dating techniques methods used to assess whether something is older than something else (e.g. stratigraphy, fluorine dating)

Renaissance period of major changes in art, science and learning

republic a state in which the head of the government is not a ruler who inherits their position, as might a king, queen or emperor

resource allocation relates to decisions about how scarce resources are distributed among producers, and which types of goods and services will be produced to satisfy wants and needs

revenue refers to receipts, otherwise known as revenue, that occur when a business receives money; this is usually when a customer purchases something to come

rift zone a large area of the Earth in which plates of the Earth's crust are moving away from each other, forming an extensive system of fractures and faults

right an entitlement to be treated in a particular way. A legal right is a right that can be enforced by law.

river delta a landform created by deposition of sediment that is carried by a river as the flow leaves its mouth and enters slower-moving or stagnant water. Can take three main shapes: fan shaped, arrow shaped and bird-foot shaped.

robber barons feudal lords who used their castles to control trade routes and charged illegal tolls or robbed travellers

ronin a wandering samurai who had no lord or master

rudder broad wooden or metal piece at the end of a boat used for steering; on a longship, it was a broad oar attached to the tiller

rule of law a legal principle that all citizens are subject to the law and equal before the law. The law applies equally to all citizens regardless of status or wealth.
runes letters of the Scandinavian alphabet based on Roman or Greek letters but modified to be easily carved on wood or stone
sacrament a sacred Christian ceremony, for example, baptism or marriage
saga a medieval Scandinavian tale about exploits and adventures in the life of a hero or his family
sake a Japanese alcoholic drink made from fermented rice; sometimes known as rice wine
sales revenue the amount of money earned by selling goods and services
samurai the warrior class in Japan during the Classical and shōgunate periods
sanctuary protection offered to individuals who were seeking refuge from persecution or punishment. The right of sanctuary was based on the idea that churches and other religious institutions were sacred and provided a safe place for those in need of protection. They were granted temporary protection from arrest, allowing them time to negotiate a settlement for their crime, or seek a pardon.
sanitation facilities provided to remove waste such as sewage and household or business rubbish
scale the ratio that shows how much smaller a map is compared to the real world, e.g. one centimetre on a map equals one kilometre in real life
Scientific Revolution age of major scientific discoveries
sea change movement of people from major cities to live near the coast to achieve a change of lifestyle
secondary sources reconstructions of the past written or created by people living at a time after the period that the historian is studying
secondary wave also known as an S-wave; the waves that arrive at an area after the P-waves, and cause a sustained up-and-down movement
sediment material carried by water
seismic wave a wave of energy that travels through the Earth as a result of an earthquake, explosion or volcanic eruption
self-sufficient able to provide for its own needs
separation of powers the dividing of responsibilities and powers of government
seppuku a form of ritual suicide, carried out by disembowelling oneself (cutting open the abdomen) with a sword
septicaemic plague a plague wherein bacteria multiply in the blood
sermon moral or religious lecture delivered by a priest
shōgun literally 'barbarian-conquering great general'; the Japanese emperor's chief military adviser and hereditary commander-in-chief, with the duty to protect Japan from foreign invasion
shaman a person who claims to communicate with spirits through mystic rituals
shell middens Indigenous Australian archaeological sites where the debris associated with eating shellfish and similar foods has accumulated over time
Shintō an ancient Japanese religion the followers of which believe in nature spirits and ancestor worship
short-term goals are things that we want to do within the next couple of months or even within the year; this might include a plan to buy something
significance the importance assigned to particular aspects of the past; for example, events, developments, movements and historical sites
slum a run-down area of a city characterised by poor housing and poverty
soft engineering a coastal management technique where the natural environment is used to help reduce coastal erosion and river flooding
soluble able to be dissolved in water
space how features and places are arranged on Earth's surface; where things are located, how they are distributed, and the patterns they form
stalactite a feature made of minerals, which forms from the ceiling of limestone caves, like an icicle. These are formed when water containing dissolved limestone drips from the roof of a cave, leaving a small amount of calcium carbonate behind.
stalagmite a feature made of minerals found on the floor of limestone caves. These are formed when water containing dissolved limestone deposits on the cave floor and builds up.

standard of proof the level of proof required to establish a case. In criminal law, the prosecution must prove that the accused is guilty beyond reasonable doubt.
statute law law made by parliament
statutory interpretation the process used by judges to decide the meaning of words or phrases in a statute (Act of Parliament)
stereotype widely held but oversimplified idea of a type of person or thing
stirrup foot supports suspended from a saddle by straps
strata (singular: stratum) distinct layers of material beneath the ground, built up over time, that provide information for archaeologists and geologists
subduction when two tectonic plates converge, one will be forced under the other and into the mantle. The other plate will be pushed up, forming mountains.
subjective based on personal feelings rather than on facts
summary offence a minor criminal offence such as a road traffic offence and minor assault
superannuation fund the amount of money a person has in their retirement fund. This will consist of the payments that the person has made from their income, combined with what their employer has contributed.
superannuation or super is the term for retirement funds. Most working Australians pay into a super fund from their income (as wage or salary) and employers make similar regular contributions.
sustainability meeting the needs of the present without compromising the ability of future generations to meet their own needs
swash the movement of water in a wave as it breaks onto a beach
tabled in parliament a document presented to both houses of parliament for review before a legislation is passed
tapestry carpet-like wall-hanging
tariff a tax on goods imported from a foreign country
tax a compulsory financial charge or some other type of levy imposed on an individual, household or business by a government body in order to fund government spending
tea ceremony an ancient Japanese ritual of serving and drinking tea
tectonic plate one of the slow-moving plates that make up the Earth's crust. Volcanoes and earthquakes often occur at the edges of plates.
temperate zone describes the relatively mild climate experienced in the zones between the tropics and the polar circles
terra nullius ('land belonging to no-one') in Australia, the legal idea that since no-one was 'using' the land when the first Europeans arrived, it could be claimed by the British Crown
thatch straw used for making roofs
theologian a person who is considered to be an expert in religious matters
thing regional meeting held to decide local issues in Norway and Iceland during the Viking Age
timeline a diagrammatic tool representing a period of time, on which events are placed in chronological order
townspeople those who lived in towns and cities, including merchants, craftsmen, and labourers. They were not part of the feudal system like peasants and nobles.
transboundary river a river that flows through multiple countries, creating international borders
transport the movement of eroded materials to a new location by elements such as wind and water
treaty a formal agreement between two or more nations
tree change movement of people from major cities to live near the forest to achieve a change of lifestyle
trespass a tort (civil wrong) involving direct and intentional interference with a person, or a person's land or goods
tributary a state that gives payment to another state or ruler
tuberculosis a serious and infectious disease that affects the lungs
typhoon name given to big tropical storms in the Pacific and Indian Ocean
unemployment benefit a welfare payment by government to people who are unemployed and looking for work. Such payments in Australia are generally known as the JobSeeker Payment.

urban sprawl when cities expand, the urban landscape invades the surrounding land, changing or removing natural ecosystems and swallowing up farmland. This expansion is known as urban sprawl.

urban relating to a city or town; the definition of an urban area varies from one country to another depending on population size and density

urbanisation the growth and expansion of urban areas and the increasing proportion of people living in urban areas as compared to rural areas

utilities services (such as power or water) provided by the government or private suppliers

values individual beliefs that help to guide our actions

variables (in Geography) characteristics that can be measured and provide information about a place, beyond just the location of that place

vassal a person who holds land for a lord, and in return pledges loyalty and service to him

vernacular everyday language spoken by a particular group or class

volcanic loam volcanic soil composed mostly of basalt, which has developed a crumbly mixture

wants goods or services that are desired in order to provide satisfaction to the user, but which are not necessary for survival or to meet the basic standard of living in a community

washi handmade paper created from the bark or fibre of various shrubs, grasses or trees

watershed an area or ridge of land that separates waters flowing to different rivers

weathering the breaking down of bare rock (mainly by water freezing and cooling as a result of temperature change) and the effects of climate

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